



Department of  
Higher Education

Mike DeWine, Governor  
Randy Gardner, Chancellor

## Memorandum

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To: Aspire Adult Education Program Administrators and  
Agency Fiscal Officers

From: Donna Albanese, Aspire State Director

Date: June 6, 2019

Subject: Career and Training Services Reporting Guidance

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The Workforce Innovation and Opportunity Act (WIOA) is designed to help job seekers access education, training, support services, and employment to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy. To support this goal, job seekers and students should be provided with career and training services to assist their career advancement. State workforce agencies are required to report the costs for providing these services by their local providers on the Statewide Performance Report annually.

This memo provides guidance for Ohio Aspire providers clarifying how to deliver and document career and training services costs incurred with Adult Education and Family Literacy Act (AEFLA) funds. This guidance is based on federal guidance published by the U.S. Department of Labor and the U.S. Department of Education, issued as [Program Memo 17-2](#) (August 23, 2017).

Aspire programs will begin tracking FY 2020 Career Services and Training Services effective July 1, 2019. Expenditures for these services will be reported on Schedule A – Form 4, not due until August 31, 2020. (See Attachment B)

If you have any questions, please contact your regional Aspire program manager.

## Attachment A: Career and Training Services Reporting

Table 1 describes allowable career or training services for title II grantees. Some of the career services represent activities and functions provided as part of regular programming by adult education providers. Other career services may be new to adult education providers and should be incorporated into federally-funded programming to realize the vision of WIOA for all clients.

The left column of the table comes directly from the federal guidance; the right column of the table is a crosswalk, listing four major categories of services. To create meaningful categories of costs, two sets of rows from the federal table are grouped together to reflect how services are typically provided in adult education. For each category, a non-exhaustive list of allowable costs follows.

Each fiscal agent should develop a procedure for documenting the percentage of staff time devoted to allowable activities, based on how these services are offered in various settings (OhioMeansJobs center, satellite class, main campus, etc.) and local wages. The cost methodology could be determined by an analysis of time and effort reports or a time log, for example.

**Table 1: Applicable Career and Training Services for WIOA Title II Program**

From U.S. Department of Education, OCTAE <a href="#">Program Memo 17-2</a> , Attachment 7 – Table C (p. 61) Applicable Career and Training Services for WIOA Title II AEFLA Program	Crosswalk of services to be documented
Outreach, intake, and orientation information	<b>Category: Outreach, intake, and initial assessment</b>
Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities, and supportive services <sup>1</sup> needs	
Referrals to and coordination of activities with other programs and services	<b>Category: Referrals and information dissemination</b>
Provision of information on availability of supportive services or assistance and appropriate referrals (including child care; child support; medical or child health assistance available through the State’s Medicaid program and [Children’s Health Insurance Program] CHIP; [Supplemental Nutrition Assistance Program] SNAP benefits; [Earned Income Tax Credit] EITC; assistance under [Temporary Assistance to Need Families] TANF, and other supportive services and transportation)	<b>Category: Supportive services and assistance</b>
Training costs incurred in Integrated Education and Training (IET) programs	<b>Category: Training</b>

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<sup>1</sup> [Supportive Services Desk Reference from the U.S. Department of Labor](#)

## **Category: Outreach, intake, and initial assessment**

Programs may deliver these services as integrated or linked services, usually at first or early contact with enrolling students. Programs may calculate these costs based on:

**Materials and services** purchased to support outreach and assessment activities, tracked as actual costs in budgets and reimbursement requests; and

**Percentage of staff time** (which may include employee benefits) devoted to these activities.

### **Examples of allowable costs and budget codes under this category:**

Object Code 100:	Percentage of salary of staff performing outreach, intake, or initial assessment activities
Object Code 200:	Percentage of FICA of staff performing outreach, intake, or initial assessment activities
Object Code 400	Media, radio, and print ads; website design; email outreach services; video design; internal printing to aid in outreach, intake, and assessments. Percentage of internet and/or phone connections; percentage of classroom space rental for assessment and intake.
Object Code 500	Cost of initial assessments and supplies used for intake; cost of computers, printers, and supplies used exclusively for intake and initial assessments. Postage used for outreach activities.

## **Category: Referrals and information dissemination**

Programs may deliver these interrelated services through staff positions variously titled counselors, transition specialist, liaison, or navigators, as well as by instructors at satellite classes. Programs may calculate the cost of these services based on:

**Materials** provided to students with this information, tracked as cost estimates in budget workbooks and as actual costs in reimbursement requests; and

**Percentage of staff time** (which may include employee benefits) devoted to these activities.

### **Examples of allowable costs and budget codes under this category:**

Object Code 100	Percentage of salary of staff performing referral and information dissemination activities
Object Code 200	Percentage of FICA of staff performing referral and information dissemination activities
Object Code 400	Contracted copier services; contracted printing; video creation for orientation or dissemination of referrals and information. Internal printing to aid in referrals and information dissemination. Percentage of internet and/or phone connections; percentage of office space rental and/or utilities for referrals and information dissemination

Object Code 500

Cost of materials, supplies, and postage used for referrals and information dissemination

### **Category: Supportive services and assistance**

Programs may deliver and/or arrange for these supportive services to be delivered in various ways and with a variety of partner agencies. Programs are encouraged to partner with other WIOA and community partners to offer these supportive services to students. Programs may calculate the cost of these services based on:

**Materials** provided to students with this information, tracked as actual costs in budget workbooks and reimbursement requests; and

**Percentage of staff time** (which may include employee benefits) devoted to these activities.

#### **Examples of allowable costs and budget codes under this category:**

Object Code 100	Percentage of salary of staff performing or coordinating supportive services
Object Code 200	Percentage of FICA of staff performing or coordinating supportive services

### **Category: Training**

Under WIOA, title II providers are expected to establish partnerships with occupational training providers to deliver Integrated Education and Training (IET) when possible. Title II funds may be used to support the following costs in support of IET programs: occupational skills training, materials, supplies, and equipment used for instruction; and procured training instructor costs. Title II funds may not be used to purchase credential assessments.

#### **Examples of allowable costs and budget codes under this category:**

Object Code 100	Percentage of salary of staff delivering the occupational training course
Object Code 200	Percentage of FICA paid for the percentage of staff time used to deliver occupational training course
Object Code 400	Contracted training instructional services; internal printing to deliver occupational training instruction; percentage of classroom space rental for training instruction
Object Code 500	Cost of materials, supplies, and equipment (under \$5,000) used for training instruction
Object Code 600	Costs of equipment (over \$5,000) used for training instruction



## ATTACHMENT B

### Schedule A Form – Part 4 Career and Training Services

For Project Period Fiscal Year 2019 (July 1, 2019 - June 30, 2020)

Due to ODHE August 31, 2020

**Agency Name:**

Career Services Expenditures

Outreach, intake, and orientation information	<b>Category: Outreach, intake, and initial assessment</b>
Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities, and supportive services <sup>2</sup> needs	
Referrals to and coordination of activities with other programs and services	<b>Category: Referrals and information dissemination</b>
Provision of performance information and program cost information on eligible providers of education, training, and workforce services by program and type of provider	
Provision of information on availability of supportive services or assistance and appropriate referrals (including child care; child support; medical or child health assistance available through the State's Medicaid program and [Children's Health Insurance Program] CHIP; [Supplemental Nutrition Assistance Program] SNAP benefits; [Earned Income Tax Credit] EITC; assistance under [Temporary Assistance to Need Families] TANF, and other supportive services and transportation)	<b>Category: Supportive services and assistance</b>

Object Code	Description	Amount
<b>TOTAL Career Services</b>		

<sup>2</sup> [Supportive Services Desk Reference from the U.S. Department of Labor](#)

Training Services Expenditures

Training costs incurred in Integrated Education and Training (IET) programs	Category: Training
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Object Code	Description	Amount
TOTAL Training Services		