

H RTP RWP Orientation Webinar Transcript

Slide 1 – Title Page

Welcome to the High RoadSM Training Partnerships Resilient Workforce Program (H RTP RWP) orientation webinar presented by the California Workforce Development Board (CWDB.)

Slide 2 – Webinar Recording

This presentation has been pre-recorded and is available on the H RTP Grantee Portal to review at any time throughout the grant term.

Additional instructions, information, and guidance for all areas of this training are in the H RTP: RWP Grant Administration Guide, posted on the H RTP Grantee Portal.

Please send questions or assistance requests to the H RTP inbox at H RTP@cwdb.ca.gov. Since this is a shared inbox for multiple H RTP projects, please ensure your email correspondence includes a clear subject line. An example subject line would be “H RTP: RWP – Grantee Name – Monthly Invoice Question.”

Slide 3 – Presentation Overview

This onboarding training is designed to provide a general overview of the H RTP RWP grant expectations. After this training, all grantees should thoroughly review the H RTP RWP Grant Administration Guide, as it is a more comprehensive resource for Awardees/Fiscal Agents highlighting key grant expectations and requirements.

This orientation will cover the following topics: Role of the California Workforce Development Board, Role of the Fiscal Agent/Awardee Cal-E-Grants, Project Progress and Modifications, Project Reporting, Monthly Fiscal Expenditure Reporting, Tools and Resources, and directions for submitting a self-attestation form verifying your agency staff viewed this onboarding webinar.

Slide 4 – Role of the California Workforce Development Board *[Divider]*

Role of the California Workforce Development Board

The following section will provide an overview of the CWDB Branches, their roles in managing the H RTP: RWP grant, and how the Fiscal Agents can contact them via the initiative inbox.

Slide 5 – Program Implementation and Regional Support Branch (Program Branch)

The role of the Program Branch is to provide Fiscal Agents with the support, resources, and technical assistance needed to execute project deliverables successfully throughout the grant term. The services we provide include, but are not limited to, the following:

- Provide general project management and technical assistance.
- Oversee grant administration of the standard agreement.
- Facilitate progress reporting and project barrier resolution(s).

- Process invoices, confirm allowable use of funds, and respond to general budget inquiries.
- Assist with modification requests and exhibit revisions.

Slide 6 – Policy, Research, and Legislation (PRL) Branch

The Policy, Research, and Legislation Branch (PRL) is responsible for answering all questions related to participant data reporting requirements and procedures. Areas of assistance include, but are not limited to:

- Grant Program Data Guide
- Participant reporting requirements
- Data system technical assistance (note this grant will use Cal-E-Grants, not CalJOBS).
- Placement assistance

A separate training related to participant data collection requirements led by the PRL Branch will be available to grantees and posted on the Grantee Portal.

Please direct all data-related questions to the Research Unit inbox.

Slide 7 – Role of the Fiscal Agent/Awardee *[Divider]*

Role of the Fiscal Agent/Awardee

The following section will provide an overview of the general requirements and responsibilities of the Fiscal Agent. The term “Fiscal Agent” refers to the awarded agency that enters into a contractual agreement with the State of California.

Slide 8 – Fiscal Agent/Awardee Requirements and Responsibilities

The Fiscal Agent must be attentive and responsive to all communication with the CWDB. This means being proactive in communicating project challenges as they arise, as well as meeting all deadlines for reporting and invoicing and providing timely communication responses to CWDB staff when requested. This includes updating the CWDB on internal staff changes that impact grant communication by updating the Specific Points of Contact Form as needed throughout the grant term.

Projects must be managed in accordance with their original proposal and award. For this reason, the Fiscal Agent is responsible for notifying the CWDB of project adjustments, pivots, or delays to ensure that procurement requirements are still being met.

The Fiscal Agent is responsible for adherence and compliance with all requirements outlined in the HRTP: RWP Grant Administration and Data Collection Guides. It is the responsibility of each project to review and familiarize themselves with all requirements outlined in the guides located on the HRTP portal.

Slide 9 – Fiscal Agent/Awardee Requirements and Responsibilities (Continued)

In addition to proactive communication regarding challenges and changes in points of contact, Fiscal Agents are also responsible for meeting all internal deadlines set by the CWDB, including but not limited to semi-annual reporting, monthly invoicing, and ad hoc information requests.

For projects serving participants, Fiscal Agents are responsible for all Case Management services and applicable data reporting requirements as outlined in the Data Collection Guide on the H RTP grantee portal.

Regardless of whether they serve participants, all projects are responsible for reporting their project deliverables outlined in their contract exhibits to the CWDB.

Slide 10 – Single Points of Contact (SPOC)

All Fiscal Agents/Awardees must designate certain staff as Single Points of Contact (SPOC), who will keep the CWDB updated on parts of the project. A SPOC form will identify individuals within the project who will be responsible for the following areas:

- Project Lead – Main point of contact for the CWDB to engage with on grant administration, project status and activities, and information requests. Responsible for responding on behalf of the grant to the CWDB. This contact will be included on all emails regarding the grant. Must list a primary and a secondary.
- Fiscal
- Participant Data Reporting
- Networking & Communities of Practice - Project team members to include when sharing information about webinars, communities of practice, peer learning events, and networking opportunities. Project team members, including partners, can be included.

This form should *always* be up to date. The Fiscal Agent is responsible for notifying the CWDB when there are changes in staff and points of contact.

Slide 11 – Cal-E-Grants [Divider]

This section will provide a brief overview of the Cal-E-Grants online system that will be used for project management purposes.

Slide 12 – Cal-E-Grants Overview

Cal-E-Grants, the same system that was utilized to submit H RTP: RWP applications, will continue to be used for the management of various project administration components for the duration of the grant term. This includes monthly invoicing, modification requests, semi-annual progress reports, and participant data collection. This is also how you will access crucial exhibits needed for project management – such as your Participant Plan or Workplan.

For this reason, all staff who are directly tasked with the program and fiscal reporting must have Cal-E-Grants accounts available upon the start of the grant period.

Slide 13 – Creating Cal-E-Grants Staff Accounts

The existing Cal-E-Grants Administrator, the individual who submitted the application for your organization, has the capability of creating accounts for all pertinent staff. To streamline the required reporting, all accounts should be created under the Administrator account. Individual

accounts that are not linked to the Administrator account should be avoided. If staff accidentally creates an account that is not linked to the Administrator account, notify CWDB staff immediately.

All support staff who will be involved in submitting monthly invoices, completing progress reports, and/or initiating modification requests will need to create staff accounts under the primary Administrator's account.

Detailed instructions for creating linked administrator and staff accounts are in the Grant Administration guide on the H RTP portal. The CWDB Program Branch is available to support and troubleshoot any Cal-E-Grants log-in issues.

[Slide 14 – Project Progress and Modifications \[Divider\]](#)

Project Progress and Modifications

This section will briefly review the steps necessary for initiating a modification request.

[Slide 15 – Communicating Project Progress and Changes](#)

All modifications will be done digitally via Cal-E-Grants. The Fiscal Agent will submit a Modification Request through the Cal-E-Grants system for the CWDB Program Branch to review. When a modification request is approved by the CWDB, a notification will be sent back to the Fiscal Agent to make edits to applicable exhibits within Cal-E-Grants. The CWDB will provide specific instruction and guidance on exhibit changes based on the modification request.

The modification approval is usually granted within a week of grantees submitting correct revised exhibits. The only time this timeline will exceed this is if the modification request is for adding funding or an extension to a grant – in those instances, approval may take 4 – 6 months. Modification requests are not approved until the Fiscal Agent has received correspondence from the CWDB confirming final approval, and the changes are reflected in Cal-E-Grants.

For additional guidance regarding project modification requests, please review the H RTP: RWP Grant Administration Guide, which provides step-by-step instructions.

If projects have questions about a potential modification, they can reach out to the Program Branch via the H RTP Inbox before submitting the request in Cal-E-Grants for consultation and support.

[Slide 16 – Project Modifications](#)

The CWDB recognizes that projects can evolve throughout the grant term, and projected activities may not always progress exactly as outlined in your original grant agreement. The exact reason for modifications can vary and include changes to the budget, formal partners, contractors, or other categories not already listed.

Any changes to the budget will require a modification to approve the new use of funds. Only budget exhibits are in your formal contract, which is why it is crucial that any and all changes to the budget be modified formally in Cal-E-Grants.

Please note that final modification requests must be submitted 60 days prior to your project's grant term end date.

Slide 17 – Project Reporting *[Divider]*

Project Reporting

This section will review reporting requirements.

Slide 18 – Quarterly Check-Ins

The purpose of the virtual quarterly check-ins is to provide ample opportunities for Fiscal Agents to have programmatic questions and/or concerns addressed and to obtain timely technical assistance. These meetings will be led by your assigned Program Analyst and are an opportunity for the CWDB to learn more about your H RTP activities and progress, including successes, challenges, and needs. Information gathered will further assist the CWDB in informing future opportunities for the H RTP workforce model. As needed, other CWDB staff may be in attendance.

The first check-in will be scheduled shortly after the start of the grant term to ensure that you have everything you need for successful grant implementation. Additionally, a discussion between the Fiscal Agent and CWDB will occur at the end of the first year of the grant period to determine if quarter check-ins will continue beyond that first year.

These check-in meetings are designed to be a collaborative space. Before each check-in, the CWDB will confirm the agenda, check-in dates, and times to provide ample time to prepare. We understand that regional needs can be extensive and vary from project to project. To understand the dynamics of the areas your project is serving, the CWDB highly encourages the attendance of required partners as well as key program staff to the extent feasible.

Slide 19 – Progress Reports

Semi-Annual Progress Reports capture and communicate important qualitative and quantitative data that are used to share best practices, highlight project successes, and elevate broad workforce barriers and obstacles. It is your opportunity to tell the story of what's happening with your project. Responses should be detailed and thorough and speak to activities and outcomes that align with your approved project exhibits.

Slide 20 – Progress Reports (Continued)

Reports are due on a semi-annual basis and will cover activities within the outlined reporting period.

Progress reports are used to gauge project progress and performance. Because of this, progress reports with insufficient responses, unclear information, or vague details may be returned and include requested revisions. On-time completion of reports is required. Reports with limited responses will be noted in project performance and evaluation. For this reason, we ask reports be taken seriously, and responses be detailed.

Consistently late or incomplete reports may result in disciplinary action.

Slide 21 – Semi-Annual Reporting Schedule

The Semi-Annual Progress Reporting Schedule will remain the same throughout the grant term. Progress reports reporting on activities from January 1st through June 30th will be due on July 20th, and reports on activities from July 1st through December 31st will be due January 20th.

Fiscal Agents/Awardees will receive a notification when the Semi-Annual Reporting templates are available in the Cal-E-Grants system. Grantees will submit responses via the Cal-E-Grants system. Detailed instructions on the submission process are in the H RTP: RWP Grant Administration Guide on the H RTP portal.

Slide 22 –Close-Out Report

Close-Out Reports will cover project activities for the project’s entire grant term from start to end and highlight the results. Deliverables will be pulled directly from the Outcomes & Deliverables exhibit for evaluation and reflection.

Close-Out Reports are due 30 days after your project’s grant term end date. Please note that grant funds cannot be spent after the grant term ends. It is recommended that Awardees/Fiscal Agents begin preparing for close-out 60 days prior to the grant term end date. This may include contacting partner organizations for information that will be incorporated into the final Close-Out report.

Slide 23 –Monthly Fiscal Expenditure Reporting *[Divider]*

Monthly Fiscal Expenditure Reporting

This next section will provide an overview of the monthly invoicing process.

Slide 24 – Fiscal (Invoice) Report Submission

H RTP: RWP projects are state-funded and work on a reimbursement system. The Awardee/Fiscal Agent must submit monthly invoices for reimbursement through the Cal-E-Grants system. Monthly invoices are required for all projects regardless of spending activities. If no expenditures are incurred in a particular month, Awardee/Fiscal Agents must still submit a monthly invoice requesting reimbursement for zero dollars.

Invoices are always due on the 20th of the month following the invoicing period. For example, the July monthly invoice would be due August 20th; a December monthly invoice would be due January 20th.

Directions for submitting monthly invoices via the Cal-E-Grants system can be in the H RTP: RWP Grant Administration Guide on the Grantee Portal.

Slide 25 – Fiscal (Invoice) Payment

After the Awardee/Fiscal Agent submits their monthly invoice through the Cal-E-Grants system, the CWDB Program Branch will complete the initial review and approval. Once the invoice is internally approved by the CWDB, it is elevated to the Employment Development Department (EDD) for final check processing. The CWDB will notify grantees of the status of each submitted invoice.

Reimbursement payments are issued within 45 calendar days of the invoice being received, approved, and processed by the EDD. Please note that this 45-day timeline does not account for the time it may take for the physical check to be mailed to your location.

Mailed reimbursement warrants will be sent to the address listed on the Fiscal Agent's STD204 and or STD205. If this address changes throughout the grant term, please notify the CWDB Program Branch via the H RTP inbox immediately to update your form.

Slide 26 – Fiscal Monitoring and Documentation

While the CWDB does not ask for proof of payment with invoices, as mentioned previously, the Fiscal Agent is responsible for all applicable record retention and should keep such invoices for monitoring and auditing purposes.

Any projects that specifically listed leveraged/match funds in their budget exhibits will be required to report on those expended funds during their monthly invoicing.

Slide 27 – Tools & Resources *[Divider]*

Tools & Resources

There are several tools and resources available to you on the H RTP Portal. We encourage you to utilize the resources outlined in the following slides.

Slide 28 – H RTP Grantee Portal

The H RTP Grantee Portal is a private webpage located on the CWDB website that houses the H RTP: RWP Grant Administration Guide, the Data Collection Guide for participant-serving projects, and general grant support resources and forms. Portal information and resources are updated throughout the grant term as needed.

This internal site is accessed via a password for H RTP grantees only. The log-in credentials should only be shared with trusted partners.

Slide 29 – Grant Administration Guide

One of the most important tools at your fingertips is the H RTP: RWP Grant Administration Guide. This resource will provide detailed information for completing reporting and invoicing as well as answer many of your general grant administration and compliance questions. This guide

is available on the HRTP portal and should be read by all staff who are assisting with managing the HRTP: RWP grant.

Slide 30 – Proof of Participation

Proof of Participation

After viewing this orientation, please email a signed self-attestation form to the Program Branch at HRTP@cwdb.ca.gov, affirming you have viewed this orientation video.

Slide 31 – Q&A

If you have any questions, please email them to the HRTP Inbox at HRTP@cwdb.ca.gov.