

# Mass Workforce Issuance

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**Workforce Issuance No. 15-11**

☒ **Policy**   ☐ **Information**

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

**cc:** WIA State Partners

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

**Date:** February 5, 2015

**Subject:** **TAA Case Management Funds: Local Allocations - 3<sup>rd</sup> Allocation**

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**Purpose:** To notify Local Workforce Investment Boards, One-Stop Career Center Operators and other local workforce investment partners of the 3<sup>rd</sup> allocation of Trade Programs “Employment and Case Management Funds” provided for local use under the Trade Adjustment Assistance Act of 2011. These allocations supplement allocations for WIA Title I Adult and Dislocated Worker and Wagner-Peyser Employment Service (ES) activities. The total cumulative allocation is \$316,638.73. Local funding allocations are found in the **Local Area TAA Case Management Allocations Chart** (Attachment A). **Please remember that these funds can only be used to serve those TAA participants that fall under the TGAAA of 2009 and TAAEA of 2011 Acts.**

**Background:** The Trade Programs “Employment and Case Management” funds have been designated by the Commonwealth for utilization between October 1, 2013 and September 30, 2016 for those individuals being served under the TGAAA of 2009 and the TAAEA of 2011 only.

The 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 filed with USDOL, by area as a percent of share against all MA petitions filed
- Time period: 07/1/13 to 12/31/14
- Data Source: MOSES

#### **B. New Trade Act Participants**

- weighted 35%
- The number of customers approved for TAA benefits per area
- Time period: 07/1/13 to 12/31/14
- Source: Quarterly Career Center Performance Reports

#### **C. Active Participants**

- weighted 50%
- Customers served during the last 90 days
- Time Period: 07/1/13 to 12/31/14
- Source: Quarterly Career Center Performance Reports

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 case management. 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 WIA 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 Lisa Caissie at [lcaissie@detma.org](mailto:lcaissie@detma.org) 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 [bgoguen@detma.org](mailto:bgoguen@detma.org). Also, indicate Issuance number and description.

**References:** - Trade Adjustment Assistance Extension Act of 2011  
- TEGL 10-11, Operating Instructions for Implementing the Trade Adjustment Assistance Extension Act of 2011 (TAAEA)

**Attachments:** Attachment A – TAA Case Management Allocations (cumulative)  
Attachment B – TAA Case Management and Reemployment Funds  
Fiscal Status Report