
	NORTH CAROLINA DEPARTMENT OF COMMERCE DIVISION OF WORKFORCE SOLUTIONS
	DWS POLICY STATEMENT NUMBER: PS 18-2013
	Date: September 12, 2013
	Subject: Workforce Investment Act Funds and Pell Grants
	From:  <hr/> Roger Shackleford, Assistant Secretary

Purpose: To provide information on the use of Workforce Investment Act (WIA) resources when combined with Pell Grants and to rescind Local Area Issuance No. 2000-02.

Background: The Workforce Investment Act Final Rule at 20 CFR Part 663.320(a) states that WIA funding for training is limited to participants who are unable to obtain grant assistance from other sources to pay the costs of their training, or require assistance beyond that available under grant assistance from other sources to pay the costs of such training.

Part 663.320(b) states that program operators must coordinate training funds available and make funding arrangements with One-Stop career center partners and other entities. Training providers must consider the availability of Pell Grants and other sources of grants.

Action: The Workforce Investment Act seeks to ensure that a complete package of financial resources and services is available to the individual seeking training. Other resources that may be available to the individual, including WIA resources, should not be reduced based on the receipt of a Pell Grant unless the combination of such resources results in a level of support that exceeds an individual's cost of training. Individuals who are potentially eligible for a federal Pell Grant must apply. WIA service providers will coordinate funds available with the financial aid office of the training provider. Service providers will complete a Financial Award Analysis form (attached), or alternate form containing the same information, for individuals as a means to determine shortage/surplus of resources available.

Local Workforce Development Boards should share this information as appropriate.

Effective Date: Immediately

Expiration: Indefinite

Contact: Division Field Services Finance Representatives

Attachment: Financial Award Analysis

Rescinded

FINANCIAL AWARD ANALYSIS

TRAINING PROVIDER: _____

Workforce Investment Act (WIA) Participant:	SS#:	Telephone #:
Training Start Date:	Estimated Training End Date:	
Name(s) / Type(s) Of Training :	No. of Semesters / Quarters:	
Training Provider Contact Person:	Telephone #:	Fax #:

TRAINING ITEMS COST OF ATTENDANCE	FUND ASSIGNMENTS (#1-4 UNDER FUNDING SOURCES)	COSTS PER SEMESTER OR QUARTER	NUMBER OF SEMESTERS OR QUARTERS	TOTAL COST OF TRAINING SERVICES
Application/Registration				
Tuition				
Books/Supplies				
Shop/Clinic/Lab Fees/Uniforms				
Physicals				
Licenses/Permits				
Parking Fees				
Student Activity Fees				
Transportation				
Child Care Cost				
Other Required Cost (specify)				
Other Required Cost (specify)				
TOTAL PROJECTED COST OF TRAINING				

AVAILABLE FUNDING SOURCES <i>(Documentation must be attached)</i>	AMOUNT PER SEMESTER OR QUARTER	NUMBER OF SEMESTERS OR QUARTERS	TOTAL AVAILABLE RESOURCES
1. Federal Pell Grant <i>(attach SAR, etc.)</i>			
2. Scholarships/Grants/Other Financial Aid <i>(attach applicable award/denial letters)</i>			
3. Other Sources <i>(specify)</i>			
4. Vocational Rehabilitation/Social Services			
5. TOTAL NON - WIA AVAILABLE RESOURCES			
6. NEEDED/ REQUESTED WIA TRAINING RESOURCES			
7. ADDITIONAL RESOURCES NEEDED <i>(normally this should be a zero balance)</i>			

I, _____, authorize and consent to the release and exchange of confidential information to the WIA Service Provider and the Training Provider.

SIGNATURES: _____
WIA PARTICIPANT DATE

TRAINING PROVIDER DATE

WIA SERVICE PROVIDER DATE