EcSA Monthly Incentive Payments (State)

Economic Security for All – Monthly Incentive Payment Policies and Procedures

EFFECTIVE DATE: October 24, 2022

POLICY #: P215

I. Purpose:

This directive sets forth procedures for award of the monthly 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 WIN 0129.

II. Background:

In recognition of the work that Washington’s workforce development system did to alleviate poverty through the Economic Security for All (EcSA) Initiative, Governor Inslee and the Legislature approved a $6.2 million appropriation of state general funds for Program Year 2022 to be allocated to Local Workforce Development Boards (LWDBs) to expand on the work currently done by local EcSA programs funded by the Governor's WIOA statewide activities funds. Because this new allocation is state funded, these new resources provide an unprecedented opportunity to further expand the services provided by LWDBs to improve workforce outcomes and reduce poverty across Washington State. The Workforce Development Council of Seattle – King County (WDC) is using this opportunity to provide a monthly incentive of $500 to State EcSA program participants. This document has been prepared to provide guidance in the planning and implementation of this pilot program.

Note: To avoid ambiguity, programs funded by the Governor’s WIOA statewide activities funds will be called Federal EcSA, while those funded by state general funds will be called State EcSA.

III. Policy & Procedure:

A. Step 1 – Determining Eligibility:

i. Anyone enrolled in State EcSA program is eligible to participate in this pilot program.

ii. Additionally sub-contractors might prioritize certain demographic groups based on their determination of need and benefits from the monthly incentive payments. In such cases, sub-contractors must provide the list of priority groups in the order of priority to the WDC project manager.
B. Step 2 – Selecting the Cohort:

i. Each sub-contractor can enroll State EcSA program participants in this pilot program based on the eligibility criteria discussed above.

ii. Case Managers must provide information about the monthly incentive payments program (pilot) to all eligible State EcSA program participants.

iii. Case Managers must run the Federal Reserve Bank of Atlanta’s CLIFF Tools report for all interested program participants and explain the effects of receiving the extra $500/month on the receipt of public assistance so they can make an informed decision about whether to enroll in the pilot.

iv. Because the amount of funds available for the pilot is limited, sub-contractors must create a process to randomly pick the number of eligible program participants that they can support and provide incentive payments.

v. Selected participants will be required to sign the State EcSA Incentive Acknowledgement Form (Attachment A) detailing the pilot program.

C. Step 3 – Monitoring Progress

i. Minimum expectations to qualify for the $500 monthly incentive payments include but are not limited to:
   
   a. Meet at least monthly with the case manager to discuss progress/challenges in any activities (training, education, job search, etc.) as defined in their customized career plan/individual Employment Plan.
   
   b. Attend all scheduled financial literacy classes.
   
   c. Complete additional monthly State EcSA activities outlined in their customized career plan/individual Employment Plan.

ii. Case Managers must complete and submit the monthly progress report (Attachment B) to their managers (or complete it online on Cognito Forms).

iii. Record monthly progress reports in the ETO (or replacement database) under State EcSA Support activity by selecting the State EcSA Financial Support Payments touchpoint. Case note should indicate whether a participant received the monthly incentive, and if not, the reasons for not receiving the incentive in a given month.

D. Step 4 – Payment Process:

i. Before awarding the $500 monthly incentive payment, case managers must ensure that the participant –
   
   a. Has been enrolled in the State EcSA program
b. Has completed the UW Self-Sufficiency Calculator report

c. Has completed an Individual Employment Plan

d. Has signed the acknowledgement form (Attachment A) detailing the monthly incentive program.

ii. Monthly Incentive Payments are made to the participants as long as they meet with their case managers and complete the monthly progress report.

iii. Monthly Incentive Payments are made to program participants until June 2023 even if they meet their goals (obtain a quality job, complete training etc.,) as long as they are not exited from the State EcSA program.

iv. Monthly Incentive Payments may only be awarded to State-Funded EcSA participants for progress in their career plans. They may not be awarded to participants enrolled in WIOA programs or activities, to include Federal EcSA (also known as “EcSA Round 2”), unless they are co-enrolled in State-Funded EcSA and meeting the minimum expectations criteria discussed above.

v. Method of Payment: Monthly Incentive payments may be made by the electronic transfer of funds through financial institutions, or other appropriate methods.
ATTACHMENT A:

State EcSA Monthly Incentive Payment Acknowledgement Form

The following are the requirements to qualify and participate in the State EcSA Monthly Incentive Payments Pilot Program:

1. Be enrolled in State EcSA program.
2. Meet additional demographic requirements to fall on the priority groups for the sub-contractor providing the services (if applicable).
3. Meet at least monthly with the case manager to discuss progress/challenges in any activities (training, education, job search, etc.) as defined in their customized career plan/individual Employment Plan.
4. Attend all scheduled financial literacy classes.
5. Complete additional monthly State EcSA activities outlined in their customized career plan/individual Employment Plan.

Payments:

If participants meet the above criteria, they are eligible for monthly incentive payments of $500 until June 2023 as long the participant is enrolled in the State EcSA program.

Filling Taxes:

It has been explained to me that this incentive is considered as taxable non-wage related income. And as an earner I should calculate the amount of taxes that should be set aside.

I, _________________________________, have read the requirements and agree to abide by them.

(Print Name)

I understand this form and the contents have been explained to me in my primary language.

☐ Yes ☐ No

Participant Signature _________________________________ Date _________________

Case Manager Signature _________________________________ Date _________________
## ATTACHMENT B:
**Monthly Progress Report for Participants Receiving Monthly Incentive Payments**

<table>
<thead>
<tr>
<th>Participant Name:</th>
<th>ETO #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program of Enrollment: State Funded EcSA</td>
<td>Co-enrollments (if any): Example -WIOA Adult</td>
</tr>
<tr>
<td>Reporting Month:</td>
<td>Meeting Type: In-Person/Online</td>
</tr>
</tbody>
</table>

### 1. Is the participant on track to reach their career goals? Briefly describe the progress made by the participant on the following activities (if applicable).

<table>
<thead>
<tr>
<th>Activity</th>
<th>Present/Absent</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Literacy Classes</td>
<td>☐ Present ☐ Absent</td>
<td></td>
</tr>
<tr>
<td>Workshop Participation?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Search</td>
<td>☐ Yes ☐ No</td>
<td>Notes:</td>
</tr>
<tr>
<td>Trainings/Education</td>
<td>☐ Yes ☐ No</td>
<td>Notes:</td>
</tr>
<tr>
<td>Work Based Learning</td>
<td>☐ Yes ☐ No</td>
<td>Notes:</td>
</tr>
<tr>
<td>Other Activities</td>
<td></td>
<td>Notes:</td>
</tr>
</tbody>
</table>

### 2. What was the participant’s biggest success story and/or challenge this month?

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### 3. What does the participant need help with?

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**Case Manager Name & Signature:** ________________________________ **Date** ___________