

North Central Workforce Development Area

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LOCAL DIRECTIVE

Directive #: 22-179 Revision 1 <u>Date: July 1, 2023</u>
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TO: North Central WDA EcSA Service Providers

FROM: Lisa Romine, Executive Director

SUBJECT: Incentive Payments for State Funded EcSA Participants

Supersedes: Local Directive 22-179

Summary of changes in this update:

1. Added the EcSA Monthly Plan & Progress Report tracking requirement for incentives as part of the customized career plan
 2. Updated reference to state policy, WIN 0129, Change 2
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This directive sets forth procedures for award of incentive payments for participants enrolled in, and making satisfactory progress in, state-funded Economic Security for All (EcSA) activities and programs. Guidance for state-funded EcSA programs is found in [WIN 0129, Change 2](#).

State-funded EcSA participants are eligible to receive a \$500 incentive per month while enrolled in training (including regularly scheduled academic breaks or while awaiting training start date). The annual cap for state-funded EcSA training incentives is set at \$6,000 per participant, not to exceed \$500 per month. This will incentivize retention in training and/or education, to defray expenses which might deter retention or training success, and to assist in nearing income adequacy. Exceptions or increases to these amounts may be approved by the Executive Director.

All state-funded EcSA participants enrolled in a training or education activity will develop a customized career plan with their trainer/career counselor. The [EcSA Monthly Plan & Progress Report](#) must be included with the customized career plan to track the minimum expectations to earn a monthly incentive which include but are not limited to:

- Meet at least monthly with their trainer to monitor their progress in training.
- Meet satisfactory progress in training or education activities as defined in their customized career plan for each month of enrollment. If on academic break (i.e. summer quarter), incentives may still be earned based on what is outlined in their career plan. Trainers will indicate in customer career plan what benchmarks or activities are expected during academic breaks. This will be recorded in monthly progress reports in the activity touchpoint via case note.

- Complete additional monthly EcSA activities outlined in their customized career plan/Individual Employment Plan.

Monthly progress reports in the ETO (or replacement database) training activity touchpoint will indicate whether a state-funded EcSA participant received an incentive payment, and if not, the reasons for not receiving an incentive payment in a given month.

These training incentives may **only** be awarded to State-Funded EcSA participants for progress in training or education activities. They may **not** be awarded to participants enrolled in WIOA programs or activities, to include Federal EcSA, unless they are co-enrolled in State-Funded EcSA and meeting training plan expectations. If co-enrolled, the training or education activity may be funded by either WIOA or state-funded EcSA.

State-funded EcSA participants will be asked to sign an acknowledgement form (Attachment 1) detailing the incentive program while developing their training plan with their trainer. The trainer will complete and submit the monthly performance report (Attachment 2) and submit to their manager for processing.

NOTE: Incentive payments are considered taxable non-wage related income. Ten percent (10%) will be withheld for federal income tax and a 1099-MISC form will be sent to participants at year end. Participants will need to complete a W-9 before incentive payments are made.

Earn up to \$6,000 Incentives for Learning Achievement!

State EcSA Incentive Agreement Form

Incentives are awarded for Academic **Achievement and Progress**.

To **qualify** for an Incentive, you must:

1. Meet at least monthly with your trainer to review your training progress.
2. Meet satisfactory progress in training or education activities as defined in your customized career plan for each month of enrollment.
3. Complete activities outlined in customized career plan expected during academic breaks.
4. Complete additional monthly activities outlined in your customized career plan

Payments

If a student meets the above criteria, they may earn up to a total of \$6,000 per year, for academic achievement including (but not limited to) the completion of a degree or certificate, and satisfactory academic progress towards completion of a degree or certificate.

Incentive Amounts:

\$500 per month for meeting four (4) requirements outlined above (maximum \$6,000 per year).

Important note: Incentives are considered taxable non-wage related income. Ten percent (10%) will be withheld for federal income tax and a 1099-MISC form will be sent to you at year end by SkillSource.

I, _____ *agree to the above mentioned Incentive Guidelines.*

Participant Signature _____ Date _____

Trainer Signature _____ Date _____

STATE EcSA MONTHLY PERFORMANCE REPORT & ACADEMIC INCENTIVE PAYMENT

Participant: _____ CMS # _____

Program of Enrollment: STATE FUNDED EcSA _____ Up to 200% _____ Above 200% _____

Participant Address _____ City _____ Zip Code _____

3	Excellent	Consistently meets or exceeds classroom/workplace standards
2	Good	Consistently meets classroom/workplace standards
1	Needs Improvement	Needs to work on meeting this standard
0	Unacceptable	Action recommended
N	Not Rated	Unable to rate on this standard
PARTICIPATION:		30-day enrollment satisfactorily met?
State-Funded EcSA Enrollment Date: _____		Yes _____ No _____
WIOA Enrollment Date (if applicable): _____		
MONTHLY PROGRESS MEETING		Satisfactorily met?
Met with trainer to discuss academic/training progress		Yes _____ No _____
MEETING SATISFACTORY PROGRESS		Satisfactorily met?
As detailed in customized training plan and training provider policy		Yes _____ No _____
ACADEMIC BREAK ACTIVITIES		Satisfactorily met?
Participated in special activities during academic breaks (if applicable)		Yes _____ No _____ NA ____
ADDITIONAL MONTHLY ACTIVITIES		Satisfactorily met?
Participated in other activities outlined in training plan (if applicable)		Yes _____ No _____ NA ____
INCENTIVE EARNED		Comments:
<input type="checkbox"/> Satisfactory monthly progress in training/education (\$500)		
		TOTAL AMOUNT EARNED: \$ _____

Participant _____ Date _____ Trainer _____

Instructor _____ Date _____ Manager _____

EcSA Enrollment Date:

Monthly Meeting Date	Program Activity (ie: ITA or other training)	Academic Break Activities (if applicable)	Additional Monthly Activities (if applicable)	Satisfactory Progress Met & Incentive Earned	Comments
		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	