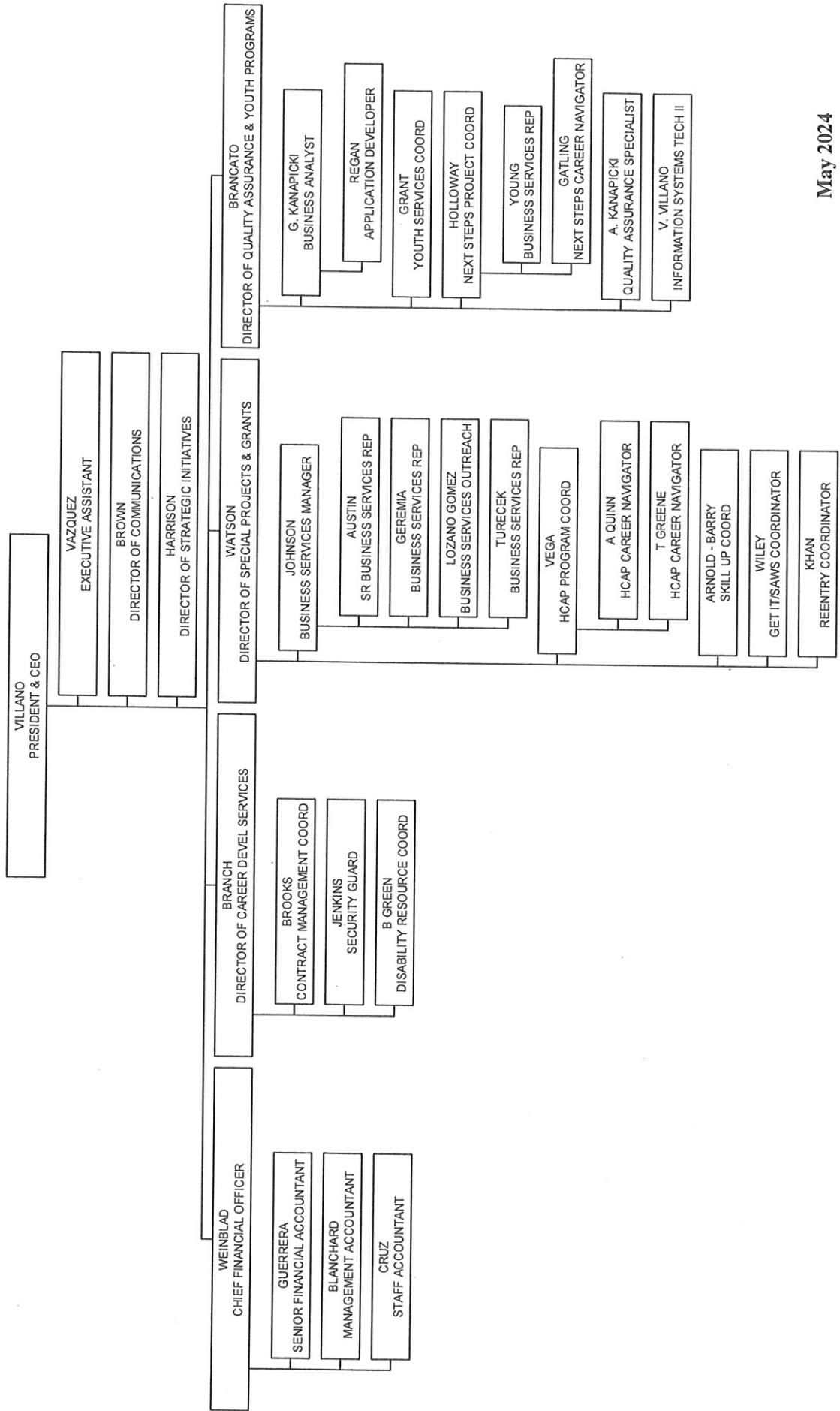


Attachment D

WORKFORCE ALLIANCE ORGANIZATIONAL STRUCTURE



Attachment F

SC Service Delivery Partners Group

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Attachment G

Workforce Alliance Priority of Service

Future Revision Goals

Scoring Considerations

Workforce Alliance will review its 'Priority of Service' scoring standards to consider the following:

- Increase the score of those individuals working in occupations where hours are part-time and/or wages are less than 40% (?) over minimum wage (\$21.97 as of 4/24).
- Increase the score of those individuals currently working in occupations with traditionally high levels of part-time employment, higher than average staff turnover, and limited career pathways/opportunities for growth or promotion.
- Give priority to individuals seeking occupational skills training in 'high demand' occupations and with average wages over 40% (?) of minimum wage.
- Increase the score of individuals with limited transferrable skills for high-demand occupations with livable wages **AND** full-time employment opportunities.

Shift in goals/principles for integration into scoring standards

Our goal is to assure that we provide access and opportunity for the working poor and those in dead-end jobs – EVEN if such jobs are indicated as 'in demand' with high growth projections for jobs.

Typically, individuals who are working in 'high growth' occupations would receive a lower priority of service score. However, in our region, the occupations with the 'highest growth' projections are jobs such as: retail salesclerks & cashiers, food service workers, janitors, laborers, stock people and order fillers. These are *typically* not occupations which provide 'livable' wages, full-time hours with benefits and career pathway opportunities. With that in mind, we need our policy to support such low wage earners and provide a pathway to occupations with more increased/livable wages.

AMERICAN JOB CENTER / SOUTH CENTRAL CT WORKFORCE INVESTMENT AREA
"PRIORITY OF SERVICE" GUIDE FOR INDIVIDUAL TRAINING ACCOUNTS

This guide allows AMERICAN JOB CENTER designated staff to assess and prioritize customers' need for retraining services. Prioritization for services will be determined by selecting the description that most closely reflects the applicants status in each of the four categories below; then adding the points selected from each category for a total number of points. Please select one ranking from each category as appropriate (note 'Target Populations' will be checked only if applicant meets the specified description. A customer's 'priority of service' status will be determined based on the point range categories listed below.

Customer _____ Date _____

AJC assigned staff _____ Office _____

Education Level

- 5 High school Diploma/GED only (no certifications/completion of post-secondary training)
- 3 Technical training/certificate program that is not currently marketable
- 3 Some post-high school education, did not complete degree
- 2 Associate's Degree, Bachelor's Degree or above that is not currently marketable
- 1 Technical training/certificate program that is currently marketable
- 0 Associate's Degree, Bachelor's Degree, or above that is currently marketable

Work History

- 5 Never worked for pay
- 4 Currently unemployed
- 3 Currently working part-time earning less than \$12/hour (PT defined as 29 hrs/week or less)
- 2 Currently working full-time earning less than \$12/hour
- 1 Currently working part-time earning \$12/hour or more
- 0 Currently working full-time earning \$12/hour or more

Marketable Skills

- 5 No transferable skills in current labor market. Occupational category for last job held projected at less than 9% overall Change/job openings.
- 3 Limited skills in current labor market. Occupational category for last job held projected at 10-14% overall Change/job openings (or documented evidence which indicates an additional training credential is necessary in order to maintain/obtain employment in the same industry)
- 0 Transferable skills in current labor market. Occupational category for last job held projected at 15% or greater overall Change/job openings (existing skills/credentials match existing employment opportunities)

*Labor Market projections based on most recent CT Department of Labor, Labor Market Information Research outcomes.

Target Populations

- 1 Test Scores Indicate basic skills deficiency in Reading and/or Math;
- 1 Individual is an English Language Learning/Not proficient in English
- 1 Individual receives public assistance
- 1 Individual with a disability

Total points from all categories

Priority of Service Rating

See current local Workforce Development Board training policy to determine required Priority of Service rating to qualify for Individual Training Account

Veteran's Priority: Veterans and eligible spouses will receive priority of service over non-veterans with the same score/ranking (I.E., if a veteran has a score of 9; and a non-veteran has a score of 9; the veteran will have priority over the non-veteran).

Highest Priority: 9 or more total points: Individuals with total points in this range receive highest priority for retraining services. Customers from this group will be authorized for training services, in conjunction with other eligibility criteria, before customers from the next group are considered.

Low Priority: 5 to 8 total points: Individuals with total points in this range will receive consideration and authorization for retraining services only after funding assistance has been provided to current customers in the "Highest Priority" category.

Lowest Priority: 4 or less total points: Individuals with total points in this range will receive lowest priority for retraining services, and in most cases, customers from this group will not be authorized for retraining services. Exceptions will be made, with One Stop manager approval only, in cases where documentation clearly justifying the need for retraining is attached.

Signatures

AJC Assigned Staff

Date

Supervisor's Signature

Approved Date

Attachment H

WIOA POLICY AND PROCEDURES

*Training Eligibility - WIOA Low Income Adult Exception/Priority of Service
April 2016, Rev April 2024*

Training is not an entitlement service under Workforce Innovation and Opportunity Act (WIOA) or any other South Central American Job Center program. While all participants must meet general eligibility standards, not all eligible applicants are approved for training funding.

Workforce Development Boards have the discretion to develop local policy for determining suitability and the need for comprehensive and training services.

Selection of training programs will be based on the *'customer's choice'* and an individual's unique goals, skills, and background. Training eligible participants may select an approved training program listed on the current Eligible Training Provider List (ETPL). All providers must also have a current Individual Training Account (ITA) contract with Workforce Alliance.

Individualized Career Service Eligibility

Access to individualized comprehensive career services (case management, individualized job search assistance, job development, On-the-job training, transitional employment, and occupational skills training, support services) is based on many factors, including:

1. General WIOA Dislocated Worker & Adult Program Eligibility standards
2. Customer interview, assessment, and evaluation outcomes
3. Priority of Service (based on the individual's residency, income, education, skills and experience; *as with all programs, priority of service will be given to Veterans and eligible spouses of veterans*)
4. Customer career goals and objective
5. Suitability for services available (ability to benefit from and successfully complete program **and obtain training-related employment**)
6. Local area policies, funding, capacity and resources

Local WIOA Low Income Adult Exception Policy

In accordance with local policy, up to 20% of WIOA Adult training allocation and other individualized comprehensive career services may be used to serve individuals who earn 200% or less of the federal Poverty Level.

Priority of Services

A "Priority of Service" form will be completed and income guidelines - 70% of the Lower Living Standard Income Level (LLSIL); or 200% or less of Federal Poverty Level *for up to 20%* of WIOA Adult training funds - will be assessed for WIOA Low Income adults seeking individualized career services, including Job Development and Occupational Skills training assistance. Prioritization of services will be applied in accordance with the results of such assessments. For eligible adults, priority of service will be given to:

1. Veterans or eligible spouses of veterans
2. Individuals who are recipients of public assistance
3. Low Income individuals
4. Individuals who are basic skills deficient
5. Individuals with a Priority of Service score of 9 or higher

Occupational Skills Training Selection

- Training must be in occupations in a Workforce Alliance identified high demand sectors as follows: Health care and Social Assistance; Education and Health services; Professional and Business services; Transportation and Warehousing; Trade, transportation, and utilities.
- Training programs **must** appear on the statewide ETPL **and** result in attainment of a Dept. of Labor recognized credential.
- The program provider must have a current signed ITA contract agreement on file with Workforce Alliance.
- The list of approved/eligible occupational skills training programs is subject to change; Workforce Alliance observes the right to limit the number of ITA's issued or suspend/discontinue programs based on vendor program performance.
- ITA selection *and* approval is based on **customer choice, local labor market demand** ALONG WITH the applicants **specific, unique** circumstances, skills set and background.
- Applicants meeting all specified eligibility criteria for receipt of training may select the ETPL and WDB eligible training program of their choice based on their personal and career development needs.
- As with all programs, priority of service will be given to **veterans** and their eligible spouses.

WORKFORCE ALLIANCE
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www.workforcealliance.biz

LinkedIn:<https://www.linkedin.com/company/workforce-alliance-1-ctworks>

Facebook: <https://www.facebook.com/CTWorks4U>

Twitter: <https://twitter.com/ctworks4u>

CONTRACT FOR SERVICES
TO BE PROVIDED UNDER
INDIVIDUAL TRAINING ACCOUNTS

Provider

Address

City, CT Zip

Contract Date

This agreement is by and between **Provider Name**, hereinafter referred to as the Eligible Training Provider (ETP), and the Workforce Alliance, hereinafter referred to as WA, for the provision of services by the Eligible Training Provider to customers of SOUTH CENTRAL/American Job Center (AJC). This agreement will apply to all training services rendered by the Eligible Training Provider for any period during which training programs are listed on the Workforce Innovation and Opportunity Act (WIOA) Eligible Training Provider List (ETPL).

Clinical and additional Training site

If the program includes a required clinical component or requires participants to attend training at a secondary site as well as the main training site, **WORKFORCE ALLIANCE** will require the applying or approved **ELIGIBLE TRAINING PROVIDER** to submit documentation that includes the name, address, email address, phone and fax numbers of the clinical site, the name and title of the clinical sites administrative contact person, and other documentation, i.e. insurance, zoning, occupational license and etc., to verify the safety and quality of the clinical and or secondary training site and credentials of its staff.

1. **Payments:**

The Eligible Training Provider must invoice the WORKFORCE ALLIANCE Fiscal Department (Attention: Franklin Cruz) within the time specified below of each attainment of each benchmark. If invoices are not received within the allotted time frame, the Eligible Training Providers forfeits the payment for the benchmark, and funding will be re-programmed for other uses. The ITA expiration date displayed on the voucher expires 130 days after the training end date. Workforce Alliance must be in receipt of the ITA invoice (for all benchmarks) prior to the date of expiration. Payment will not be issued after the expiration date, no exceptions. In no case, will total payment exceed \$3,500.00* (Four Thousand, Five Hundred Dollars), except CDL A courses. Payment will be made to the Eligible Training Provider within 30 days of receipt of invoice, and in accordance with the following benchmarks:

- **Enrollment Benchmark** 75% of allowable costs payable upon customer's enrollment into program. Enrollment, for this purpose, is defined as attendance at 3 consecutive class sessions. **Verification of enrollment must be supplied, via the attached "Three Day Enrollment Confirmation Report" form,** with vendor invoice to the Workforce Alliance fiscal department, as well as the American Job Center (AJC) Career Advisor. **Invoice must be received within 30 days of benchmark attainment.** **Failure to submit the invoice as required will result in the forfeiture of payment.**
- **Completion Benchmark** 25% of allowable costs payable upon customer's successful completion of program. **Verification of successful completion of program and credential attainment,** as applicable, must be supplied with vendor invoice to the Workforce Alliance fiscal department, as well as the American Job Center (AJC) Career Advisor. **Credential must be obtained within 90 days of class completion.** A participant shall be considered to have successfully completed his/her training upon receipt of the official credential in accordance with the US Department of Labor definition and the certificate of completion awarded by the Eligible Training Provider. If the provider does not directly issue the credential, the training entity must ensure, facilitate and document that the participants have completed the licensing exams. **If credential is not obtained within 90 days of class completion, the ELIGIBLE TRAINING PROVIDER forfeits the benchmark payment.**
- **Benchmark PAYMENT #3 (Placement in training-related employment) has been REMOVED; however, PROVIDER will still be held to placement outcomes as outlined on page 5 of your contract. Failure to meet placement and/or other performance outcomes may result in suspension or removal from the ETPL.**

Under no circumstances should American Job Center customers be charged out-of-pocket expenses to cover potential revenue losses incurred for failure to attain any of these benchmarks.

In addition to submission of documentation and verification of all payment benchmarks as listed above, it is the **ELIGIBLE TRAINING PROVIDER'S** responsibility to submit regular customer status updates using the "Week Two and Monthly Progress Report" Forms, as attached. Progress reports that are not submitted on time can affect payment of invoice. Other customer status changes that may occur, such as changes to anticipated program start and end dates, program drop outs, program completion and credential attainment, program substitution, employment, etc., must be communicated to the American Job Center (AJC) Career Center Career Advisor within 48 hours of such change occurring. Failure to submit such information may affect payment of invoices.

No payments will be made without proper documentation. All ITA vouchers must be signed by the customer and any appropriate American Job Center and **WORKFORCE ALLIANCE** staff. If an ITA voucher has not been issued, Workforce makes no guarantee of payment. All payments are made based on availability of funding.

*ITA Payment Caps: Total tuition and other fees shall be consistent with and comparable to those of programs of similar content and length. The **WORKFORCE ALLIANCE** reserves the right to cap ITA payments for particular types of occupational training, including:

- **Certified Nursing Assistant and Home Health Aide Programs** at \$1,600.00 (*One thousand, six hundred dollars*). This payment cap is inclusive of all program costs, i.e. tuition, books, exam or licensing fees, etc., but *excludes uniform costs*.
- **Patient Care Technician Programs** at \$3,500.00 (*Three thousand, five hundred dollars*) for programs which include a standard **Certified Nursing Assistant program curriculum and certification** along with, *at a minimum*, phlebotomy and EKG components. Other components, as applicable, may be included. This payment cap is inclusive of all program costs, i.e. tuition, books, exam or licensing fees, etc, but *excludes uniform costs*.
- **Patient Care Technician Programs** at \$3,000.00 (*Three thousand dollars*) which includes only a standard **Patient Care Technician program curriculum** with phlebotomy and EKG components.
- **CDL A Programs** at \$4,500.00 (*Four thousand, five hundred dollars*). This does NOT cover CDL B or similar programs. This payment cap is inclusive of all program costs.

These caps do not impact Eligible Training Providers' total tuition rates. These determinations are based upon tuition charges for similar programs statewide, and/or in the

South-Central Connecticut area. Prior to the issuance of an ITA voucher, all other funding sources must be considered, and, if an institution and/or individual is PELL grant eligible, these funds must be requested and/or utilized first.

The Eligible Training Provider will immediately inform WORKFORCE ALLIANCE of the receipt of any Federal, State or local contracts or grants, including PELL grants that may materially affect the quality or cost of services provided under this agreement.

No new students may be enrolled or ITA vouchers accepted by the Eligible Training Provider after notification of funding termination or removal from the ETPL. The WORKFORCE ALLIANCE is not liable for and will not reimburse any expense for program activity that occurs after the notification of termination.

2. Performance Measurement and CT DOL Subsequent Eligibility:

The Workforce Innovation and Opportunity Act (WIOA) includes certain criteria that must be met in order to ensure that a provider of programs offers the highest quality training services and is responsive to in-demand and emerging industries by providing training services for those industries. In accordance with WIOA regulations and local policies which require evaluation of, and reporting on, vendor programs, WORKFORCE ALLIANCE has established performance standards for individual providers of programs on the ETPL, which is subject to change upon receipt of CT DOL performance report card. All individual programs will be evaluated on a semi-annual basis by WORKFORCE ALLIANCE and annually by CT DOL to determine continued eligibility.

WIOA performance indicators will be determined at a later time. Please note that the performance indicators will be subject to change and will be used for evaluation of subsequent eligibility.

Eligible Training Providers will be responsible for tracking **ALL** participants' performance. The data will be made available to American Job Center (AJC) customers, as well as the general public, in the form of a "report card", that will assist potential program participants in making informed choices and meeting their individual goals.

Performance Standards:

Once WIOA performance measures have been established providers will be held accountable for WIOA performance measures in addition to the following Workforce Alliance performance standards:

- 1) A minimum of (6) six ITA enrollments will be the required number for a complete performance evaluation of each individual vendor program. Upon completion of all the requirements and program components the following minimum standards will be applied in evaluating the performance rate of each program:

- 75% program completion *and* credential attainment rate (a completion is not considered valid without documentation of credential attainment);

and

- 70% placement into full-time (32 hours or more) training-related employment within 120 days of completion of training.

Failure to meet the performance standard will result in ineligibility to receive Workforce Alliance ITA contracts for a period of six months. Such suspension will not result in removal from the ETPL. Re-instatement of Workforce Alliance ITA contracts is contingent upon corrective action plan determined in conjunction with Workforce Alliance.

Upon reinstatement to Workforce Alliance ITA contracts, a provider would have to reapply as a new provider. Provider will be limited to enrolling a maximum of 5 ITA participants until such time as they meet required performance standards. WORKFORCE ALLIANCE reserves the rights to review reinstated eligible training provider performances on a quarterly bases to determine WORKFORCE ALLIANCE ITA contract continuance, corrective action or removal from the ETPL.

Tracking:

The Eligible Training Provider must ensure that accurate and complete follow-up documentation for all students as well as ITA recipients is completed. WIOA ITA recipient's documentation should be submitted to the appropriate American Job Center Career Advisor, in accordance with the Progress Report forms attached, as well as the following:

- Updates on customer activity status, within 20 calendar days of projected completion date
- Updates on customer employment status, upon training completion, within 90 calendar days of completion
- Updates on customer status within both the second and fourth quarters after program completion.

Removal of programs from the ETPL

The Workforce Alliance reserves the right to remove programs from the ETPL for any of the following reasons:

1. Reasons for Removal.

- WDBs or CTDOL may remove a program if the provider fails to provide all the data required for subsequent eligibility determination within the required timeframes.
- WDBs or CTDOL shall remove a program at any point at which it is determined that the program does not meet the minimum criteria for initial listing specified in this procedure.
- A WDB or CTDOL shall remove a program if, as a result of the subsequent eligibility determination process, the program has not met the minimum levels of performance set by the state or by the WDB.
- CTDOL shall remove a program if it determines after consultation with the WDB involved, that the applying entity intentionally supplied inaccurate information.
- WDBs or CTDOL may remove a program if the provider is found to have substantially violated any WIOA requirements.

2. If a WDB removes a program from the ETPL, the WDB must, within 10 business days of its decision, inform the ETP & CTDOL in writing and include the reason(s) for the denial and provide information on the appeals process.

3. If the CTDOL removes a program from the ETPL, CTDOL shall inform the provider in writing and include the reason(s) for the denial and provide information on the appeals process. In addition, CTDOL must inform the Local Board where the ETP applied of the denial and the reason(s) for the denial.

Removal from the ETPL:

At any time, the Eligible Training Provider may be removed from the ETPL at the request of the authorized agent of the entity. If the Eligible Training Provider requests the removal of one or more programs from the ETPL, a one year waiting period will be imposed prior to reconsideration of the program. The Eligible Training Provider will be required to resubmit a new application for any program for which consideration is requested. Furthermore, no mandated reporting requirements will be waived, regardless of whether or not the program is currently on the list; an Eligible Training Provider's obligation to provide performance measurement data begins immediately upon inclusion on the ETPL.

The Workforce Alliance reserves the right to remove an Eligible Training Provider from the ETPL for any of the following reasons:

- Failure to provide information for the calculation of performance measures for both Workforce Alliance and CT Department of Labor;
- Failure to meet one or more performance standards;
- Fraud or other non-compliance issues;
- Evidence of financial insolvency (balance sheets, publication on a tax scofflaw list, filing for bankruptcy or financial organization, etc.);
- Allegations of illegal or unethical behavior, pending disposition of the charges;
- Conviction of a serious crime by any principal employed by an Eligible Training Provider;
- Tuition and other fees which are inconsistent with those charged to the general public;
- Local and/or statewide changes in occupations in demand;
- Inappropriate conduct, or egregious behavior, by an agent of the Eligible Training Provider; and
- Any allegation deemed serious enough to affect the performance of the Eligible Training Provider and cause harm to a customer.

The Workforce Alliance, in conjunction with the appropriate State agencies, shall investigate all complaints and allegations, by customers, employers and other interested parties. In the event that it is necessary to remove an Eligible Training Provider from the ETPL, the Workforce Alliance will notify the contact person prior to removal. The Eligible Training Provider will be provided with a detailed explanation of the reason for removal and will be presented with the appeal procedure.

If an Eligible Training Provider is removed from the ETPL by either the Workforce Alliance or a State agency, eligibility to receive funds will be terminated for a period of at least 2 (two) years. Subsequent to this period, the Eligible Training Provider may submit a new application for inclusion on the statewide list.

Prior to approval for inclusion on the ETPL the eligible training provider has to complete a corrective action plan and submit to Workforce Alliance along with WIOA ETP application for approval. At the time of reinstatement vendor will be limited to enrolling a maximum of 5 ITA participants for a period of 2 years but no less than 1 year.

Assurances:

The Eligible Training Provider will perform its duties in accordance with the Workforce Innovation and Opportunity Act of 2014 (WIOA) and the regulations, procedures and standards thereunder. The Eligible Training Provider will comply with all applicable Federal, State and local laws, rules and regulations which deal with, or relate to, the training of

persons eligible to receive benefits under WIOA, Welfare to Work (WTW) or Temporary Assistance to Needy Families (TANF). Failure to comply with any of these regulations or refusal to accept additional conditions imposed by either the funding source or Workforce Alliance may result in termination of this agreement.

In accordance with Federal (Title VI of the Civil Rights Act of 1964) and State laws, the Eligible Training Provider shall in no way discriminate against, deny employment to, or exclude from participation any persons on the basis of the following: race, color, national origin, religion, gender, sexual orientation, age, marital status, handicap or political affiliation or belief. Additionally, the Eligible Training Provider must post these rights in areas where they will be readily visible to all program participants and employees. The Eligible Training Provider shall provide Workforce Alliance with all material relevant to participant selection practices and procedures.

The Eligible Training Provider shall comply with all requirements of OSHA, Davis-Bacon Act, Worker's Compensation, Unemployment Insurance, Fair Labor Standards Act, and shall inform Workforce Alliance of any violation. The Eligible Training Provider will maintain a safe work and/or training environment, and any violation cited by the Workforce Alliance, the State of Connecticut or the United States Government is cause for immediate removal from the ETPL.

The Eligible Training Provider shall comply with all requirements of the Americans with Disabilities Act of 1990. All training sites must be handicapped accessible and reasonable accommodations shall be made to ensure access to all training programs by individuals with mental and physical disabilities.

The Eligible Training Provider will establish safeguards to prohibit employees from using their positions for a purpose that is, or gives the appearance of, being motivated by desire for private gain for themselves, or others, particularly those with whom they have family, business or other ties. This includes assurance that student referrals will originate from the American Job Center (AJC) objective assessment process and not from the Eligible Training Provider.

The Eligible Training Provider will not charge participants a fee for acceptance into a training program or job placement.

The Eligible Training Provider will ensure that all staff with whom clients will be in contact will possess a minimum of 2 years relevant experience, particularly those individuals hired in the capacity of program instructors and case managers.

The Eligible Training Provider will maintain the confidentiality of any information regarding applicants, students or their families that may be obtained through application forms, interviews, tests, reports from public agencies or counselors, or any other source. Without

written authorization from the applicant or student, such information will be divulged only to the extent necessary to measure the performance of the Eligible Training Provider.

The Eligible Training Provider will fulfill any and all existing Workforce Alliance training contracts in the same occupation before accepting the ITA voucher as a source of training funds.

The Eligible Training Provider will develop a procedure for hearing and resolving grievances and complaints from students and use this procedure before bringing the matter to the attention of the Workforce Alliance. If the matter is not resolved by the Eligible Training Provider's grievance procedure, the Eligible Training Provider will use the Workforce Alliance's Complaint Resolution Procedure and abide by the Workforce Alliance's final determinations. Additionally, the Eligible Training Provider will designate an individual to address issues immediately as they arise. This individual must be trained in conflict resolution and capable of de-escalating potentially volatile situations. No participant may be suspended or terminated from the program without first discussing the issue with appropriate American Job Center (AJC) and/or Case Management staff. The Eligible Training Provider must make all reasonable attempts to resolve participant issues prior to the consideration of suspension and/or termination from the program. The Eligible Training Provider must inform appropriate American Job Center (AJC) and/or Case Management staff of all action taken throughout the conflict resolution process.

The Eligible Training Provider will maintain a minimum of \$1,000,000.00 (One Million Dollars) liability insurance coverage during any time period when the Eligible Training Provider is included on the ETPL. Written documentation must be presented to the Workforce Alliance.

The Eligible Training Provider will assume liability for its actions and the actions of its agents and Sub Training Providers in all matters pertaining to the provision of training and related services. The Eligible Training Provider will hold harmless, defend and indemnify Workforce Alliance, American Job Center, the funding source and their directors, officers, agents, representatives and/or employees from liability of any nature or kind. This liability includes, but is not limited to, costs and expenses for, or on account, of any suits or damages of any character whatsoever, resulting from injuries or damages sustained by any persons or property, resulting in whole or in part from the negligent performance or omission of any employee, agent, representative or trainee of the Eligible Training Provider.

Financial Safeguards, Records and Requirements:

The Eligible Training Provider will possess and maintain adequate administrative and accounting controls, personnel standards and evaluation procedures to ensure the protection of State and Federal funds against fraud and abuse of any nature and to ensure the effective use of those funds.

The Eligible Training Provider must provide the following as a condition of inclusion on the ETPL:

1. Student Handbook
2. All financial aid and loan policies and payment agreement documents

All such documents will be attached to and considered parts of this contract.

The Eligible Training Provider will prohibit the engagement of, and use of WIOA, TANF or WTW funds for sectarian and political activities at the training site.

The Eligible Training Provider will carry an Employee Fidelity Bond on every officer, director, agent, Sub Training Provider or employee authorized by the Eligible Training Provider to receive or deposit funds into program accounts or issue financial statements, checks or other instruments of payment for program costs. This bond must be provided to Workforce Alliance upon request and shall be for no less than \$50,000.00 (Fifty Thousand Dollars). This bond must remain in effect for any period of time during which the Eligible Training Provider is included on the ETPL.

If, after exhausting all available federal, state and local sources of financial aid, the Eligible Training Provider enters into a contractual agreement, or extends a promissory note to the recipient of an ITA voucher, the APR cannot exceed 12% and payments must be deferred for a period of 6 months from the date of program completion. Only tuition and other required program fees can be covered by any financial agreements made with the recipient of ITAs under this contract. Additionally, if the Eligible Training Provider declares bankruptcy or financial reorganization, the balance due and owing will be forgiven.

The Eligible Training Provider must provide an auditor's statement, or, in the event that no audit has yet been conducted, a notarized statement from a Certified Public Accountant detailing all assets and liabilities. The Eligible Training Provider must demonstrate financial solvency as a condition of inclusion on the ETPL.

The Eligible Training Provider will grant access to any books, documents, papers or records pertaining to all training programs, for which approval has been granted, to the Workforce Alliance, the Comptroller General of the United States, the US Department of Labor, the State of Connecticut or any of their duly authorized representatives. All records shall be retained for 5 (five) years after participant completion or until all audits of WIOA, WTW or TANF fund usage have been settled, if such settlements exceed a period of 5 (five) years. Access to all records must be available during normal business hours. Should the Eligible Training Provider cease to operate in the South Central Workforce Investment Area, or cease to operate entirely, the Eligible Training Provider shall turn over all program and fiscal documents and records to the Workforce Alliance or a mutually agreed upon party.

The Eligible Training Provider shall be liable to the Workforce Alliance and agrees to repay the Workforce Alliance for any unauthorized costs expended in the operation of the program and for any disallowed costs identified through a monitoring visit or an audit of the Eligible Training Provider's program, or as a result of the Eligible Training Provider expending funds in violation of appropriate federal or state statutes, regulations or guidelines, or other regulations or guidelines, as set forth by this agreement.

The Eligible Training Provider will utilize the funds realized through an ITA voucher solely for tuition and other program-related costs. These funds shall not be applied to the purchase of equipment or supplies that will not be utilized solely by program participants. The Eligible Training Provider will maintain a property inventory indexed by description, model, serial number and location for any equipment purchased. Additionally, these funds shall not be applied to the purchase of property, or to renovation or repairs of the training facility.

The Eligible Training Provider will furnish immediately upon request any records deemed necessary by the Workforce Alliance and/or Federal or State agencies and authorities for purposes of performance measurement. These records may include, but are not limited to: student names; the names of parents or other family members; student and/or student's family's address; a personal identifier (such as the student's social security number or student number); personal characteristics, or other information that would make the student's identity easily traceable; application materials; attendance records; grade reports; customer comments and complaints; completion rates and job placement and retention files. The Eligible Training Provider acknowledges: that this information will be used to compile a Customer Report Card; that aggregate data will be made available to all prospective students; and that the information requested by the Workforce Alliance and/or Federal or State agencies may pertain to all program enrollees, including those who are not ITA recipients. The Eligible Training Provider further acknowledges that poor performance in the areas of program completion, job placement or job retention may adversely affect the number of potential referrals, and/or may result in removal from the ETPL.

The Eligible Training Provider acknowledges that the sole purpose of training is the engagement of the participant in gainful employment and will ensure that the participant receives appropriate assistance in securing full-time employment. All available resources shall be accessible to program participants. If the Eligible Training Provider is unable to secure full-time employment for the participant, in a position for which he has received training, within 120 days, the designated placement individual will consult with American Job Center staff for placement assistance. The Eligible Training Provider will provide the Workforce Alliance and American Job Center staff with documentation of placement assistance and retention information. For placement and retention purposes, the Eligible Training Provider will assist the Workforce Alliance and American Job Center staff in the employment verification process and such assistance includes, but is not limited to, the acquisition of participant paystubs, or other employer-generated payroll records, as

documentation that a participant is actively engaged in full-time (as defined above) employment.

We hereby affix our signatures to this Agreement in good faith and agree to the terms outlined herein:

FOR THE ELIGIBLE TRAINING PROVIDER

FOR THE WORKFORCE ALLIANCE

William P. Villano, President/CEO

Date

Date

ATTACHMENTS

- TRAINING EXPENSE FORM
- ITA COURSE EXPLANATION FORM
- COORDINATION OF BENEFITS
- THREE DAY ENROLLMENT CONFIRMATION REPORT FORM
- WEEK TWO TRAINING PROGRESS REPORT FORM
- MONTHLY TRAINING PROGRESS REPORT FORM
- PLACEMENT INFORMATION FORM
- MODIFICATION REQUEST FORM
- CONTRACTS/PROGRAM CONTACT INFORMATION

South Central American Job Center Training Expense Form

Customer Name: _____

Job Seeker Consultant: _____

New Haven Fax: (203) 867-8720
 Meriden Fax: (203)238-2841
 Middletown Fax: (860)788-2214
 (Fax completed form to assigned Career Advisor)

PROGRAM INFORMATION

Vendor Name: _____ Training Program: _____

Start Date: _____ End Date: _____

Schedule	Mon	Tues	Wed	Thurs	Fri	Sat
Start Time						
End Time						

PLEASE INDICATE ALL COSTS ASSOCIATED WITH PROGRAM

Expense Category	Actual Cost	Due Date	* Payee	Special Issues
Tuition				
Application Fee				
Books				
Uniform				
Equipment				
Lab Fees				
Test/Exam Fees				
Other:				
Other:				
Other:				

** indicate if payment should be issued to training vendor, uniform shop, book store, etc.*

Payment: All ITA payments will be made according to the following schedule:

- Payment 1: 75% upon customer's enrollment into program (3 consecutive classes)
- Payment 2: 25% upon customer's completion of program (verified credential)

Customer is accepted into the program: _____
 Training Representative Signature _____ Date _____

**Individual Training Account (ITA)
 Course load Explanation**

Course Name <i>(Please list courses in order of sequence)</i>	# Credits or Hours, as applicable to program	Semester/Year <i>(I.E. fall or spring/ year)</i>
Total (please indicate total credits or hours required for degree or certificate)		

Please copy & attach additional forms to document required courses as needed

- Participant will be enrolled as a Part-Time Student
- Participant will be enrolled as a Full-Time Student

Program Completion Date (for full course of study): _____

I understand that any change/deviation from dates, expenses and course load requires formal approval from WA.

Training Representative Signature

Date

SOUTH CENTRAL AMERICAN JOB CENTER
One-Stop Career Center

COORDINATION OF BENEFITS

To receive funds for training, you will be required to meet with the financial aid officer of training institution regarding other potential sources of funding.

In the event that you are eligible for funds from other non-WIOA sources, the amount of your Individual Training Account from South Central American Job Center will be reduced accordingly.

These sources include, but are not limited to:

(Indicate areas of eligibility)

_____ Pell Grant

_____ Veteran Tuition Waiver

_____ Veteran Education Benefits

_____ Senior Tuition Waiver

_____ Employer/Union Educational Assistance

_____ Other (Please Specify) _____

Signature of Trainee

Date

Signature of School Representative

Date

School

Phone Number

Training Program Title

THREE DAY ENROLLMENT CONFIRMATION REPORT
10/02

TO:		FROM:		
<hr/> Assigned Job Seeker Consultant New Haven Fax: (203) 867-8720 Meriden Fax: (203) 238-2841 Middletown Fax: (860) 788-2114		<hr/> (Vendor/Instructor)		
RE:	FOR	Date of Class	Date of	Date of
(Name of Student)	THREE	1:	Class 2:	Class 3:
	DAY			
	PERIOD:			
COURSE:				
Course in which student is enrolled:				
<hr/>				
ANY COMMENTS REGARDING PROGRESSION IN TRAINING:				
SIGNATURE OF OFFICER OR INSTRUCTOR IN CHARGE:				
<hr/>		<hr/>		
(Signature)		(Date)		
<hr/>				
(Print Name)				

Submit to American Job Center Job Seeker Consultant and
a copy to Workforce Alliance Fiscal Department with initial invoice.

MONTHLY TRAINING PROGRESS REPORT

(10/02)

TO: Assigned Job Seeker Consultant New Haven Fax: (203) 867-8720 Meriden Fax: (203) 238-2841 Middletown Fax: (860) 788-2214		FROM: (Vendor/Instructor)
RE: (Name of Student)	FOR MONTH OF:	
COURSE: Course in which student is enrolled: _____		
Progress in Training: (Check only one) Excellent Good Fair Poor	Cooperation in Training (Check only one) Excellent Good Fair Poor	Difficulties in Training: (Please Describe)
SIGNATURE OF OFFICER OR INSTRUCTOR IN CHARGE: _____ (Signature) _____ (Date) _____ (Print Name)		

Submit to American Job Center Job Seeker Consultant

Workforce Alliance Contract for Service 1.31.24

Individual Training Account Vendor Placement Information Form

TRAINING INFORMATION

Participant Name: _____

Training Vendor Name: _____

Training Program: _____

Training Start Date: _____ Training End Date: _____

Did participant successfully complete the program? () Yes () No

If yes, did participant successfully attain a program credential, license or certificate? () Yes () No

EMPLOYMENT INFORMATION

Employer Name: _____

Employer's Address: _____

Employer's Phone: _____

Job Title: _____ Start Date: _____

Wage: _____ # of hours per week: _____

Does participant receive benefits? () Yes () No

Is placement Training related? () Yes () No

Comments: _____

Training Provider Signature

Date

**South Central American Job Center
Individual Training Account Plan Modification Request**

1. Participant Name:	Participant ID:
2. Original ITA Contract # <u>(REQUIRED FIELD)</u> :	
3. Vendor:	Program:
4. Start Date: End Date: () 1 st Modification Request () 2 nd Modification Request	

5. The following plan modification is requested:

- ITA Cancelled. Reason: _____
- Change in Training *Start Date*: **From** _____ **To** _____
- Change in Training *End Date*: **From** _____ **To** _____
- Change in Training *Amount*: **From** \$ _____ **To** \$ _____
- A new/additional training plan, as follows:
- Participant terminated training *unsuccessfully*. Termination date: _____
(Please indicate termination explanation/status reason in section #2 below)

- Other terms and conditions as follows:

6. Please provide an explanation for the above modification request:

Terms of request have been agreed to by:

Provider Authorized Signature: _____ Date: _____

Print Name: _____ Title: _____

Participant Signature: _____ Date: _____

Job Seeker Consultant: _____ Date: _____

Manager of Program Operations : _____ Date: _____

FOR OFFICE USE ONLY	
Training Plan Modification Request has been: <input type="checkbox"/> Approved <input type="checkbox"/> Denied	
_____ <i>Workforce Alliance Authorized Signature</i>	_____ <i>Date</i>

Contract/Program Contacts

1. Workforce Alliance Contacts

a. Contract Questions/Issues

Name: Andrea Kanapicki

Title: Quality Assurance Specialist

Email: akanapicki@workforcealliance.biz

Phone: (203) 867-4030 ext. 241

Mailing Address: 370 James Street Suite 401
New Haven, CT 06513

b. Fiscal Questions/Issues

Name: Franklin Cruz

Title: Staff Accountant

Email: fcruz@workforcealliance.biz

Phone: (203) 867-4030 ext. 257

Mailing Address: 370 James Street Suite 401
New Haven, CT 06513

Attachment I

South Central WIOA Youth Policy and Procedure

Youth Requires Additional Assistance to Enter or Complete an Educational Program or to Secure or Hold Employment

Workforce Alliance has established the following ten (10) criteria as barriers that shall qualify youth as eligible for WIOA Title I services should at least one be documented in addition to **low income** requirement:

- Chronic truancy
- Scoring below grade level on the CT Mastery Test
- Retain in grade level
- Chronic pattern of disciplinary problems
- Suspension or expulsion from school
- Substance abuse history – self or family
- Poor work history (out of school only)
- History of neglect and/or abuse – self or family
- Educationally at-risk
- Transportation needs

At time of WIOA Youth eligibility determination/intake, Workforce Alliance staff may accept documentation from applicant or service provider substantiating one of the aforementioned criteria/barrier(s). Documentation may include but is not limited to the following:

- Letter from school official (administrator, counselor, instructor, etc.)
- Letter or other official document from physician, psychologist, etc.
- Letter or other official document from social service agency, educational entity, state agency
- School records
- Attendance records
- Applicant, staff and/or service provider attestation (transportation needs – bus tokens, bus passes, gas cards)

In addition to the documentation mentioned above staff will also have Workforce Alliance “Youth Requires Additional Assistance” form completed. Appropriate form and documentation shall be placed within applicant/participant file folder.

Youth Service Priority

Priority for services shall be given to recipients of public assistance and low-income individuals consistent with the Workforce Innovation and Opportunity Act.

WIOA Section 3 (36) defines a Low-Income individual as an individual who:

- (a) receives, or in the past six (6) months has received, or is a member of a family that is receiving or in the past six (6) months has received, assistance through SNAP, cash payments under a Federal, State, or local income-based public assistance program such as TANF (Temporary Assistance for Needy Families), SSI (Supplemental Security Income), General Assistance (GA) or Refugee Cash Assistance (RCA);
- (b) received an income, or is a member of a family that received a total family income, for the 6-month period prior to application for the program involved. including unemployment compensation and child support payments, cash public assistance, and old-age and survivors insurance benefits under the Social Security Act that, in relation to family size, does not exceed the higher of (I) the poverty line, for an equivalent period; or (II) 70 percent of the lower living standard income level, for an equivalent period (see Federal Poverty Levels (FPLs) and Lower Living Standard Income Levels (LLSILs) included in this section as a hyperlink;
- (c) receives or is eligible to receive a free or reduced price lunch under the Richard B. Russell National School Lunch Act;
- (d) qualifies as a homeless child or youth individual as defined under section 725(2) of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a(2))the Steward B. McKinney Homeless Assistance Act;
- (e) is an individual with a disability whose own income meets the requirements of a program described in subparagraph (a) or (b), but who is a member of a family whose income does not meet such requirements.
- (f) is a youth in foster care on behalf of whom State or local government payments are made.

Individuals who are recipients of public assistance (TANF, SNAP/Food Stamps, Supplemental Security Income (SSI), Refugee Cash Assistance (RCA), and General Assistance (GA)) may meet Categorical Income Eligibility and considered automatically income eligible and no further income verification is required if the individual has provided acceptable documentation.

- (a) SNAP (Food Stamp) documentation must be current and verify that the individual receives or is a member of a household that is receiving SNAP benefits as described in 1. (c). Examples of documentation include the Letter of Award if the individual is the recipient, or documentation that lists the individual is a member of the household receiving SNAP, and documentation such

as a SNAP benefit summary showing the dates to verify that benefits were received within the six-month period prior to application to a WIOA program.

(b) Cash Public Assistance:

(1) TANF documentation must be current and verify that the individual receives or in the past six (6) months has received TANF payments, or is a member of a family that is receiving or in the past six (6) months has received TANF payments. Examples of acceptable documentation include the Letter of Award if the individual is the recipient, or documentation that lists the individual as a member of the family currently receiving TANF, and documentation such as the TANF benefit summary that shows the dates of the public assistance. Refer to the appropriate Verification Worksheet for complete list of acceptable documentation.

(2) SSI, RCA and GA are payments made to a single recipient. The individual applying to WIOA must be the recipient and must be currently receiving SSI, RCA or GA in order to be considered as receiving public assistance and would be considered as a family of one. Examples of acceptable documentation include the Award Letter or other authorization notice to receive cash public assistance.

Free or Reduced Lunch: The individual must be an in-school youth at the time of enrollment. If the youth is attending a school that provides free lunch to all students then the youth is considered to be receiving free lunch. Verification documentation for free or reduced lunch eligibility must be current or, in the case of youth enrolling during the summer, verify that the lunch eligibility was determined no more than one year (or previous school year) prior to WIOA eligibility determination.

Note: Some school districts subsidize all student meals from the Community Eligibility Provision (CEP) Healthy, Hunger Free Kids act of 2010. When a school does not collect individual eligibility for free or reduced or lunch the information may not be used to determine lowincome eligibility.

Veterans' Priority for Service. Covered Persons' Priority: Refer to Section C. of WIOA 3.10 Adult and Dislocated Worker and the Glossary for further clarification of covered persons and priority for service.

