

AREA 8 WORKFORCE DEVELOPMENT BOARD
Workforce Innovation and Opportunity Act

Policy number	250
Subject	Self-Sufficiency Policy
Ohio WIOA Policies addressed	WIOA -15-09
May apply for waiver	NA
Board approved	8/16/18
Effective date	8/1/18
Replaces	7/01/09 Self-Sufficiency Policy

I. Purpose.

The purpose of this policy is to outline the requirements for determining self-sufficiency.

II. Effective Date.

8/1/2018

III. Background.

Pursuant to section 134 (b)(3)(A)(i)(I) of WIOA, for adults and dislocated workers to receive training services, they must be in need of such service to obtain or retain employment that allows for economic self-sufficiency. In other words, in order for an individual to be eligible for certain training services, s/he when applying must not already be self-sufficient and must be seeking training in a good faith effort to become self-sufficient. Pursuant to the terms and conditions set forth below, individuals must not be self-sufficient in order to be eligible for all training, or certain types of training. The Workforce Area sets the criteria for determining self-sufficiency. This policy sets forth the terms, conditions, and criteria pursuant to which “self-sufficiency” and “family self-sufficiency” shall be defined, and when and how the same shall be determined by Area 8.

The Area 8 Board establishes the Federal Poverty Level Guideline to determine if a WIOA applicant or participant meets the definition of a low-income individual. In-school youth -- and out-of-school youth with certain barriers defined in WIOA -- must be low-income individuals (except for up to five percent of the youth otherwise required to be low-income individuals who may be served by the local area even though they are not low-income.)

IV. Criteria

- A. There are no additional eligibility criteria for the adult program (see policy 500 Area 8). However, **priority** for career and training services funded by and provided through the adult program shall be given to recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient for receipt of those career services determined appropriate to obtain or retain employment.

B. For purposes of youth program eligibility and adult service priority, individuals meet the definition of low-income if their family income does not exceed the Federal Poverty Level Guideline Poverty Line

A. Definitions

Dependent: an applicant who falls in any one of the following categories:

- Under 18 years of age, living with parents or guardians, and is receiving support from them; or
- Age 18-24 and parent(s) or guardian(s) pay(s) for more than 50% of the applicant's support.

Independent: an applicant who falls into any one of the categories below:

- Under 18 years of age, not living with parents or guardians, and is not receiving any support from them;
- Individuals, age 18-24, providing more than 50% of their own support;
- Age 25 or older;
- Married (including separated, but not divorced);
- Has children that receive more than half of their support from the applicant;
- Has dependents other than a spouse or children who live with the applicant and receive more than half of their support from the applicant;
- Lives in own residence or in a residence without financial or other support from parents or guardians;
- Is on active duty in the U.S. armed forces for purposes other than training; or
- A veteran of the U.S. armed forces.

Support: as it relates to dependent, financial assistance from parents or guardians to help pay for food, clothing, shelter, utilities, education, medical and dental care, recreation, transportation, and any other living expenses; as well as government-provided cash public assistance and food assistance.

Self-sufficiency:

The Area 8 Board establishes the criteria for self-sufficiency income for customers of Adult services at **200% of the Federal Poverty Level Guideline**. Please note that review of self-sufficiency is not an eligibility criterion. Priority must be given to recipients of public assistance, other low-income individuals, individuals who are basic skills deficient, and Veterans. WIOA training services may be provided to adults or dislocated workers who after an interview, evaluation, or assessment and career planning, have been determined to be:

1. Unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services;
2. In need of training services to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment; and
3. Have the skills and qualifications to successfully participate in the selected program of training services.

Dislocated Workers who have received notice of layoff but have not yet been laid off and who do not have any other sources of employment will not be subject to review of self-sufficiency as defined by WIOA.

Family Income

Family Income is defined as the total includable **income of an individual or a family for the 30-day period prior to application for the program.** Please reference WIOA law and eligibility guidelines for the definition of “Family.”

Family Income shall INCLUDE:

1. Wages and salaries before any deductions, including wages earned while in OJT, on reserve duty in the Armed Forces, and severance pay
2. Net receipts from non-farm self-employment- receipts from a person’s own unincorporated business, professional enterprise, or partnership after deductions for business expenses
3. Net receipts from farm self-employment- receipts from a farm which one operates as an owner, renter, or sharecropper, after deductions for farm operating expenses
4. Regular payments from pension and retirement systems including private, government, railroad, and military retirement pay
5. Regular payments from Social Security Disability Insurance (SSDI)
6. Strike benefits from union funds
7. Worker’s Compensation
8. Training stipends
9. Alimony
10. Child Support
11. Unemployment Compensation (UC)
12. Regular support from an absent family member or someone not living in the household
13. Military family allotments
14. Regular insurance or annuity payments

15. Old age and survivors insurance benefits received under Title II of the Social Security Act (Adult and Dislocated Worker programs only)

16. College or university grants, fellowships, and assistantships (other than needs-based scholarships) 17. Dividends and interest

18. Net rental income

19. Net royalties and/or periodic receipts from estates and trusts

20. Net gambling or lottery winnings

Family Income Excludes:

1. Cash payments under a Federal, State, or local income based public assistance program such as:

a. Ohio Works First (OWF) cash payments

b. Prevention, Retention, and Contingency (PRC)

c. Disability Assistance d. Refugee Cash Assistance 2. Supplemental Security Income (SSI) from the Social Security Administration (SSA)

3. Need-based scholarship assistance and financial assistance under Title IV of the Higher Education Act (i.e. Pell Grants, Federal Supplemental Educational Opportunity Grants, and Federal Work Study. Stafford loans and Perkins loans, like any other kind of loan are debts and not income)

4. Pay and allowances received under U.S.C. Titles 37 and 38, pay and allowances received while serving on active military duty, compensation for service-connected disability, compensation for service-connected death, vocational rehabilitation, education assistance, and active duty pay for reservists called to active military duty

5. Capital gains

6. Any assets drawn down as withdrawals from bank, sale of property, a house or a car

7. Tax refunds, gifts, loans, lump- sum inheritances, onetime insurance payments, or compensation for injury

8. Non-cash benefits such as employer paid fringe benefits, food or housing received in lieu of wages, Medicare, Medicaid, SNAP benefits, school meals, fuel, or other housing assistance

9. Wages earned by WIOA participants while in WIOA programs (except OJT participants)

3. Unemployed Dislocated Workers.

No family self-sufficiency or self-sufficiency determination needs to be made.

4. All Employed Dislocated Workers.

For working dislocated workers, the determination of economic self-sufficiency requires a two-step assessment of the worker's employment see WIOAPL 15-09.1 (Training Services for Adults and Dislocated Workers).

VI. Monitoring.

The Area will conduct oversight and monitoring of the implementation of all Area Workforce programming by all OMJ Center operators, partners, and/or providers.

VII. Technical Assistance.

Office of Workforce Development: WIAQNA@jfs.ohio.gov;

VIII. References.

- Workforce Innovation and Opportunity Act, Public Law 113-128.
- Section 134 (b)(3)(A)(i)(I) of WIOA

Date: 8/16/2018 -Executive Committee _____

Motion made by: Rob Radway _____

Motion seconded by: Michelle Steinke _____

Vote 4 aye 0 nay 0 abstain X motion carries motion rejected