



# Workforce Issuance

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☒ Policy ☐ Information

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**To:** Chief Elected Officials  
MassHire Workforce Board Chairs  
MassHire Workforce Board Directors  
MassHire Career Center Directors  
MassHire Fiscal Officers  
MDCS Operations Managers

**cc:** WIOA State Partners

**From:** Alice Sweeney, Director  
MassHire Department of Career Services

**Date:** November 16, 2020

**Subject:** **FY20 TAA Case Management and Reemployment Funds (Second Allocation) - Local Allocations including Infrastructure Costs and BSR TAA Supported Activities costs per the Workforce Innovation and Opportunity Act (WIOA)**

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**Purpose:** To notify MassHire Workforce Boards, MassHire Career Center Operators and other local workforce partners of the Trade Programs "Employment and Case Management Funds" and infrastructure costs provided for local use under the Trade Adjustment Assistance (TAA) Act. These allocations supplement allocations for WIOA and Wagner-Peyser Employment Service (ES) activities and account for TAA participant activities for workers covered under the Trade Adjustment Assistance (TAA) Programs.

The total cumulative allocation is \$ \$1,629,219.65. Local funding allocations are found in the **Local Area TAA Case Management Allocations Chart** (Attachment A) of this issuance. They are also posted as Attachment 04-108Vc with the WIOA

**Background:** These FY 20 Trade Program “Employment and Case Management” funds have been designated by the Commonwealth for utilization from October 1, 2019 through September 30, 2022 for those individuals being served under the TGAAA of 2009, TAAEA of 2011 and TAARA 2015.

Infrastructure funding is calculated at 5% of the local areas’ allocation.

Case Management Funds (5%) have also been allocated to each local area to support TAA activities of the local Business Service Representatives (BSRs). BSRs can assist with activities related to (this list is not all inclusive):

- Outreach activities to potential TAA employers
- Outreach activities related to potential TAA affected employees
- Filing of TAA Petitions with the MassHire Central Programs Manager
- Assisting Rapid Response with TAA related employee meetings
- Job Development for TAA affected employees
- Vetting and Job Referrals for TAA affected employees

The original allocation methodology continues to be comprised of the following three components:

**A. Petitions Filed and/or Certified**

- weighted 15%
- The number of Trade Adjustment Assistance Petitions certified with USDOL, by area as a percent of share against all MA petitions filed
- Time period: 07/01/2019 to 06/30/2020
- Data Source: MOSES

**B. New Trade Act Participants**

- weighted 35%
- The number of customers approved for TAA benefits per area
- Time period: 07/01/2019 to 06/30/2020
- Source: MOSES

**C. Active Participants**

- weighted 50%
- Customers served during the last 90 days
- Time Period: 07/01/2019 to 06/30/2020
- Source: MOSES

Future increases in allocation will be reviewed and considered based on State funding received.

**Policy:** In addition to covering staffing costs for career counselors, the “employment and case management services” funding may also be used for: assessment tests; skills transferability analysis; peer counselors; development and provision of labor market information; maintenance and enhancement of electronic case management systems to allow for improved case management services; information on available training, including provider performance and cost information; and, any other staff costs related to career services. This list is not intended to be all inclusive.

Local areas are expected to expend these funds quickly and effectively and they are to be used in addition, and not as an offset to any funds the local workforce system receives under WIOA or any other program.

The funds have been made available through a modification of each area’s annual contract with the Executive Office of Labor and Workforce Development (EOLWD). Required expenditure reporting will consist of a **quarterly** Fiscal Status Report (FSR) (Attachment B) to be submitted to Gogo Joe Nwabinwe, at [Gogo.Joe.Nwabinwe@MassMail.State.MA.US](mailto:Gogo.Joe.Nwabinwe@MassMail.State.MA.US) by the 15<sup>th</sup> of the month following the end of the quarter. **Please submit an FSR even if your expenditures are \$0.**

**Action**

**Required:** Please assure that all appropriate staff persons are knowledgeable of the content of this Policy Issuance and that they carry out related TAA activity in a compliant manner.

**Effective:** Immediately.

**Inquiries:** Please direct all inquiries to Beth Goguen at [elizabeth.m.goguen@detma.org](mailto:elizabeth.m.goguen@detma.org). Also, indicate Issuance number and description.

**References:**

- Trade Adjustment Assistance Reauthorization Act of 2015
- Training and Employment Guidance Letter (TEGL) No. 5-15, *Operating Instructions for Implementing the Amendments to the Trade Act of 1974 Enacted by the Trade Adjustment Assistance Reauthorization Act of 2015 (TAA 2015)*
- Workforce Innovation and Opportunity Act

**Attachments:** A: FY2020 TAA Case Management Allocations  
B: TAA Case Management and Reemployment Funds Fiscal Status Report