



WS 23-05
Issued: September 28, 2023
Effective: October 1, 2023
Financial Aid
Expires: Continuing

To: All Contractors

From: Juliet Stipeche
Aaron Sturgeon
Kevin Rodney

Subject: Financial Aid Standards and Guidelines

Purpose

To consolidate and update Workforce Solutions' financial aid standards and guidelines.

This issuance replaces:

- WS 14-04 Managing Financial Aid/Continued Funding released April 22, 2014.
- WS 15-11 Managing Financial Aid/Changes to Education and Training Related Expenses;
- WS 15-12 Initial Guidance Regarding the Workforce Innovation and Opportunity Act released June 30, 2015;
- WS 17-06 Managing Financial Aid released October 30, 2020;
- WS 20-05 Work Addendum – Revised released December 02, 2020; and
- WS 20-07 Managing Financial Aid – Online Financial Aid Application released January 15, 2021.

Background

We provide financial aid to assist our customers in entering the workforce for the first time, going back to work, continuing to work, or advancing in a career. Customers must meet eligibility requirements for one or more of Workforce Solutions' fund sources: Supplemental Nutrition Assistance Program Employment & Training (SNAP E&T), Temporary Assistance for Needy Families/Choices (TANF/Choices) Workforce Innovation and Opportunity Act (WIOA) Adult, Dislocated Worker, Youth (In-School and Out-of-School) Trade Adjustment Assistance (TAA), and Special Projects and Initiatives.

Staff must determine customers eligible for **all** funding streams for which they qualify.

Who Can Receive Financial Aid

We offer financial aid to customers who need help to:

- Continue working,
- Obtain and complete education or training to go to work, or
- Accept a job or get a promotion.

Before arranging any type of financial aid, Workforce Solutions staff must complete a thorough assessment of a customer's needs which may include, but not limited to:

- specific barriers to employment,
- living arrangements and expenses,
- educational level,
- work experience,
- job skills, and
- career interests.

Through the assessment, staff must determine the services and resources necessary and appropriate to help the customer get a job, keep a job, or get a better job. Staff must work with the customer to explore other community resources to meet their need: [2-1-1 Texas/United Way Helpline](#) and [Texas Assistance and Aid Programs](#). In some instances, staff may determine Workforce Solutions is the best option to help the customer meet their need which may depend on:

- ease of access,
- timeliness of service,
- availability of funds, and
- other factors that may affect the customer's ability to start or maintain employment.

Kinds of Financial Aid We Offer

We have two broad groups of financial aid: short-term assistance and substantial assistance.

1. We offer short-term assistance when it will help a customer go to work quickly or keep an existing job. Short-term assistance is one-time in a twelve-month period, and provided to customers who:
 - a. have received a job offer and need assistance to start work, or
 - b. are currently working and need assistance to maintain employment.

The job must last more than 30 days; and the employer must verify employment and the need for assistance.

If a customer has received any short-term assistance in the past twelve months and requests additional financial aid, staff must follow the guidelines for substantial assistance. Staff should determine the twelve-month period by looking at short-term financial aid provided any time in the twelve months prior to the date the customer is currently requesting short-term assistance.

2. We offer substantial assistance when we determine a customer has longer-term needs to attain their employment goals. We work with the customer to create an employment plan, maintain an extended relationship to provide career planning and exploration, provide job leads, and/or help to complete an educational or training program.

Substantial assistance may be more than one time, occur over months or years, and be related to different customer needs.

Financial Aid Types

Our financial aid types include:

- **Work Support** – assistance to help customers accept a job offer or keep a job,
- **Work Search Support** – assistance to help customers look for work, and
- **Education Support** – assistance to help customers obtain education or training to meet the expectations of employers in our region.

Availability of Funds

- **Priority of Service**

When the supply of Workforce Solutions funds is greater than the demand, Workforce Solutions offers financial aid to eligible customers on a first-come, first-served basis. Staff must identify priority criteria for all eligible customers and document this information in case notes. Refer to [WS 18-09 Financial Aid Priority Criteria](#) for the complete list of priority groups.

When the demand for Workforce Solutions financial aid is greater than the supply, eligible customers are placed on a scholarship registry. As funds become available, financial aid is offered to customers using their priority criteria and the date of the request.

- **Fund Alert**

We issue a [Fund Alert](#) to communicate important information about the availability of financial aid to the Workforce Solutions system. The alert provides a status of the available funds for financial aid, and the average time to determine eligibility. Workforce Solutions staff should use this information to advise customers and create a plan to determine the assistance they need based on the availability of funds.

Action

1. Make sure staff read and understand the [Financial Aid Standards and Guidelines](#) which provide procedures for staff to support this issuance.

Questions

Staff should ask questions first of their supervisors. Direct questions to the Board staff at workforcepolicy@wrksolutions.net.