



Helping Justice-Involved Reenter Employment

(HIRE)

Application Guide

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## **HIRE Application Guide**

The Helping Justice-Involved Reenter Employment (HIRE) Application Guide provides technical guidance for completing and submitting an application through the [Cal-E-Grants website](#). The California Workforce Development Board (CWDB) recommends that prospective applicants read this document before applying for funds. For a full overview of HIRE application requirements, please review the [HIRE Request for Applications](#).

### **Technical Review**

All applications received will be subject to an initial round of review for adherence to and alignment with HIRE program requirements. Prior to the CWDB's application scoring process, all applications will be reviewed for the following:

- Tax-exempt status
- Appropriate partnership agreements that detail each party's role in relation to the proposed project(s)
- Verification of annual operating budget

Applications that are missing the required documentation are subject to automatic disqualification.

### **Application Questions**

All questions regarding the HIRE program will be addressed in a weekly Q&A document, which will be posted on the HIRE webpage beginning Friday, May 26, 2023.

Please email questions to: [Solicitations@cwdb.ca.gov](mailto:Solicitations@cwdb.ca.gov), use "HIRE Question" in the subject line AND include a screenshot for assistance with application issues.

### **HIRE Project Types**

The CWDB has identified four different project types for the HIRE initiative:

1. Independent projects
2. HIRE Network Hubs
3. HIRE Network Spokes
4. Technical Assistance (TA)

Prospective applicants must identify a single project type before applying. Organizations may only apply for one project type, excluding TA.

Applicants applying for the Technical Assistance (TA) grant may also apply under one of the additional three (3) project types.

### **Independent Projects**

Independent projects consist of a single Community Based Organization (CBO), which will act as the lead fiscal agent and be responsible for submitting a complete application package outlining how the organization will recruit, train, and provide supportive services to participants. The organization will also establish and/or reinforce existing relationships with the local and state corrections system(s) to support participants' successful transition from the justice system to the labor force. For purposes of this application, small CBOs are defined as organizations with

an annual budget less than or equal to \$1.5M. Large CBOs are defined as organizations with annual budgets exceeding \$1.5M.

***Small CBO***

**Annual Budget:** Less than or equal to \$1,500,000.00

**Maximum Award:** \$250,000.00

**Grant Term:** 12 months

***Large CBO***

**Annual Budget:** \$1,500,000.00 or above

**Maximum Award:** \$750,000.00

**Grant Term:** 12 months

***HIRE Networks***

A HIRE network is a group of organizations applying collectively via one application. HIRE networks will consist of a single large CBO as the lead applicant, or Network Hub, and one or more large or small CBOs as partner applicants, or Network Spoke(s). Allowable HIRE network sizes are determined by the Network Hub's annual operating budget and organizational capacity.

***Network Hub***

HIRE Network Hubs (Hubs) will serve as the primary point of contact for the CWDB and are responsible for organizing, coordinating, and reporting on project activities, deliverables, and program metrics on behalf of their proposed Network. Network Hubs will serve as the fiscal agent, convener, and lead reporting entity for their entire Network and are expected to administer fiscal responsibilities for all other projects in their application that will serve this initiative. Like independent projects and Network Spokes, Network Hubs may also provide services to participants.

Hubs may request up to \$750,000 for their own HIRE program activities and up to an additional 10% of the collective amount of awarded funding to their Network's Spokes. This bonus funding is only available to Hubs and must be applied toward supporting the project(s) within their HIRE Network.

The total number of Spokes a Network application may have are based on the Network Hub's annual operating budget as specified below:

**Hub Size # 1**

**Annual Budget:** \$1,500,000 - \$4,000,000

**Maximum Award to Hub:** \$750,000.00\*

**Maximum Partners:** up to three (3) Spokes

**Grant Term:** 12 months

**Hub Size #2**

**Annual Budget:** \$4,000,000 - \$10,000,000

**Maximum Award to Hub:** \$750,000.00\*  
**Maximum Partners:** up to six (6) Spokes  
**Grant Term:** 12 months

### **Hub Size #3**

**Annual Budget:** \$10,000,000 or more  
**Maximum Award to Hub:** \$750,000.00\*  
**Maximum Partners:** up to nine (9) Spokes  
**Grant Term:** 12 months

\*Award amount does not reflect the maximum 10% in additional funding that Network Hubs can receive to support their network.

### **Network Spoke**

HIRE Spokes (Spokes) are community and/or nonprofit organizations applying as part of a Network with a Hub via a single application. Spokes will work collaboratively with their Hubs to fulfill CWDB reporting requirements, complete financial transactions, and develop a Community of Practice within their network. This includes but is not limited to, the issuance of needs-related payments and accounting reports.

### **Large CBO Spoke**

**Annual Budget:** \$1,500,000 or more  
**Maximum Award:** \$750,000.00  
**Grant Term:** 12 months

### **Small CBO Spoke**

**Annual Budget:** \$1,500,000 or less  
**Maximum Award:** \$350,000.00  
**Grant Term:** 12 months

### **Technical Assistance**

Up to \$500,000 is available to fund a TA team to assist CWDB staff in continued development and implementation of awarded projects. TA applicants will complete a separate application which will be reviewed on the same timeline as the HIRE project application and the award timeline. The TA grantee will work closely with CWDB staff to develop and provide a forum for cross-project communication and peer-to-peer learning, to support project-specific outcomes and broad HIRE goals.

### **Application Category**

To apply for HIRE funding, choose the appropriate application category from the pop-up menu by selecting either *HIRE Program* or *HIRE Technical Assistance*. The application category chosen will determine the cover page, narrative questions, and funding range eligibility in the application.

## HIRE Program

Organizations applying as independent projects or as part of a HIRE Network (Hub or Spoke) must select *HIRE Program*.

Based on the selection, the drop-down labeled *Project Type* will provide two options: *Independent* or *Network*. To apply as an Independent applicant, select *Independent*.

### **How to Apply as a HIRE Network: Linking Hub & Spoke**

To apply as a Network Hub or Network Spoke, select *Network*. Based on the selection, the drop-down menu labeled "Role" will provide two options: *Hub* or *Spoke*.

As the lead applicant, the Hub *must* start the application AND create the project name on behalf of the Network. The project name links all applications (Hub and Spoke) in the Cal E-Grants system and must be shared with each organization to establish linkage.

**Note:** The CWDB strongly recommends applicants choose a unique project name to distinguish between projects; (e.g., *Lead Organization Name: Project Name.*)

As the lead applicant, it is the Hub's responsibility to communicate and coordinate with the Spoke applicants in their Network.

After the Hub submits and confirms the application's status is "in progress," the Spoke(s) will create their application and link to the Hub's application by entering *the same project name* in the *Project Name Lookup* field.

Once the applications are linked, the Hub has specific user permissions in Cal-E-Grants to view all Spoke applications and their application status (i.e., *In Progress, Submitted*). This is a view-only feature available for Hubs. Spoke(s) can only view and access their own application.

**Note:** Once applications are submitted, they are final and no changes will be allowed. The CWDB **strongly recommends** Hubs review all Spoke applications for consistency and accuracy across their Network before they are submitted.

To verify the Spokes are linked to their HIRE network, the Hub will click on the cover page of the application. All applicants within the Network will be listed in the *Related Spoke Applications* box, outlined in red. Refer to the image below for an example of a Hub with linked Spoke applicants. The primary contact listed in the application will also receive an email notification each time an applicant joins their HIRE Network.

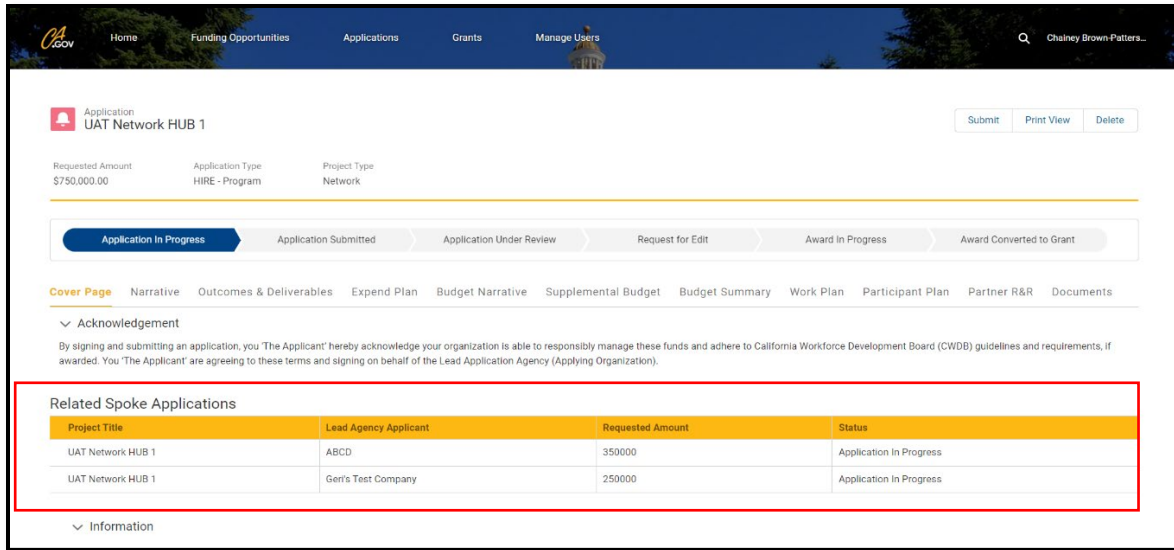


Image 1 – Related Spoke Applications Example

Spokes must complete and submit their applications before the Hub can submit its application on behalf of the Network. It is the Hub’s responsibility to manage the application period for their Network, making sure that the Spoke applications are submitted early enough to allow time for the Hub to review and consolidate information into the lead application and submit before the deadline.

### HIRE Technical Assistance

Organizations applying as Technical Assistance providers must select *HIRE - Technical Assistance*.

For additional information regarding the application, refer to the Technical Assistance section on page 8.

### Logging in to Cal-E-Grants

For first time users of the Cal-E-Grants website, refer to the [New User Registration](#) page.

If the applicant organization has previously created a user account, they must log in to the [Cal-E-Grants](#) website using the administrator credentials previously created by their organization. It is recommended that only the individual with the organization's administrator add new users and manage existing users. The administrator can add multiple users, inactivate users, and delete the contents of input fields in the application. Once added as a new user, applicants can complete and submit the HIRE application, and if awarded access, can also complete and submit Quarterly Progress Reports, Invoices, Modification Requests, and other documents.

### Adding New Users

Complete the following steps to add additional users:

1. Select *Manage Users* at the top of the webpage.
2. Select *Add a New User* (located on the far right above the yellow bar).
3. A "Create a New User" pop-up screen will appear.



4. Enter contact information for the new user (Name, Email, Phone, etc.) and permission type.  
**Note:** The permission type drop-down will provide two options: *Administrator* or *User*. The *Administrator* option authorizes the new user to have access rights to the HIRE grant, similar to the original Administrator.
5. Select *Create* when complete.

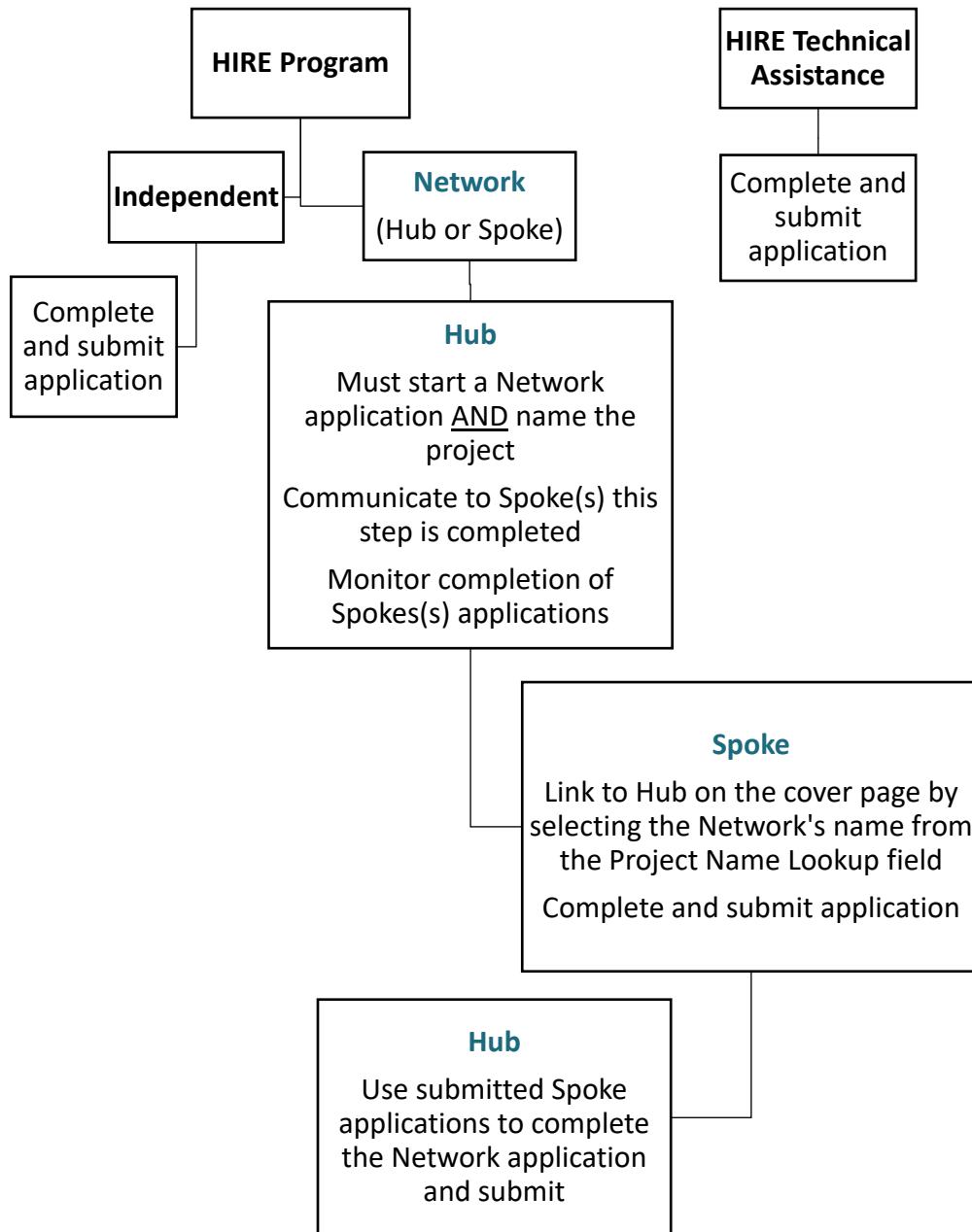
New user(s) will receive an email notification with a hyperlink to create a password and formally create an account using their own credentials.

#### **Deactivating a User:**

1. Go to the *Manage Users* tab to view the list of the users added.
2. Select *Edit* for the specific user desired to be deactivated.
3. From the pop-up window, uncheck the *Active* box, and select *Update*.

See HIRE Program Application flow chart on the next page.

## HIRE Program & Technical Assistance Flow Chart



## How to Complete HIRE Application Tabs

### Cover Page: Independent Project

Complete all required fields (required fields are denoted with a \*).

**Lead Agency Applicant\*:** List the organization applying for HIRE funds. Note that the agency listed will assume the role of the lead fiscal agent, if awarded.

**Project Name\*:** List the name that will be used to identify the proposed project.

**Program Geography\*:** List the area(s) where services will be delivered.

**Project Cost\*:** Maximum funding ask is noted with the project type descriptions above.

**Match:** List any leveraged/match funds under the proposed project. Note that leveraged/match funds are not required for the HIRE grant.

**Unique Entity ID (UEI):** This number replaced the DUNS with the federal government. For more information, see the [sam.gov](https://sam.gov) website. If an organization has not yet transitioned from a DUNS number, enter the DUNS number instead.

**Federal Tax ID\*:** An Employer Identification Number (EIN), or a Federal Tax Identification Number, is used to identify a business entity. This is a nine (9) digit number assigned by the Internal Revenue Service. For more information, see the [irs.gov](https://irs.gov) website.

**Points of Contact\*:** List two *different* points of contact for the primary and fiscal in case one contact is not available.

**Note::** The Cal-E-Grants automatic notification is currently only sent to the designated primary contact of the application. Be sure to update the cover page if the primary contact changes during the application process. Should the primary point of contact change after the application is submitted, please notify [Solicitations@cwdb.ca.gov](mailto:Solicitations@cwdb.ca.gov).

**Acknowledgment\*:** After completing the cover page, select SAVE. Applicants must acknowledge acceptance of fiscal responsibility for managing state funds *prior* to moving to complete the application.

### Cover Page: Technical Assistance

Complete all required fields (required fields are denoted with a \*).

**Lead Agency Applicant\*:** List the organization applying for HIRE funds. Note: the agency listed will assume the role of the lead fiscal agent if awarded.

**Project Name\*:** List the name that will be used to identify the proposed project.

**Project Cost\*:** Maximum funding ask is noted with the project type descriptions above.

**Unique Entity ID (UEI):** The UEI replaced the DUNS with the federal government. Visit the [sam.gov](https://sam.gov) website for more information. If an organization has not yet transitioned from a DUNS number, enter the DUNS number instead.

**Federal Tax ID\*:** An Employer Identification Number (EIN), or a Federal Tax Identification Number, is used to identify a business entity. This is a nine (9) digit number assigned by the Internal Revenue Service. For more information, see the [irs.gov](https://irs.gov) website.

**Points of Contact\*:** List a *different* point of contact for the primary and fiscal contact fields to ensure your organization is reachable throughout the application and award processes.

**Note:** The Cal-E-Grants automatic notification is currently only sent to the application's designated primary contact. Be sure to update the cover page if the primary contact changes during the application process. Should the primary point of contact change after the application is submitted, please notify [solicitations@cwdb.ca.gov](mailto:solicitations@cwdb.ca.gov).

**Acknowledgment\*:** After completing the cover page, select *Save*. Applicants must acknowledge acceptance of fiscal responsibility for managing state funds *prior* to completing the application.

#### **Cover Page: Network Hub**

Complete all required fields (required fields are denoted with a \*).

**Lead Agency Applicant\*:** List the organization applying for HIRE funds. Note that the agency listed will assume the role of the lead fiscal agent if awarded.

**Project Type\*:** Network

**Role\*:** Select *Hub* from the drop-down menu.

**Project Name\*:** List the name that will be used to identify the proposed project.

**Note:** The CWDB **strongly recommends** applicants choose a unique name to distinguish between projects. i.e.: *Lead Applicant Name - Project Name*.

**Network Partners\*:** List all organizations applying as part of the HIRE Network.


**Program Geography\*:** List the area(s) where services will be delivered.

**Project Cost\*:** Maximum funding ask is noted with the project type descriptions above.

**Note:** The Hub's total requested funding must include:

1. The total amount of their own HIRE project (up to \$750,000)
2. The total amount of all their Spoke(s) requested funding

3. Up to 10% of the collective amount of awarded funding to their network's Spoke(s).

The Hub may adjust the total funding requested while the application is *in-progress* by clicking the pencil icon (  ) on the cover page.

**The CWDB strongly recommends Hubs review all applications for consistency and accuracy across their Network before the Spoke(s) submit, as no changes will be allowed.**

**Match:** List any leveraged/match funds under the proposed project. Note that leveraged/match funds are not required for the HIRE grant.

**Unique Entity ID (UEI):** This number replaced the DUNS with the federal government. For more information, see the [sam.gov](https://sam.gov) website. If an organization has not yet transitioned from a DUNS number, enter the DUNS number.

**Federal Tax ID\*:** An Employer Identification Number (EIN), or a Federal Tax Identification Number, is used to identify a business entity. This is a nine (9) digit number assigned by the Internal Revenue Service. For more information, see the [irs.gov](https://irs.gov) website.

**Points of Contact\*:** List two *different* points of contact for the primary and fiscal, in case one contact is not available

**Note:** The Cal-E-Grants automatic notification is currently only sent to the designated primary contact of the application. Be sure to update the cover page if the primary contact changes during the application process. If the primary point of contact changes after the application is submitted, please notify [Solicitations@cwdb.ca.gov](mailto:Solicitations@cwdb.ca.gov).

**Acknowledgment\*:** After completing the cover page, select *Save*. Applicants must acknowledge acceptance of fiscal responsibility for managing state funds *prior* to moving to complete the application.

#### **Cover Page: Network Spoke**

Complete all required fields (required fields are denoted with a \*).

**Lead Agency Applicant\*:** List the organization applying as a *Network Spoke*.

**Project Type\*:** Select *Network* from the drop-down menu.

**Role\*:** Select *Spoke* from the drop-down menu.

**Project Name Lookup\*:** Use the *Project Name Lookup* to select the Network that the Spoke will link to their application.

To edit or change the name of the Network click the pencil icon on the Cover Page.

**Program Geography\*:** List the area(s) where services will be delivered.

**Project Cost\*:** Maximum funding ask is noted with the project type descriptions above.

**Match:** List any leveraged/match funds under the proposed project. Note that leveraged/match funds are not required for the HIRE grant.

**Unique Entity ID (UEI):** This number replaced the DUNS with the federal government. For more information, refer to the [sam.gov](https://sam.gov) website. If an organization has not yet transitioned from a DUNS number, enter the DUNS number.

**Federal Tax ID\*:** An Employer Identification Number (EIN), or a Federal Tax Identification Number, is used to identify a business entity. This is a nine (9) digit number assigned by the Internal Revenue Service. For more information, refer to the [irs.gov](https://irs.gov) website.

**Points of Contact\*:** List two *different* points of contact for the primary and fiscal in case one contact is not available.

**Note:** The Cal-E-Grants automatic notification is currently only sent to the application’s designated primary contact. Be sure to update the cover page if the primary contact changes during the application process. Should the primary point of contact change after the application is submitted, please notify [Solicitations@cwdb.ca.gov](mailto:Solicitations@cwdb.ca.gov).

**Acknowledgment\*:** After completing the cover page, select *Save*. Applicants must acknowledge acceptance of fiscal responsibility for managing state funds *prior* to moving to complete the application.

### Narrative

Provide a response to each required question prompt. Responses should be as detailed as possible and directly address the prompts. The applicant should read through all the narrative questions before starting. There is a 3000-character limit per response box.

**Note:** Remember to *Save* work often. The system will automatically log out after one hour of idle time.

### Outcomes & Deliverables

What will the project do?	How will this be measured/achieved?
<i>List specific project outputs and outcomes (quantitative and/or qualitative).</i>	<i>Describe how you will know if the project is successful. (Quantitative and/or Qualitative targets).</i>

There is a 500-character limit per response box.

**Note:** Remember to *Save* work often.

### Expenditure Plan

Enter the grant amount allocated to *Administrative Costs* and *Program Costs*, and if applicable, enter *Cash* or *In-Kind Match* under the Funding Plan. The amounts for *Total Administration* and *Total Program Cost* under the Grant Funds column should be equal to the requested amount.

Under the *Expenditure Plan*, enter the estimated expenditure amount for each quarter in the Quarterly Planned Expenditures column, and if applicable, enter the estimated expenditure amount within each quarter under the Quarterly Planned Match column.

**Note:** The grant term for all project types is 12 months (four quarters, three months each).

Remember to *Save* work.

### Budget Narrative

Provide expense descriptions for line items with grant fund allocations. Descriptions must fully address the prompt under each line item. For example, the description for *Staff Salaries and Benefits* must include the job titles, roles, and responsibilities for each staff member associated with the project.

A Supplemental Budget must be completed (on the *Supplemental Budget* tab) if grant funds are allocated for:

- Small purchases (\$2,500 or more)
- Equipment purchases
- Leased equipment
- Contractual services and/or subrecipient

Enter needs-related payment funds into the *Other* line item, and provide a clear description of how these funds will be allocated. Needs-related payments cannot exceed 30% of the applicant's total funding requested.

If there is no grant fund allocation for a line item, leave the description text box blank. **Do not enter** "N/A" or "Not Applicable" as it will prompt the system to ask for an amount other than \$0.00 to be entered.

**Note:** Remember to *Save* work.

### Supplemental Budget

Complete the Supplemental Budget tab if grant funds are allocated for the below items in the budget narrative:

- Small purchases (\$2,500 or more)

- Equipment purchases
- Leased equipment
- Contractual services and/or subrecipient

**Note:** Remember to *Save* work.

### Budget Summary

Review the line items and determine how the requested amount will be allocated for the project. Enter the allocated amounts to the applicable line items under the Grant Fund column.

A maximum of 20 percent (20%) of the requested amount may be allocated to Administrative Costs. Indirect Cost Rate falls under Administrative Costs and cannot exceed 20 percent. If an applicant has a Negotiated Indirect Cost Rate Agreement (NICRA) that is more than 20 percent and wants to include such under the Indirect Costs line item, it is allowable. However, Administrative Costs must remain below 20 percent of the request amount. If using NICRA, an applicant must provide the indirect cost rate (percentage) and name of cognizant agency in the appropriate text boxes.

**Note:** Supporting document/letter(s) with the indirect cost rate and name of cognizant agency must be uploaded to the *Documents* tab.

**Direct Program Costs** are expenses directly related to implementing the proposed grant activities.

**Administrative Costs** are expenses directly associated with grant implementation, management, and reporting.

**Indirect Costs** are expenses associated with the costs of doing business that are not readily identified within a particular grant, contract, project function or activity, but are necessary for the general operation of the organization and the activities it performs. Indirect costs are frequently referred to as overhead expenses. Generally, direct administration costs differ from indirect costs in that the latter are considered organization-wide costs that are required to run operations, but do not have a direct role in grant implementation.

When determining if a grant allocation should be categorized as a contractual service or as a responsibility of the lead fiscal agent, please refer to the descriptions below.

A *Subrecipient's* role within a project:

- Uses state funds to carry out a program for a specified public purpose as opposed to providing goods or services for a program.
- Directly supports the goals of the grant.
- Is responsible for adherence to applicable state program compliance requirements.

A *Contractor's* role within a project:



- Provides (commercial) goods and services to a variety of purchasers within normal business operations.
- Operates in a competitive environment.
- Provides goods or services that are ancillary to the operation of the state program.
- Not subject to state compliance requirements of the program resulting from the agreement.
- Does not participate in program design.
- Holds little or no independent discretion over program work or direction.
- Undelivered work will result in non-payment.
- Not required to directly support goals of the grant.

**Note:** Subrecipients and/or Contractors listed as *To be Determined (TBD)* in the budget tabs must be formally authorized by written approval from the CWDB prior to engaging in any project work.

If cash or in-kind match is included, enter allocated amounts to applicable line items under the *Leveraged Funds (Match)* column, then complete *Source of Leveraged Funds* and *Type of Leveraged Funds* columns. *The Source of Leveraged Funds* may be the name of the funding stream and/or name of the contributing organization.

**Note:** The amounts for the applicable line items on the *Budget Summary* tab must match the amounts for the applicable line items in the *Budget Narrative* tab.

**Note:** Remember to *Save* work.

### Work Plan

List the objective or activity to occur each quarter, with estimated completion dates that fall within the grant term. Please ensure estimated completion dates fall within the correct quarter. Objectives and activities need to be related to deliverables and outcomes. Enter one objective or activity per line. If an objective or activity happens over multiple quarters, note the start of the activity in its first quarter and completion of activity in its last quarter.

**The CWDB recommends using an April 1, 2024, start date for your work plan.**

The four quarters are defined as follows:

- *Quarter 1:* January to March
- *Quarter 2:* April to June
- *Quarter 3:* July to September
- *Quarter 4:* October to December

If participant activities are included in the *Work Plan*, they should align with the participant data listed in the *Participant Plan* tab. For example, if a project lists participant enrollments

occurring in Quarter 2 in the Work Plan, the Participant Plan should have an enrollment number listed for Quarter 2.

**Note:** The grant term for all project types is 12 months (a total of four quarters). While the application allows for 13 quarters of activities, applicants will only need to complete information for the grant term of 12 months.

Remember to *Save* work.

### **Participant Plan**

Determine how many participants to enroll, provide training, receive credential/degree and place in post-secondary education, state-approved apprenticeship, career advancement/promotion (Incumbent Worker), and/or employment for the grant term. Identify when enrollment, training, degree/credential attainment, and placement will occur, and enter the total participant numbers for each category for the respective quarters.

The participant data listed in the Participant Plan must align with the objectives and activities outlined in the Work Plan and Outcomes & Deliverables.

When determining the number of participants to enroll and provide services to, please ensure the applying organization has the staff capacity to verify services and accurately manage all participant data.

**Note:** The grant term for all project types is 12 months (a total of four quarters).

Remember to *Save* work.

### **Partner Roles and Responsibilities**

Clearly articulate the roles and responsibilities of each partner listed in the application. Each application must include partnership agreements between a local government entity and one or more local workforce development boards *for each jurisdiction* where services are delivered.

Partnership agreements must be included in the Upload Documents tab of the application. For each partner, note any leveraged match (cash or in-kind).

### **Partnership Agreements**

Formal partnership agreements are required between the applicant and at least one local government entity AND at least one local board representing the geographic area served. A formal partnership agreement can be an MOU or other format. A Letter of Support does not constitute a formal partnership agreement.

Formal partnership agreements will include:

- Working relationship between entities
- Outlined roles and responsibilities
- “Wet” or electronic signatures of authorized parties

**Note:** Organizations applying as a Spoke within a Network are not required to submit partnership agreements, provided their Hub is submitting signed partnership agreements with local government and local workforce development board partners in the same geographic area as the Spoke's proposed service delivery area.

Remember to *Save* work.

## Uploading Documents

### Required Forms

Applicants are required to upload the following documents:

- Partnership agreement with at least one local government entity.
- Partnership agreement with one or more local workforce development board representing each jurisdiction where services are to be delivered
- Proof of nonprofit status
- Proof of annual budget
- [STD 204](#)

**Note:** TA applicants are only required to upload *STD 204*.

### Optional Forms

- [STD 205](#)
- NICRA (optional unless requesting more than *de minimus* rate)\*

\*The following supporting documentation is required and uploaded if an applicant is using a negotiated indirect cost rate over 20%:

- Current supporting documentation with indirect cost rate (percent)
- Name of cognizant agency

If a project is recommended for a grant award, the following prior written approval forms may be required during the application revision process.

- **CWDB Purchase Justification Approval Form** - Required for purchases over \$2,500. This pertains to an individual unit purchase as well as purchase orders totaling more than \$2,500. The Fiscal Agent is responsible for obtaining three competitive quotes for purchases over \$2,500 to justify that the cost of the expense is reasonable. The Fiscal Agent is not required to submit the quotes but must keep this information on file.
- **CWDB Use of Funding Approval Form** - Required for any expenses listed in the budget in which the cost's relation to the scope of work or project outputs or outcomes cannot be determined. The Fiscal Agent must provide justification for the cost as well as an explanation for its relation to the scope of work or project outputs and outcomes.
- **CWDB Use of Funding for Child Care Approval Form** - Required if funds are allocated for child care under the Supportive Services line item in the Budget Narrative. The Fiscal Agent must ensure the following:
  - Child care costs do not exceed \$1,400 per child per month,

- Maintain three competitive quotes for licensed child care providers for three years.
- Obtain receipts from the participants for child care costs incurred during the grant term.

### **Uploading a new document**

Take the following steps to upload a new file or re-upload:

1. Select *New* at the far right of the yellow bar above Action. A *Create Document* pop-up window will appear.
2. Enter a file name under *Document Name* and select *Document Format* from the drop-down menu. (i.e., Word, PDF, ZIP, All types)  
**Note:** All file types are accepted (Word, Excel, PDF, etc.).
3. Use *Other/Comments* section to describe document (encouraged, not required).
4. Select *Save*. A green success message will appear at the top of the screen.

View the updated document by selecting the blue links under Name or Version columns.

**Note:** If edits must be made after the document was created and uploaded, do not click the *Upload Files* tab to re-upload the updated document. Instead, follow the instructions under *Upload a New Document* for the desired document to be re-upload. This step will prevent and override on the uploaded document(s) and allow the CWDB staff to view all new and updated files.

### **Verifying Annual Operating Budgets**

Annual budgets from organizations may be verified by following the outlined next steps:

#### **Obtaining and Using Form 990**

1. Create a free account on [guidestar.org](http://guidestar.org).
2. Enter the name of the organization you wish to obtain a Form 990 for.
3. In the summary section, download the most recent Form 990.
4. Calculate an estimation of an organization's annual operating budget using the following formula:

Go to Part IX of Form 990:

- a. Part IX Line 25 MINUS(-)
- b. Part IX Line 1 MINUS(-)
- c. Part IX Line 2 MINUS(-)
- d. Part IX Line 3 MINUS(-)
- e. Part IX Line 4 EQUALS(=)

The final number is an estimate of the organization's annual operating budget.

### **Submitting an Application**

Select *Submit* (top corner) to submit a completed application for review. Select *Yes* to the "Are you sure you want to submit the application?" prompt. After selecting *Yes*, a message confirming the document was successfully submitted will appear.

The Cal-E-Grants system will not allow users to submit for review if there are errors present. The system will display a list of outstanding errors that need to be resolved in order to submit.

**Print View**

To print and/or save a PDF version of an application, select *Print View* in the upper right-hand corner of the application to generate a PDF file with all tabs of the application. This function will display all inputs made to application tabs when it is printed.