



Tulsa Area Workforce Development Board, Inc.

Proudly serving Creek, Osage, Pawnee and Tulsa Counties in Oklahoma

Incentive Policy

Board Approved: 02/16/2017

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This presentation was financed in whole or part by funds from the US Department of Labor as administered by the Oklahoma Employment Security Commission.*

Incentive Policy Changes Overview

Most Recent Policy Changes:

Board Approval: 02 16 2017
Executive Committee Approval: 01 30 2017
Oversight Committee Approval: 01 30 2017
Youth Committee Approval: 01 12 2017

Reason: Update policy to reflect new authority under Workforce Innovation and Opportunity Act of 2014 (WIOA) and Oklahoma Workforce Development Issuance-02-2016 WIOA Youth Policy Revised FINAL 6.10.16.

Rescinded: Incentive Policy TU2014-10272014-01

Board Approval: 10 27 2014
Executive Committee Approval: 10 14 2014
Oversight Committee Approval: 09 29 2014

Reason: Incentive amounts have been changed in order to increase program engagement.

Board Approval: 08 22 2013
Executive Committee Approval: 08 13 2013
Oversight Committee Approval: 07 29 2013

Reason: The Board does not currently have an Incentive Policy, and one is required to guide the Service Provider.

Incentive Policy - TU2013-08 22 2013- 01

Tulsa Area Workforce Development Board

Incentive Policy

Board Approval: 02/16/2017

I. Purpose:

To provide guidance, in accordance with federal and state regulations, governing the local use incentives, bonus, stipends by the service provider for youth program participants.

II. Authority:

Workforce Innovation and Opportunity Act (WIOA) of 2014 and Oklahoma Workforce Development Issuance-02-2016 WIOA Youth Policy Revised FINAL 6.10.16.

III. Background:

Cash incentives can be effective tools to encourage participation in activities which lead to improved skills and to the achievement of academic, employment and leadership goals and positive outcomes. The WIOA service provider may provide such incentives through the use of stipends and bonuses. Incentives are not an entitlement. All incentive awards will be subject to the availability of WIOA youth funds. It is the discretion of the service provider to decide, on a case by case basis, the use and extent of stipends and bonuses and may be subject to the need of the participant.

IV. Definitions:

A. Bonus:

A type of incentive to reward good performance and/or completion of one's goal found within client's Individual Service Strategy (ISS).

B. Incentive:

A monetary payment given to a participant for successful participation and/or achievement of expected outcome as defined in their ISS. Incentives must be tied to training, education, or work readiness.

C. Individual Service Strategy (ISS):

The ISS is an ongoing strategy jointly developed by the youth participant and the case manager, which identifies an age-appropriated employment/career goal, appropriate achievement objectives, and appropriate combination of services for the participant to reach these objectives.

D. Stipend:

A fixed monetary payment made to a youth participant during his/her enrollment to encourage the youth to participate in certain activities (seat time payments). The stipend can be used for activities such as classroom instruction. Stipends shall only be paid based on actual hours of attendance.

E. Youth Client:

Young person, between the age of 14 and 24 years of age, who meet specific criteria. *For more information, please see the Youth Program Eligibility policy.*

V. Local Policy:

A. Stipend:

An hourly stipend may be awarded to a youth participant during his/her enrollment based on time in attendance for certain activities. Participants will be compensated at a rate equal to the current minimum wage. Because these activities do not involve an employee/employer relationship as defined by the Fair Labor Standards Act, compensation paid for attendance is not subject to labor standards including state and federal tax withholdings.

1. Approved Activities

Examples of activities for which stipend compensation may be used to encourage participation include, but are not limited to the following:

- a. Tutoring
- b. Summer academies
- c. Job readiness workshops
- d. Supervised resource room activities, such as Career Ready101
- e. Mentoring, limited internships, participation in community service projects, service learning projects or job shadowing
- f. Adult Basic Education (ABE) classes for the purpose of basic skills enhancement (individual must be basic skills deficient)
- g. General Education Development (GED) classes

2. Adult Basic Education

A stipend payment for participation in the ABE/GED classes will not exceed 20 hours per week. The Career Manager, upon consultation with the ABE/GED instructor, will evaluate the progress of the participant upon completion of the session (12 to 16 weeks), to determine if additional instruction would be beneficial or necessary for successful testing and attainment of the General Education Development (GED) diploma or for improving basic skills.

3. Required Documents

Stipend Obligation form (Attachment A or B) must be completed prior to a participant's starting the activity. Program notes, Service and Training Plan, and Individual Service Strategy (ISS) must address specifics of the activity and the use of the stipend.

- a. Flyer or Agenda
- b. Sign In sheet

4. Upload Procedures

Select LWDB required documentation (drop down) and enrollment.

- a. Check boxes for Validation and Older Youth.
- b. Check boxes for appropriate activity.
- c. Select the document and insert a note identifying documents being uploaded.
- d. Identify Document Item Box as "(_____) Stipend". (Fill in the blank with the name of activity.)

B. Bonus

An eligible youth participant may be compensated for the attainment of goals, credentials or planned outcomes. The values of the bonus awards are listed in the following section. If a bonus value has not been addressed in this policy or in any other policy, the service provider may submit a written request to the Workforce Tulsa Executive Director identifying the assessed need, the proposed goal and a suggested bonus value to be awarded upon attainment of the goal.

1. Approved Activities

- a. Successful completion of a High School Equivalency Exam during program participation or follow-up - \$100.00
- b. Obtaining postsecondary degree, license, or credential during participation or follow-up - \$100.00
- c. Increasing Test of Adult Basic Education (TABE) post-test scores by at least one functional level in reading or math within the time frame required to meet performance standards - \$50.00
- d. Attainment of Career Readiness Certificate (CRC) during program participation - \$50.00
- e. Raising Career Readiness Certificate (CRC) one level (i.e. bronze to silver, silver to gold, etc.) during program participation - \$75.00
- f. Attendance at youth summit events such as Elevate - \$75.00

- g. Entered employment or postsecondary education or training in the first quarter after the exit quarter. This bonus will be paid during follow-up - \$75.00
- h. Career Club Trip - \$50.00

2. Required Documents

Program notes, Service & Training Plan and Individual Service Strategy (ISS) must address specifics of the activity and the use of the bonus award.

- a. Bonus payment authorization (Attachment C) completed and signed by Career Manager
- b. Copy of appropriate documentation verifying attainment of the goal or credential, such as, but not limited to:
 - 1) High school diploma or transcript
 - 2) Postsecondary or occupational skills training degree, diploma, certificate, license or credential
 - 3) Career Readiness Certificate or WorkKeys scores
 - 4) General Education Development certificate/diploma
 - 5) Test of Adult Basic Education score sheet - Summary of Scores
 - 6) Test of Adult Basic Education results from technology center, online testing or partner agencies
 - 7) Employment check stub or employer statement
 - 8) Verification of enrollment in postsecondary education including personalized class schedule, school identification card, validated enrollment sheet, etc.
 - 9) Flyer or Agenda
 - 10) Sign in Sheet

C. Upload Procedures

- 1. Check boxes for Validation and Older Youth.
- 2. Check boxes for appropriate activity.
- 3. Select the document and insert a note identifying documents being uploaded.
- 4. Identify Document Item Box as "(_____) Stipend". (Fill in the blank with the name of activity.)

VI. Compliance:

- A. The TAWDB is responsible for providing regular oversight of the expenditures of funds found within its policies in accordance with the local monitoring policy.
- B. Changes may be made to attachments, but must contain, at minimum, the information provided. All changes must be approved by Board Staff prior to implementation.

VII. Attachments:

- Attachment A: Stipend Obligation
- Attachment B: Attendance Report
- Attachment C: Bonus Payment Authorization

STIPEND OBLIGATION

ISY OSY

Service provided by Workforce Tulsa Partner Agency

Participant ID: _____

Participant Name: _____
Last First

SERVICE: _____ Start Date: _____ End Date: _____

Student will be paid only for hours actually attended. Time attended will be validated by support documentation.

Maximum Hrs. = _____ Hrs. X \$ _____ per Hr. = \$ _____ Stipend Amount

Participant's Signature Date

Career Manager's Signature Date

Partner Agency Information, if applicable

Agency Name:
Contact Person:
Address:
Email:
Telephone:
X

Partner Representative Signature

Notes:

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TDD/TTY: 1-800-722-0353; Voice: 1-800-522-8506*

ATTENDANCE REPORT

TRAINEE: _____

TRAINING SITE: _____

CLASS/COURSE NAME: _____

FOR PERIOD ENDING: MONTH _____ YEAR 20 _____

" COMPLETE IN INK – NO WHITE OUT – TRAINEE AND INSTRUCTOR MUST INITIAL ALL CHANGES"

DATE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15

DATE	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31

Indicate hours of attendance on appropriate date. If student does not attend on a scheduled day, indicate with "A" for ABSENT.

TRAINEE SIGNATURE & DATE

I certify that the above record of my daily attendance is correct.

INSTRUCTOR SIGNATURE & DATE

I certify that this trainee is under my supervision and the attendance recorded is correct.

The student listed above is in good standing with both grades and attendance. Yes No

If no, please explain:

Workforce Tulsa USE ONLY

() ADULT () DLW () IS () OS

REVIEWED AND APPROVED FOR PAYMENT:

Amount Approved: \$ _____

Print Name – Career Manager

Workforce Tulsa Career Manager

Date

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BONUS PAYMENT AUTHORIZATION

The following individual has successfully completed requirements for a bonus award:

ISY OSY

Participant Name: _____
Last First

Bonus Award Activity: _____

Completion Date: _____

Amount of Bonus Award: _____

Approved by: _____
Service Provider Career Manager Signature Date

(Documentation validating successful completion of bonus award activity must be uploaded before payment is issued.)

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