MassWorkforce Issuance

100 DCS 20.101	☑ Policy ☐ Information

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

cc: State Partners

From: Alice Sweeney, Director
Department of Career Services

Date: May 27, 2015

Subject: **TAA Case Management Funds: Local Allocations**

Purpose: To notify Workforce Development Boards, One-Stop Career Center Operators and other local workforce development partners of the 1st allocation of Trade Programs "Employment and Case Management Funds" provided for local use under the Trade Adjustment Assistance Act. These allocations supplement allocations for WIA and the transition into WIOA as of October 1, 2014 and Wagner-Peyser Employment Service (ES) activities. The total cumulative allocation is $138,268.00. 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 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, 2014 and September 30, 2017 for individuals being served under the TGAAA of 2009 and the TAAEA of 2011 <u>only</u>.

The allocation methodology continues to be comprised of 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: 07/01/2013 to 04/30/15
- 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 03/31/15
- Source: Quarterly Career Center Performance Reports

C. Active Participants
- Weighted 50%
- Customers served during the last 90 days
- Time Period: 07/1/13 to 03/31/15
- 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 cost related to case management. This list is not intended to be all inclusive.

Local areas are expected to spend 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, 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.J.Nwabinwe@MassMail.State.MA.US by the 15th 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. Also, indicate Issuance number and description.

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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