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| WS 23-05 Change 1 |
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To: All Service Providers

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Subject: Financial Aid Standards and Guidelines

Purpose

To update Workforce Solutions' financial aid standards and guidelines.

Revisions

WS 23-05 Financial Aid Standards and Guidelines released September 28, 2023

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/or Special Projects and Initiatives.

Policy

1. When working with a customer interested in financial aid, staff must follow the procedures outlined in the [Financial Aid Standards and Guidelines](#).
2. 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.

3. 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, increase their earnings or get a better job. Staff must work with the customer to explore other community resources to meet their immediate needs: [2-1-1 Texas/United Way Helpline](#) and [Texas Assistance and Aid Programs](#). If the customer needs more intensive support, staff must assist them with completing the intake and eligibility process, which may take up to two weeks.

4. Staff must assess customers to determine all applicable funding sources for which they may qualify.
5. 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.

Staff must refer to the [Financial Aid Limits by Type of Assistance](#) for a list of items we cover by category and their corresponding limits.

6. 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.
7. We communicate important information about the availability of financial aid to the Workforce Solutions system via the [Fund Alert](#). Workforce Solutions staff must use this information to advise customers and create a plan to determine the assistance they need based on the availability of funds.
8. When the demand for Workforce Solutions financial aid is greater than the supply, eligible customers are placed on a financial aid registry. As funds become available, financial aid is offered to customers using their priority criteria and the date of the request.

Action

1. All staff must read and apply the [Financial Aid Standards and Guidelines](#) when assisting customers interested in financial aid.
2. Service provider management must ensure that they train and equip all staff with the necessary knowledge to assist customers interested in financial aid.
3. Service provider senior management are responsible for actively monitoring and ensuring staff adhere to the procedures outlined in the standards and guidelines.

References

1. Texas Workforce Commission's [Workforce Innovation and Opportunity Act \(WIOA\) Program Guide](#) effective March 18, 2024
2. [WD 33-07, Change 1 Training Services Information in WorkInTexas.com – Update](#)
3. [WD 07-17, Change 1 Local Workforce Development Board Transportation Policies to Safeguard against the Misuse of Funds – Update](#)
4. [WD 01-20, Change 3 Managing Reportable Individuals and Participants in the Wagner-Peyser and Jobs for Veterans State Grant Programs in WorkInTexas.com – Update](#)
5. [WD 06-13, Change 2 Documenting Services and Participant Contact in WorkInTexas.com Case Notes – Update](#)
6. [WD 38-09, Change 1 Reporting Occupations Connected to Training Activities in WorkInTexas.com – Update](#)

Questions

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