

Mass Workforce Issuance

Workforce Issuance No. 06-15

Policy **Information**

To: Chief Elected Officials
Workforce Investment Board Chairs
Workforce Investment Board Directors
Title I Administrators
Career Center Directors
Title I Fiscal Officers
DCS Associate Directors
DCS Field Managers

cc: WIA State Partners

From: Susan V. Lawler, Director
Division of Career Services

Date: March 15, 2006

Subject: Allowable Training Supplies, Materials and Equipment for TAA Customers

Purpose: To transmit policy guidance to Local Workforce Investment Boards, One-Stop Career Center Operators and other local workforce investment partners with respect to allowable TAA Program training-related supplies, materials and equipment and their associated cost limitations. This policy is intended to assist local service providers to avoid disallowed items and costs.

NOTE: This issuance replaces Policy 98-24 Trade Program Allowable Training Materials for Clients (Commonwealth Corporation - 6/26/98).

Background: TAA Program regulations delineated at 20 CFR 617.22 (6) (iii) (A) state:

“Costs of the training program shall include tuition and related expenses (books, tools and academic fees), travel or transportation expenses, and subsistence expenses”.

This policy identifies those items whose purchase costs may be covered with TAA Program funds and describes any specified cost limitations for the purchase of such supplies, materials and equipment that customers must use in order to successfully participate in training programs approved under the TAA Program.

Policy:

The following five (5) categories describe the training-related supplies, materials and equipment, the cost of which may be paid (within any specified limitations) with TAA funds. Only those supplies, materials and equipment *required of all students* participating in the same training program may be covered under the terms of this policy.

1. Textbooks

The full cost of textbooks that *all* students participating in the same training program are required to use. The cost will vary for each program and vendor.

2. Tools

The full cost of those tools required of all students that are *necessary only for participation in the training program*. Tools not needed for training but needed to enter employment *are not allowable*. The cost will vary for each program and vendor.

3. Basic Supplies

Basic Supplies are those items generally needed to participate in training. The following chart offers examples of *Allowable* and *Not Allowed* basic supplies and is not intended to be “all inclusive”.

Allowable Supplies:	Not allowed
<ul style="list-style-type: none"> ▪ Paper ▪ Notepads ▪ Pencils ▪ Pens ▪ Highlighters ▪ Computer disks ▪ Calculator (small, hand-held, desktop) 	<ul style="list-style-type: none"> ▪ Briefcases ▪ Backpacks ▪ PCs/Laptops ▪ Basic Software (i.e. Word, Excel, Outlook, etc.) ▪ Personal items (e.g., envelopes, staplers)

The *maximum* amount that can be approved for basic supplies, materials and equipment for each customer is:

For a training program based on a semester schedule:

- **Thirty dollars (\$30) per semester (full semester)**
- **Fifteen dollars (\$15) per intersession**

Example: If a TAA eligible customer is approved for training classes for the Spring 2006 semester, he/she would be allowed \$30. If that customer were to take classes during both Summer Session I and Summer Session II then he/she would be allowed \$30 (\$15 for Summer Session I and \$15 for Summer Session II). If, however, the customer was scheduled for classes during the Winter Intersession, he/she would be allowed only \$15.

For a training program based on a weekly, non-semester schedule:

- **\$15 for a training program scheduled for 13 weeks, or less.**
- **\$30 for a training program scheduled for 14 to 26 weeks in length.**
- **\$60 for a training program scheduled for 27 to 52 weeks in length.**
- **\$90 for a training program scheduled for 53 to 78 weeks in length.**
- **\$120 for a training program scheduled for 79 to 104 weeks in length.**

For example, if a TAA eligible customer is approved for a 25 week software development training class, he/she would be allowed up to a maximum of \$30 for general supplies. If another TAA eligible customer was approved for a similar software course with a different vendor and the second vendor's class ran for 28 weeks, that customer would be allowed up to \$60 for general supplies.

Please note, however, that these material/supply costs *must be pre-approved* and receipts along with a completed REQUEST FOR REIMBURSEMENT form (Attachment B) *must be submitted* for reimbursement.

4. Uniforms

The full cost of required uniform items such as pants, skirts, dresses, shirts, shoes, etc., that are required of *all* students in order to participate in the training program. The number of uniform items that can be covered with TAA funds will be based on written notification from the training provider of the number of each uniform item required of all students to participate in the program (for example: 2 pants, 2 shirts, 1 jacket).

5. Special Supplies/Equipment

The full cost of special items required of all students to participate in the training program (e.g., scientific calculator for engineering student, CAD software, etc.).

Staff Responsibilities

One-Stop Career Center staff shall make the customer *fully aware* of these allowable items and any associated cost limitations. Staff may also provide TAA eligible customers with a copy of the form: Allowable Supplies and Equipment While in Training form (Attachment A). While use of the form is not mandatory, by completing the form staff will provide both the customer and potential vendors a clearer understanding of allowable cost items as the form provides definitions for each allowable category and also provides the customer's specific pre-approved dollar amount limits for training-related materials and supplies.

Customers, staff and/or vendors who have a question regarding whether or not a training-related item is allowable should contact the DCS Trade Unit (617-626-6007) to obtain clarification.

Customers seeking reimbursement for material purchases already made for which the vendor will not accept a purchase order must submit an itemized list of the items and a completed form: REQUEST FOR REIMBURSEMENT form

(Attachment B) to the DCS Trade Unit. *The submission must also include original receipts.*

If the vendor is invoicing DCS directly, the *vendor must submit* the itemized list of items to the DCS Trade Unit.

DCS will reconcile all requests for reimbursement and invoices against the approved budget in TAARRNEG.

Action

Required: Please assure that all appropriate staff are informed of the content of this issuance.

Effective: Immediately.

References: Trade Act of 1974, as Amended
SESA Issuance 92-27 (12/24/91)
Policy 98-24, Commonwealth Corporation (6/26/98)

Inquiries: Please email all questions to PolicyQA@detma.org. Also, indicate Issuance number and description.