

MASSACHUSETTS WORKFORCE DEVELOPMENT SYSTEM

Mass Workforce Issuance

100 DCS 13.104

☒ 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: WIOA State Partners

From: Alice Sweeney, Director
Department of Career Services

Date: December 12, 2016

Subject: TAA Training Materials Allowed

Purpose: To notify Local Workforce Development Boards, One-Stop Career Center Operators and local workforce partners of allowable training supplies, materials, equipment, PCs/laptops and other necessities and the cost limitations associated with their purchase under the Trade Adjustment Assistance (TAA) Program.

Background: The Trade Adjustment Assistance Program for workers was first established by the Trade Act of 1974 and has been amended numerous times. It was first amended by the TAA Reform Act of 2002; then by the Trade and Globalization Adjustment Assistance Act of 2009 and further amended by the Trade Adjustment Assistance Extension Act of 2011. On January 1, 2014 the Sunset Provisions of the Trade Adjustment Assistance Extension Act of 2011 program became effective and are referred to as “Reversion 2014”. The Trade Adjustment Assistance Reauthorization Act of 2015 (TAARA 2015) was signed into law by President Barack Obama on June 29, 2015. TAARA 2015 repeals the sunset provision of the Trade Adjustment Assistance Extension Act of 2011 (TAAEA), under which the Reversion 2014 Program was in effect since January 1, 2014.

Policy: This policy specifically covers supplies, materials and equipment whose purchase costs may be covered with TAA Program funds for all TAA participants and describes any specified cost limitations for the purchase of such items that

customers must use in order to successfully participate in training programs approved under the TAA Program.

The following five 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. Furthermore, TAA will not pay for supplies, materials and/or equipment for classes that are not related to the degree being pursued.

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/Materials

Basic supplies are those items generally needed to participate in training. The following chart offers examples of *Allowable* and *Not Allowable* basic supplies and materials and is not intended to be “all inclusive”. Generally, to approve the cost of basic supplies and materials (or equipment), the cost must be reasonable, the items must be required for the training and individuals attending the training must uniformly be required to pay such costs or obtain such items regardless of the source of funds to cover their cost.

Basic Supplies/Materials

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

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 or other specialized software, PC and/or Laptop, Tools, etc.).

The Commonwealth has also established a maximum cost schedule with regard to the purchase of necessary training supplies and materials and certain special supplies and equipment.

See Attachment A for the established maximum amounts that can be approved and applicable purchase limitations.

Attachment B provides a sample form that can be used by TAA eligible customers when purchasing supplies and other items required of all students participating in the same training program.

These material/supply costs ***must be pre-approved*** and receipts along with a completed REQUEST FOR REIMBURSEMENT form (Attachment C) must be submitted for reimbursement.

Action

Required: Please ensure that all appropriate staff are knowledgeable of the content of this Issuance and that information provided to TAA eligible and potentially eligible customers is consistent with the stated policy.

Effective: Immediately

Attachments: A. Basic Supplies and Materials
B. Guide for TAA Training Materials Allowed
C. Request for Reimbursement Form

References: Trade Adjustment Assistance Act of 1974, as amended
SESA Issuance 92-27, December 24, 1991
The Trade Reform Act of 2002
The Trade and Globalization Adjustment Assistance Act of 2009
Trade Adjustment Assistance (TAA) Extension Act of 2011
The Trade Adjustment Assistance Reauthorization Act of 2015
Trade Regulations, 20 CFR Part 617
TEGL 11-02, Operating Instructions for Implementing the Amendments to the Trade Act of 1974 Enacted by the Trade Act of 2002, issued October 10, 2002 and subsequent changes
TEGL 22-08, Operating Instructions For Implementing the Amendments to the Trade Act of 1974 Enacted by the Trade and Globalization Adjustment Assistance Act of 2009, issued on May 15, 2009

TEGL 10-11: Operating Instructions for Implementing the Amendments to the Trade Act of 1974 Enacted by the Trade Adjustment Assistance Extension Act of 2011 (TAAEA)

TEGL 05-15 Operating Instructions for Implementing the Amendments to the Trade Act of 1974 Enacted by the Trade Adjustment Assistance Reauthorization Act of 2015 (TAARA 2015)

Inquiries: Please email all questions to PolicyQA@MassMail.State.MA.US. Also, indicate Issuance number and description.