

**TOC/OWA Policy & Guidance  
In Support of Integrated Services Delivery  
October 1, 2008**

**Policy guidance for OWA consideration at the 10/16/2008 meeting**

**SELF-SUFFICIENCY - Policy Change**

**Action:** OWA adoption of the recommended self-sufficiency policy.

**References:**

- **WIA section 134(d)(3)(A)(ii)**
- **WIA section 101(24)**
- **WIA regulations 20 CFR part 663.230**
- **OWIB policy statement, June 27, 2008 agenda**

**Background:** Under section 134 of the Workforce Investment Act (WIA) and part 663.230 of the final WIA regulations, State or Local workforce investment boards must set the criteria for determining whether employment leads to self-sufficiency. At minimum such policy must provide that self-sufficiency means employment that pays at least the lower level standard income level, as defined in WIA section 101(24).

**Policy Statement:** As provided for under the Workforce Investment Act of 1998 and congruent with the self-sufficiency policy statement approved at the June 27, 2008 meeting of the State of Oregon Workforce Investment Board, staff is recommending that the Oregon Workforce Alliance adopt the following program guidance for determination of self-sufficiency:

*“Employment itself is not a guarantee of self-sufficiency. Due to the ever-increasing skill requirements of employment at all levels, all Oregonians can benefit from increased skills. Therefore no Oregonian seeking assistance through WorkSource Oregon shall be considered to be self-sufficient.”*

**Discussion:** Adoption of this policy guidance by the OWA will support and facilitate the provision of services for all employed workers by expanding the population of current workers eligible for skills enhancement services.

## **PRIORITIZATION - Policy Change**

**Action:** OWA revocation of current OWA Prioritization policy.

### **References:**

- **WIA section 134(d)(4)(E)**
- **WIA section 101(25)**
- **TEGL 22-04 change 1, Serving Military Service Members and Military Spouses under the WIA Dislocated Worker Formula Grant**

**Background:** Section 134(d)(4)(E) of the Workforce Investment Act (WIA) requires that in the event that funds available under the WIA Title 1-B Adult Employment and Training Program are limited, priority of shall be given to recipients of public assistance and other low-income individuals for intensive services and training services as defined in WIA section 101(25). In any event, the US Department of Labor through the issuance of Training and Employment Guidance Letter 22-04 (TEGL 22-04) has directed that veterans and Military spouses receive priority of service.

**Policy Statement:** As provided for under the Workforce Investment Act of 1998 and in order to assure that the broadest possible WIA 1B eligible population has access to services supporting skills enhancements and employment in occupations providing for or leading to self-sufficiency and the availability of a skilled workforce for business, staff is recommending that the Oregon Workforce Alliance revoke the existing OWA approved prioritization policy.

**Discussion:** This action will eliminate the need to require customers to qualify for program services based on income. The elimination of needs-based-testing will stream-line eligibility processes and will assure that adult and dislocated workers qualify for the entire range of available services. This action will free staff resources currently dedicated to eligibility testing and will expand staff resources available to deliver intensive staff, skills enhancement and training services. As required by USDOL guidance, Veterans and Military spouses will continue to receive prioritization for services.

## **SCHOLARSHIP AWARD CRITERIA**

**Action:** OWA establishment of a Scholarship Program and adoption of the recommended scholarship award criteria.

**References:**

- **CCWD Policy 589-20.4 Employer Workforce Training Funds**
- **OWA PY07 Strategic Plan**

**Background:** This action by the Oregon Workforce Alliance (OWA) will implement a local area wide scholarship process and establish consistent minimum award criteria for the regions while providing regional flexibility to determine the best focus for the award of scholarships and training opportunities based on regional economic factors and business needs.

**Scholarship Award Criteria:** Under this program each of the TOC regions will establish and maintain a scholarship program supporting the achievement of skills enhancement funded by WIA 1B or EWTF resources as appropriate to applicant eligibility, the requirements of each funding stream, and funding availability.

All such scholarships shall recognize the program's relationship to The Oregon Consortium & Oregon Workforce Alliance by at minimum including the TOC/OWA logo on written documents including the application and/or other information.

At minimum the criteria for the award of a scholarship will consider:

- a. The connection between the employment goal of the applicant and regionally targeted high demand, high skill or high wage occupations or strategic emerging industries identified within the regional investment plan;  
OR
- b. The connection between the employment goal of the applicant and a career pathway leading to self-sufficiency;  
AND
- c. The connection between the training requested and the employment goal or career pathway of the applicant;  
AND
- d. Whether the applicant is willing to relocate to find employment if the employment goal of the applicant does not relate to a high demand, growth or wage occupation within the region;  
AND

- e. Whether the applicant has sufficient resources to successfully complete the training program, including PELL and other sources of financial aid or resources;  
AND
- f. The availability of resources to fund the scholarship.

**Discussion:** These criteria represent the OWA minimums, and regions may at their option add additional factors to their regional scholarship award criteria and selection processes. All regions currently have scholarship processes in place. The adoption of standard scholarship award criteria policy continues these regional initiatives while supporting the OWA strategic goal and EWTF requirement for a focus on high demand, growth and wage occupations within each region.

Under the scholarship process training funds may be awarded through a scholarship application process to eligible adult, dislocated worker, incumbent worker and youth. Scholarships may be funded by WIA formula or other available grant funds including employer workforce training funds (EWTF) made available to the local workforce investment boards through the Governor's Executive Order #03-16 and distributed to the 9 workforce regions of The Oregon Consortium (TOC).