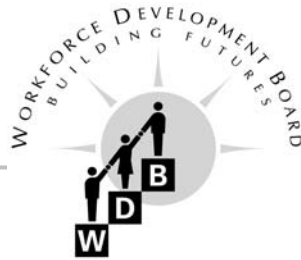


**The DRAFT Local Plan Modification 2007-2008 is available for public comment for a 30 day period starting 11/26/07.**

**There will be a public meeting at 2425 Bisso Lane in Concord on 12/04/07 from 11:00 A.M.-12:00 P.M. for those who wish to make comments.**

**Comments may also be sent by email or regular mail to the attention of Linda Chandler at the address below:**

**Workforce Development Board of Contra Costa County  
2425 Bisso Lane, Suite 100  
Concord, California 94520  
Phone: (925) 646-5239 Fax: (925) 646-5517  
email: [info@wdbccc.com](mailto:info@wdbccc.com)**



**Date:** November 26, 2007

**To:** Workforce Development Board

**From:** Executive Committee

**Subject:** **2007-08 Modifications to Workforce Investment Area Five-Year Strategic Plan**

This report addresses the adoption of modifications to the Workforce Development Board's *Workforce Investment Area Five-Year Strategic Plan*. The modifications are for year eight, fiscal year 2007-08.

## **A. BACKGROUND AND DISCUSSION**

Local Workforce Investment Boards across the State are requested each year by the Workforce Investment Division of the State Employment Development Department (EDD) to provide modifications to their Workforce Investment Area Local Strategic Plans. Because Reauthorization has not occurred, it is understood that should the Act require changes, the local Boards will provide additional changes and information at the direction of the State. This year's Plan must also include local changes that ensure compliance with Senate Bill 293, the State of California authorizing legislation for Workforce Investment.

As was the case in the submission of the original Workforce Investment Area Local Strategic Plan and all subsequent yearly modification, expenditure and budget plans are "informed" projections of what the Board reasonably expects to expend over the next year. The same can be said for participant plan summaries. These are "informed" projections of the number of customers that are targeted to be served. Both expenditure plans and participant plan projections are based largely on the policy desires of the Board and the Program Year 2006-07 experiences of the One-Stop Operator.

## **B. CURRENT SITUATION**

The eighth-year modifications include:

- Significant changes in local economic conditions (e.g., massive layoffs of a major employer), available financing, Board structure, or strategies to meet performance goals; and
- Eighth-year targeted expenditure and budget plan summaries, participant plan summaries and the local performance indicators and goals.
- Addendum questions regarding adjustments based on the Passage of SB293. These questions required policies that address the following:

- Ensuring that training is at the market rate as well as being demand driven in the local area and region;
- Ensuring that the Board is moving toward demand industries and that training aligns with local demand and key industries and high demand occupations;
- Ensuring that those individuals without skills and experience to get a job can go directly to appropriate training and that operations in the One-Stop system is prepared to refer individuals to those types of services and training;
- Ensure that the MOU between the Board and its mandated partners includes reference to the possibility of direct referral to training for identified individuals and that the MOU also includes mention of a referral process among mandated partners within the One-Stop Centers.
- Ensure that the Board is addressing the requirement for 15% labor representation on its Board.

### **C. FISCAL IMPACT**

We must comply with the direction of submitting our yearly modifications to the State. Failure to do so would be seen as non-compliant action and put our funding in jeopardy.

### **D. CUSTOMER IMPACT**

Continued refinement of the *Workforce Investment Area Five-Year Strategic Plan* should result in more effective services to those clients accessing the services of the area's workforce system and ensure the proper deployment of resources to better meet the needs of the various stakeholders within the Contra Costa County Workforce Investment Area.

### **E. SCHEDULE**

The Draft plan posted publicly for a thirty-day review period. Following the public comment period, staff will attach any comments received to the report forwarded on to the Board of Supervisors for approval then on to the State of California.

### **F. ATTACHMENTS**

**D4a – 2007-08 modification to the *Workforce Investment Area Five-Year Strategic Plan***

**D4b – WDB Draft Policy on ITA Market Rate Establishment**

**D4c – WDB Policy on ITA and OJTs**

**D4d – WDB Draft Policy on Direct Training Referrals**

**D4e - MOU Between the Workforce Development Board and its Mandated Partners**

**Workforce Investment Area  
Local Plan Modification  
Program Year 2007–08  
(Budget, Participant, and Performance Forms)**

LWIA: Workforce Board of Contra Costa County

Submitted on: \_\_\_\_\_

Contact Person: Linda Chandler

Contact Person's Telephone Number: 925-646-5024

*EDD is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. Special requests for services, aids, and/or special formats need to be made by calling (916) 654-8055 (Voice) or (916) 654-9820 (TTY).*

WIA Local Plan Modification PY 2007–08

Modification # \_\_\_\_\_ LWIA: Workforce Development Board of Contra Costa Co.

Date: 07/01/2007

## Budget, Participant, and Performance Forms

### Table of Contents

Narrative	REVISION		PAGE NUMBER
	Yes	No	
Executive Summary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	_____
I. Plan Development Process	<input type="checkbox"/>	<input checked="" type="checkbox"/>	_____
II. Local Vision and Goals	<input type="checkbox"/>	<input checked="" type="checkbox"/>	_____
III. Labor Market Analysis	<input type="checkbox"/>	<input checked="" type="checkbox"/>	_____
IV. Leadership	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<u>21</u>
V. One–Stop Service Delivery System	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<u>24,34</u>
VI. Youth Activities	<input type="checkbox"/>	<input type="checkbox"/>	_____
VII. Administrative Requirements	<input type="checkbox"/>	<input type="checkbox"/>	_____
VIII. Assurances	<input type="checkbox"/>	<input type="checkbox"/>	_____
IX. Signature Page	<u>Required</u>		<u>1</u>
<b>Attachments</b>			
1. Budget Plan Summaries	<u>Required</u>		<u>10</u>
2. Participant Plan Summary	<u>Required</u>		<u>13</u>
3. Negotiated Levels of Performance Chart	<u>Required</u>		<u>14</u>
4. Copies of all MOUs for Each One-Stop	<u>Required</u>		<u>16</u>
5. Public Comments of Disagreement	<input type="checkbox"/>	<input type="checkbox"/>	_____

6. LWIA Grant Recipient Listing

Required

58

7. Other Submittal(s)

<input checked="" type="checkbox"/> WIA Local Plan Modification PY 2007-08	
<input type="checkbox"/> Modification # _____	LWIA: Workforce Development Board of Contra Costa Co.
	Date: <u>07/01/2007</u>

**Budget, Participant, and Performance Forms**

**SIGNATURE PAGE**

This Local Plan represents the Contra Costa County \_\_\_\_\_ Workforce Investment Board's efforts to maximize and coordinate resources available under Title I of the Workforce Investment Act (WIA) of 1998.

This Local Plan is submitted for the period of April 1, 2007 through June 30, 2008 in accordance with the provisions of WIA.

Local Workforce Investment Board Chair

Chief Elected Official

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

Rulon McKay  
Name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

Narrative Changes  
Workforce Investment Act (WIA) Strategic Five-Year Plan  
Workforce Development Board of Contra Costa County

IV. LEADERSHIP

The UI Code Section 14202 describes the mandatory composition of Local Boards. The change calls for at least 15% of local board members to be representatives of labor organizations unless the local labor federation fails to nominate members. How will the WDBCCC ensure compliance?

Our Board is comprised of 51% private sector members. In addition, we have all of the mandated partners, community-based organizations, including those that serve veterans and those with disabilities. We have two economic development entities represented, and have added both higher education and K-12. To meet the requirements under Senate Bill 293, we have discussed labor representation with our local Central Labor Council and referrals will be made from that entity. Discussion included the process for nomination, review, and appointment which is consistent with the appointment for all other members of the Board. We presently have two labor representatives.

V. LOCAL ONE-STOP SERVICE DELIVERY SYSTEM

The UI Code Section 19206 describes local board functions, and Section 14206(d) requires the board to “Select one-stop operators, with the agreement of the local chief elected official, annually review their operations, and terminate for cause the eligibility of such operators.” Describe local policy:

- B. The Board of Supervisors approves contracts. Performance data is presented annually. As with all contracts, language is set forth that clarifies expected performance. Should a contractor fail to meet performance, there is termination language in the agreement. The Workforce Development Board would recommend termination for cause based on back-up data and on strong substantiation of all technical assistance provided.

The UI Code Section 14205(h) requires the Local Board to “Develop local policy on the amount and duration of individual training accounts based on market rate for training programs. In addition, the Local Board should have policy on the amount and duration of individual training accounts. Other factors that affect the final decision on individual training accounts may be included.

- F. Staff has attached a draft policy that will augment the existing ITA Policy. This draft sets forth the process for determining labor market rate for training. Attachment: Draft policy and ITA Policy

The UI Code Section 14230(a)(5) states that training services shall be made available to individuals who, among other criteria, “have selected a program of services directly linked to occupations in demand in the local or regional area.” Although Local Boards may focus on training and related services pertaining to demand occupations within that geographic area, WIA funds still may be used for training and related services for occupations located outside the Local Area but in an area to which the job seeker is willing to relocate. What is the Board’s policy?

- R. Staff has attached a draft policy that sets forth how training is presently linked to occupations. Attachment: Draft policy

The UI Code section 14230 describes the services that must be available through California's One Stop Career Centers. Among those services are training services which must be "made available to individuals who have met the requirements for intensive services and who are unable to obtain or retain employment through intensive services." Additionally, each board shall develop a policy for identifying individuals who, because of their skills or experience, should be referred immediately to training services. This policy, along with the methods for referral of individuals between the one-stop operators and the one-stop partners for appropriate services and activities, shall be contained in the memorandum of understanding (MOU), between the local board and its one- stop partners.

- S. Staff has attached a copy of the MOU with two changes. One address the referral policy among mandated partners and the second change addresses the policy for direct referral to training for select individuals. Also attached are copies of the signed addendum to the MOU. Attachments: MOU and signed MOU addendums

✓ WIA Local Plan Modification PY 2007-08

☐ Modification # \_\_\_\_\_

LWIA: Contra Costa County

Date: 07/01/07

**Budget, Participant, and Performance Forms**

**TITLE IB BUDGET PLAN SUMMARY (Adult or Dislocated Worker)**

WIA 118; 20 CFR 661.350(a)(13)

PROGRAM TYPE for PY 2007, beginning 07/01/07 through 06/30/08

☐ Grant Code 201/202/203/204 WIA IB-Adult

☑ Grant Code 501/502/503/504 WIA IB-Dislocated Worker

<b>FUNDING IDENTIFICATION</b>	<b>R7xxxxx Subgrant</b>	<b>R8xxxxx Subgrant</b>
1. Year of Appropriation	2006	2007
2. Formula Allocation	1,997,111	1,694,669
3. Allocation Adjustment - Plus or Minus	0	0
4. Transfers - Plus or Minus	(250,000)	0
5. TOTAL FUNDS AVAILABLE (Line 2 plus 4)	1,747,111	1,694,669
<b>TOTAL ALLOCATION COST CATEGORY PLAN</b>		
6. Program Services (sum of Lines 6A through 6E)	1,572,400	1,525,202
A. Core Self Services	185,503	179,934
B. Core Registration Services	571,512	554,358
C. Intensive Services	470,776	456,645
D. Training Services	277,500	269,171
E. Other	67,109	65,094
7. Administration (Line 5 minus 6)	174,711	169,467
8. TOTAL (Lines 6 plus 7)	1,747,111	1,694,669
<b>QUARTERLY TOTAL EXPENDITURE PLAN (cumulative from July 1, 2006 and July 1, 2007 respectively)</b>		
9. September 2006	0	
10. December 2006	445,942	
11. March 2007	910,006	
12. June 2007	1,366,935	
13. September 2007	1,532,757	0
14. December 2007	1,747,111	234,434
15. March 2008	1,747,111	707,844
16. June 2008	1,747,111	1,164,773
17. September 2008		1,508,635
18. December 2008		1,694,669
19. March 2009		1,694,669
20. June 2009		1,694,669

Jennifer Mitchell, Workforce Svcs Spec 925-646-5630

10/31/2007

Contact Person, Title

Telephone Number

Date Prepared

Comments:

NOTE: Final Rule 667.160, What Reallocation Procedures Must the Governors Use, discusses local area obligation rates, recapture, and reallocation. Also see WIA Directive WIAD01-10.

**WIA Local Plan Modification PY 2007-08**

**Modification #** \_\_\_\_\_

**LWIA:** Contra Costa County

**Date:** 04/01/07

**Budget, Participant, and Performance Forms**

**TITLE IB BUDGET PLAN SUMMARY (Youth)**

WIA 118; 20 CFR 661.350(a)(13)

PROGRAM TYPE for PY 2007, beginning 04/01/07 through 06/30/08

Grant Code 301/302/303/304 WIA IB-Youth

<b>FUNDING IDENTIFICATION</b>	<b>R7xxxxx Subgrant</b>	<b>R8xxxxx Subgrant</b>
1. Year of Appropriation	2006	2007
2. Formula Allocation	1,523,204	1,565,598
3. Allocation Adjustment - Plus or Minus	0	0
4. TOTAL FUNDS AVAILABLE (Line 2 plus 3)	1,523,204	1,565,598
<b>TOTAL ALLOCATION COST CATEGORY PLAN</b>		
5. Program Services (sum of Lines 5A and 5B)	1,505,267	1,409,038
A. In School	889,476	774,971
B. Out-of-School (30%)	615,791	634,067
6. Administration (Line 4 minus 5)	17,937	156,560
7. TOTAL (Line 5 plus 6)	1,523,204	1,565,598
<b>QUARTERLY TOTAL EXPENDITURE PLAN</b> (cumulative from April 1, 2006 and April 1, 2007 respectively)		
8. June 2006	0	
9. September 2006	0	
10. December 2006	0	
11. March 2007	173,352	
12. June 2007	435,955	0
13. September 2007	919,985	0
14. December 2007	1,182,588	0
15. March 2008	1,523,204	154,720
16. June 2008	1,523,204	657,323
17. September 2008		1,057,323
18. December 2008		1,565,698
19. March 2009		1,565,698
20. June 2009		1,565,598

Jennifer Mitchell, Workforce Svcs Spec 925-646-5630

10/31/2007

Contact Person, Title Telephone Number

Date Prepared

**Comments:**

NOTE: Final Rule 667.160, What Reallocation Procedures Must the Governors Use, discusses local area obligation rates, recapture, and reallocation. Also see WIA Directive WIAD01-10.

**WIA Local Plan Modification PY 2007-08**  
 **Modification #** \_\_\_\_\_

**LWIA:** Contra Costa County  
**Date:** 07/01/07

**Budget, Participant, and Performance Forms**  
**TITLE IB PARTICIPANT PLAN SUMMARY**

WIA 118; 20 CFR 661.350(a)(13)

Plan the number of individuals that are in each category.

<b>Totals for PY 2007 (07/01/07 through 06/30/08)</b>	<b>ADULT</b>	<b>DW</b>	<b>OY</b>	<b>YY</b>
1. Registered Participants Carried in from PY 2005	142	128	63	179
2. New Registered Participants for PY 2006	140	150	70	180
3. Total Registered Participants for PY 2006 (Line 1 plus 2)	282	278	133	359
4. Exiters for PY 2006	160	160	50	160
5. Registered Participants Carried Out to PY 2007 (Line 3 minus 4)	122	118	83	199

<b>PROGRAM SERVICES</b>				
6. Core Self Services	4,200	4,500		
7. Core Registered Services	280	275		
8. Intensive Services	250	250		
9. Training Services	150	150		

<b>SKILL ATTAINMENT</b>				
10. Attained a Skill/Goal				131

<b>EXIT STATUS</b>				
11. Entered Employment	125	128	36	15
11A. Training-related	60	75	12	5
11B. Entered Postsecondary/Advanced/Credential Program	10	8	10	
12. Remained with Layoff Employer		5		
13. Entered Military Service				5
14. Entered Advanced Training			10	5
15. Entered Postsecondary Education			10	20
16. Entered Apprenticeship Program				10
17. Attained High School Diploma/GED				80
18. Returned to Secondary School				10
19. Exited for Other Reasons	35	27	5	15

Jennifer Mitchell, Workforce Services Specialist  
 Contact Person, Title

925-646-5630  
 Telephone

10/31/2007  
 Date Prepared

Comments:


WIA Local Plan Modification PY 2007–08

Modification # \_\_\_\_\_ LWIA: Workforce Development Board of Contra Costa County

Date: 07/01/2007

**Budget, Participant, and Performance Forms**  
**STATE NEGOTIATED LEVELS OF PERFORMANCE<sup>1</sup>**

WIA Requirement at Section 136(c)	PY 2000–01	PY 2001–02	PY 2002–03	PY 2003–04	PY 2004–05	PY 2005–06	PY 2006–07
<b>Adults</b>							
Entered Employment Rate	66%	68%	70%	72%	72%	73%	74%
Employment Retention Rate	74%	76%	78%	81%	82%	79%	80%
Earnings Change/Average Earnings <sup>2</sup>	\$3500	\$3600	\$3400	\$3400	\$3450	\$3500	\$11,800
Employment and Credential Attainment Rate	40%	50%	50%	50%	55%	56%	58%
<b>Dislocated Workers</b>							
Entered Employment Rate	68%	69%	70%	79%	79.5%	81%	82%
Employment Retention Rate	81%	83%	85%	88%	88%	85%	86%
Earnings - Replacement Rate/Change/Avg. Earnings <sup>3</sup>	85%	86%	88%	96%	96%	-\$3000	\$15,400
Employment and Credential Attainment Rate	40%	42%	45%	58%	58%	66%	67%
<b>Older Youth (ages 19–21)</b>							
Entered Employment Rate	55%	56%	58%	66%	67%	72%	73%
Employment Retention Rate	70%	72%	74%	76.5%	78%	80%	81%
Earnings Change	\$2500	\$2600	\$2700	\$3000	\$3000	\$3700	\$3800
Employment and Credential Attainment Rate	36%	42%	30%	30%	30%	38%	39%
<b>Younger Youth (ages 14–18)</b>							
Skill Attainment Rate	65%	70%	75%	76%	76.5%	83%	84%
Diploma or Equivalent Rate	40%	42%	45%	55%	55.5%	66%	67%
Retention Rate	40%	42%	45%	53%	53%	63%	64%
<b>Participant Customer Satisfaction Rate</b>	<b>66</b>	<b>67</b>	<b>68</b>	<b>75</b>	<b>75</b>	<b>75</b>	<b>75</b>
<b>Employer Customer Satisfaction Rate</b>	<b>64</b>	<b>65</b>	<b>66</b>	<b>75</b>	<b>75</b>	<b>75</b>	<b>75</b>

<sup>1</sup> Guidance on the definitions of specific indicators for state and local performance can be found at the U.S. Department of Labor [WIA](#) Web site. Specific Training and Employment Guidance Letters (TEGL) include, but are not limited to 17-05, 8-99, 11-01, 22-02, 22-03, 27-04, and 35-04. Additional guidance can be found at the EDD Workforce Development Community [Directives](#) Web site and [Information Bulletins](#) Web site. Specific Directives include, but are not limited to WIAD03-6, 04-10, 05-9, and 05-15. Specific Information Bulletins include, but are not limited to WIAB01-27, 01-55, 02-37, 02-45, 03-43, 03-83, and 05-16.

<sup>2</sup> For PYs 2000-01 through 2005-06, the goal was an “Earnings Change”. Effective July 1, 2006, the definition was changed to reflect an “Average Earnings”. See TEGL 17-05.

<sup>3</sup> For PYs 2000-01 through 2004-05, the goal was an “Earnings Replacement Rate”. For PY 2005-06, the US Department of Labor changed the definition to reflect an “Earnings Change”. Effective July 1, 2006, the definition was changed to reflect an “Average Earnings”. See TEGL 17-05.

WIA Local Plan Modification PY 2007–08

Modification # \_\_\_\_\_ LWIA: **Workforce Development Board of Contra Costa County**

Date: 07/01/2007

## Budget, Participant, and Performance Forms

### LOCAL NEGOTIATED LEVELS OF PERFORMANCE<sup>4</sup>

WIA Requirement at Section 136(c)	PY 2000–01	PY 2001–02	PY 2002–03	PY 2003–04	PY 2004–05	PY 2005–06	PY 2006–07
<b>Adults</b>							
Entered Employment Rate	67%	69%	71%	76%	76%	76%	78%
Employment Retention Rate	77%	79%	81%	82%	82%	79%	80%
Earnings Change/Average Earnings <sup>5</sup>	\$3702	\$2800	\$3666	\$3610	\$3610	\$3680	\$11800
Employment and Credential Attainment Rate	40%	50%	50%	50%	50%	56%	58%
<b>Dislocated Workers</b>							
Entered Employment Rate	73%	74%	75%	80%	80%	80%	80%
Employment Retention Rate	88%	87%	88%	88%	88%	85%	85%
Earnings -Replacement Rate/Change/Avg. Earnings <sup>6</sup>	85%	86%	88%	88%	88%	-\$3000	\$15400
Employment and Credential Attainment Rate	40%	42%	45%	58%	58%	66%	68%
<b>Older Youth (ages 19–21)</b>							
Entered Employment Rate	52%	53%	55%	67%	67%	72%	72%
Employment Retention Rate	66%	70%	71%	77%	77%	77%	79%
Earnings Change	\$2512	\$2600	\$2700	\$3570	\$3570	\$3700	\$3700
Employment and Credential Attainment Rate	36%	42%	30%	30%	30%	38%	35%
<b>Younger Youth (ages 14–18)</b>							
Skill Attainment Rate	68%	73%	79%	77%	77%	82%	82%
Diploma or Equivalent Rate	40%	42%	45%	55%	55%	66%	65%
Retention Rate	42%	44%	47%	50%	50%	60%	62%
<b>Participant Customer Satisfaction Rate</b>							
<b>Employer Customer Satisfaction Rate</b>							

<sup>4</sup> Guidance on the definitions of specific indicators for state and local performance can be found at the U.S. Department of Labor [WIA](#) Web site. Specific Training and Employment Guidance Letters (TEGL) include, but are not limited to, 17-05, 8-99, 11-01, 22-02, 22-03, 27-04, and 35-04. Additional guidance can be found at the EDD Workforce Development Community [Directives](#) Web site and [Information Bulletins](#) Web site. Specific Directives include, but are not limited to, WIAD03-6, 04-10, 05-9, and 05-15. Specific Information Bulletins include, but are not limited to, WIAB01-27, 01-55, 02-37, 02-45, 03-43, 03-83, and 05-16.

<sup>5</sup> For PYs 2000-01 through 2005-06, the goal was an “Earnings Change”. Effective July 1, 2006, the definition was changed to reflect an “Average Earnings”. See TEGL 17-05.

<sup>6</sup> For PYs 2000-01 through 2004-05, the goal was an “Earnings Replacement Rate”. For PY 2005-06, the US Department of Labor changed the definition to reflect an “Earnings Change”. Effective July 1, 2006, the definition was changed to reflect an “Average Earnings”. See TEGL 17-05.

**Budget, Participation, and Performance Forms**

**STATE of CALIFORNIA**

**LOCAL AREA GRANT RECIPIENT LISTING**

[WIA Sections 117(d)(3)(B)(i) and 118(b)(8)]

**WORKFORCE DEVELOPMENT BOARD OF CONTRA COSTA COUNTY**

(Name of Local Workforce Investment Area)

<b>ENTITY</b>	<b>ORGANIZATION</b>	<b>CONTACT (NAME/TITLE)</b>	<b>MAILING ADDRESS (STREET, CITY, ZIP)</b>	<b>TELEPHONE, FAX, E-MAIL</b>
Grant Recipient (or Subrecipient if applicable)	Board of Supervisors, Contra Costa County	Joe Valentine, Director Employment & Human Services Department	40 Douglas Drive Martinez, CA 94553	925-313-1579 jvalentine@ehsd. cccouny.us
Fiscal Agent	CCC Employment & Human Services Dept.	Joe Valentine, Director Employment & Human Services Department	40 Douglas Drive Martinez, CA 94553	925-313-1579 jvalentine@ehsd. cccouny.us
Local Area Administrator	Workforce Development Board of Contra Costa County	Bob Lanter, Executive Director	2425 Bisso Lane, Suite 100 Concord, CA 94520	925-646-5382 blanter@ehsd.cccouny.us
Local Area Administrator Alternate	N/A			

Signature: \_\_\_\_\_

Chief Elected Official

Date

If a Local Grant Subrecipient has been designated, please submit a copy of the agreement between the Chief Elected Official and the Subrecipient. The agreement should delineate roles and responsibilities of each, including signature authority.