

# North Central Workforce Development Area

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## LOCAL DIRECTIVE

Directive #: 22-179 Rev 3      Date: July 1, 2024

TO: North Central Service Providers

FROM: Lisa Romine, CEO

SUBJECT: State EcSA and Community Reinvestment Incentives

Supersedes: Local Directive 22-179 Rev 2

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### Summary of changes in this update:

- Incorporates Community Reinvestment Fund incentives
- Expands incentives to include activities beyond vocational education to include on-the-job training, workforce preparation, and employment retention.

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### Incentive Payments:

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 [State Policy 7000](#); guidance for the EcSA Community Reinvestment Fund is found in [State Policy 7005](#).

- Participants eligible for and enrolled in State EcSA may receive cash incentives as outlined in their individual employment plans. These incentives may be funded either through State EcSA, the Community Reinvestment Fund (CRF) or both.
- If using CRF, the monthly incentive is awarded at \$1000. State EcSA incentives may be awarded monthly for \$500 or \$1000/month depending on the training activity and individual employment plan.
- A participant enrolled in State EcSA may receive incentives from either/or both funds.
- Participants must be enrolled and/or participating in one of the following activities and outlined in their Individual Employment Plans to be eligible for incentives:
  - Occupational Skills Training
  - On-the-Job Training
  - Workforce Preparation (up to 6 months)
  - Employment Retention (up to 90 days post-employment)
- Incentives may be awarded for progress on participants' customized career plans during regularly scheduled academic breaks or while awaiting training start date.

**Procedure:**

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 Incentive Plan & Progress Tracker](#) 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 Career Counselor to monitor their progress in training.
- Meet satisfactory progress in 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 their career plan.
- Retention for up to 90 days following entered employment.
- Complete additional monthly EcSA activities outlined in their customized career plan/Individual Employment Plan.

Trainers will indicate in the customized career plan what benchmarks or activities are expected during academic breaks or while awaiting training or during job search following training. This will be recorded in monthly progress reports in the activity touchpoint via case note.

**MIS/Data Entry**

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. State-funded EcSA incentives and CRF incentives will be recorded using the State Funded Services touchpoint and the State-Funded Financial Support Payments service (for State EcSA) or Community Reinvestment Financial Support Payments service (for CRF). The method of payment (check or debit card) must be documented in the TP.

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

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 approval and 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 Incentives for Learning Achievements!

## State EcSA & CRF Incentive Agreement Form

Incentives are awarded for **Training Plan Achievement and Progress**.

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

1. Meet at least monthly with your Career Counselor 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 the incentives for academic achievement and satisfactory progress as outlined in their customized career plan (**Attached**) towards completion of a degree, certificate, on-the-job training, workforce preparation and/or employment retention.

**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-stated Incentive Guidelines.*

Participant Signature \_\_\_\_\_ Date \_\_\_\_\_

Trainer Signature \_\_\_\_\_ Date \_\_\_\_\_

# STATE EcSA & CRF MONTHLY PERFORMANCE REPORT & ACADEMIC INCENTIVE PAYMENT

Participant: \_\_\_\_\_ CMS # \_\_\_\_\_

Program of Enrollment: CRF \_\_\_\_\_ State EcSA Under 200% \_\_\_\_\_ State EcSA Above 200% \_\_\_\_\_

Participant Address \_\_\_\_\_ City \_\_\_\_\_ Zip Code \_\_\_\_\_

<b>ACTIVITY:</b> <input type="checkbox"/> Voc Ed/ITA <input type="checkbox"/> OJT <input type="checkbox"/> Workforce Prep <input type="checkbox"/> Academic Break <input type="checkbox"/> Employment Retention	
<b>PARTICIPATION:</b> State-Funded EcSA Enrollment Date: _____ WIOA Enrollment Date (if applicable): _____	
<b>MONTHLY PROGRESS MEETING</b> Met with trainer to discuss academic/training progress	Satisfactorily met? Yes _____ No _____
<b>MEETING SATISFACTORY PROGRESS</b> As detailed in customized training plan and training provider policy	Satisfactorily met? Yes _____ No _____
<b>ACADEMIC BREAK ACTIVITIES</b> Participated in special activities during academic breaks (if applicable)	Satisfactorily met? Yes _____ No _____ NA ___
<b>ADDITIONAL MONTHLY ACTIVITIES</b> Participated in other activities outlined in training plan (if applicable)	Satisfactorily met? Yes _____ No _____ NA ___
<b>EMPLOYMENT RETENTION</b> Monthly incentive for employment retention for up to 90 days following entered employment.	Satisfactorily met? Yes _____ No _____ NA ___
<b>INCENTIVE EARNED:</b> <input type="checkbox"/> Satisfactory monthly progress toward career plan for the month of _____.	Comments: <div style="border: 1px solid black; padding: 10px; margin-top: 10px; text-align: center;"> <b>TOTAL AMOUNT EARNED:</b>             \$ _____         </div>

Participant \_\_\_\_\_ Date \_\_\_\_\_ Trainer \_\_\_\_\_

Manager \_\_\_\_\_

