



Southwest Georgia Workforce Development Board

Policy/Procedure Name: 3.2.3 Family Size, Income Determination and Self-Sufficiency Standards

Policy/Procedure #: WIOA-2016-64

Effective Date: December 6, 2016

**Revision Date: November 29, 2017**

**Rescinds Policy #64 – Self Sufficiency Standards dated 3/2/2016**

### **PURPOSE.**

Self-Sufficiency Standards - WIOA section 134 (a)(3)(A)(xii) and section 134 (d)(1)(A)(x) addresses state and local determinations of economic self-sufficiency standards that specify the income needs of families, by family size, number and ages of children in the family, and sub-state geographical considerations. Under WIOA sec. 134(c)(3)(A), training services may be made available to employed and unemployed adults and dislocated workers who, among other criteria, are 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, and are in need of training services to obtain or retain employment leading to economic self-sufficiency or wages comparable to or higher than wages from previous employment.

The State defines minimum standards for defining “lacks self-sufficiency” as follows:

An individual is declared to “lack self-sufficiency” if:

- A. An individual has a personal or family income that is at or below 100% of the Lower Living Standard Income Level (LLSIL),
- B. A Food stamp or TANF recipient (current or within the last six months),
- C. A Supplemental Social Security Income recipient, or
- D. An individual (single family of one) who is employed, but in a job earning \$10.69 (Living Wage Calculator for the State of Georgia) an hour or less.

Dislocated workers may be considered to lack self-sufficiency if they are employed, but in a job/occupation that is at a wage or skill level that is significantly less than the job of dislocation.



Local areas are permitted to define self-sufficiency at a higher income level than the state minimum, as long as supporting documentation is provided. This policy defines the eligibility criteria and self-sufficiency standards for Local Workforce Development Area 17.

## **POLICY.**

### **I. Family Size**

Family size must be determined and verified only if using family income to determine low-income status. Family size will be determined by counting the maximum number of family members in the residence during the last six months, not including the current month.

A family, for eligibility purposes, means two or more persons related by blood, marriage or decree of court, who are living in a single residence, and are included in one or more of the following categories:

- A. A married couple and dependent children
- B. A parent or guardian and dependent children
- C. C. A married couple 20 CFR § 675.300

In certain cases, an individual may be considered a "family of one" for the purpose of eligibility determination. This includes individuals with a disability whose family income may exceed the income criteria, but whose own income meets the income criteria. 20 C.F.R. § 680.640

Local Workforce Development Area 17 will use the Internal Revenue Service (IRS) definition of dependent for eligibility purposes. The IRS defines a dependent as a qualifying child or a qualifying relative satisfying the following four tests:

- ✓ **Relationship** – child or stepchild, (whether by blood or adoption), foster child, sibling or stepsibling, or a descendant of one of these.
- ✓ **Residence** – has the same principal residence as the taxpayer for more than half the tax year. Exceptions apply, in certain cases, for children of divorced or separated parents, kidnapped children, temporary absences, and for children who were born or died during the year.
- ✓ **Age** – must be under the age of 19 at the end of the tax year, or under the age of 24 if a full-time student for at least five months of the year, or be permanently and totally disabled at any time during the year.
- ✓ **Support** – did not provide more than one-half of his/her own support for the year.

### **II. Income Determination**

Income is the amount of all reportable income for each family member for the prior six (6) months. This amount multiplied by two (2) is the total annualized family income.



Family income means all includable income actually received from all sources by all members of the family during the income determination period. However, when computing family income, the income of a spouse and/or other family members shall only be counted for that portion of the income determination period that the person was actually a part of the family of the applicant.

Family size for the determination period is the maximum size of the family during such period. All items not expressly excluded are includable income.

Applicants having low or no income should complete an applicant statement that describes their means of support in the last six months.

**A. INCLUDE** in Family Income:

- I. Unemployment compensation, child support payments and old-age survivors insurance benefits received under section 202 of the Social Security Act (42 USC 402) are included under WIOA and no longer excluded.
  1. Old age and survivors insurance benefits include: Social Security Survivor Benefits are benefits paid to people up to age 18 who have had a parent die and the parent paid wages into the system; and
  2. Social Security Retirement Benefits – these are benefits that are paid to people who reached their social security age and have wages paid in the system.
- II. Money wages and salaries before any deductions;
- III. Net receipts from non-farm self-employment (receipts from a person's own unincorporated business, professional enterprise, or partnership after deductions for business expenses);
- IV. 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);
- V. Regular payments from railroad retirement, strike benefits from union funds, worker's compensation, and training stipends;
- VI. Alimony;
- VII. Regular support from an absent family member or someone not living in the household;
- VIII. Pensions, whether private or public employee;
- IX. Military pension benefits authorized by Titles 10 and 15 USC (TEGL 10-09);
- X. Regular insurance or annuity payments other than Supplemental Security Income disability (SSI) or Veterans' disability;
- XI. College or university grants, fellowships, and assistantships;
- XII. Net gambling or lottery winnings;
- XIII. Social Security Disability Insurance payments (SSDI)
  1. SSDI pays benefits to individuals that have worked in the past, paid Social Security taxes, and are currently unable to work for a year or more because of a



disability. SSDI is considered income replacement and must be included in family income.

**B. EXCLUDE** from Family Income:

- I. Military pay or allowances paid while on active duty or paid by the Department of Veterans Affairs for vocational rehabilitation, disability payments or related VA-funded programs (38 U.S.C. 4213 and 20 CFR 683.230. (TEGL 19-16)
- II. Public Assistance payments (including Temporary Assistance to Needy Families (TANF), Supplemental Security Income (SSI), Refugee Case Assistance (RCA), and General Assistance (GA));
  1. Supplemental Security Income (SSI) is a program that pays benefits to disabled adults and children who have limited income and resources. It is also paid to people 65 and older without disabilities who meet the financial limits. SSI is considered cash assistance and individuals receiving SSI are automatically income eligible the same as individuals receiving TANF or SNAP. A WIOA participant applicant on SSI is a family of one. Refer to the Adult or Youth Verification Worksheets for acceptable documentation for SSI recipients.
- III. Foster care child payments;
- IV. Title IV of the Higher Education Act (i.e., Pell Grants, Federal Supplemental Educational Opportunity Grants (FSEOG), and Federal Work-Study (FWS);
- V. Needs-based scholarship assistance;
- VI. Severance pay;
- VII. Capital gains;
- VIII. Any assets drawn down as withdrawals from a bank, the sale of property, a house or a car;
- IX. Tax refunds, gifts, loans, lump-sum inheritances, one-time insurance payments, or compensation for injury;
- X. Non-cash benefits such as employer paid fringe benefits, food or housing received in lieu of wages, Medicare, Medicaid, Food Stamps (received or has been determined eligible to receive Food Stamps (SNAP) within the six-month period prior to application for the program); school meals, and housing assistance;

**III. Self-Sufficiency Standards**

WIOA section 134 (a)(3)(A)(xii) and section 134 (d)(1)(A)(x) addresses state and local determinations of economic self-sufficiency standards that specify the income needs of families, by family size, number and ages of children in the family, and sub-state geographical considerations. LWDA's may make adjustments to the following factors based on local considerations.

Under 20 CFR § 680.210 training services may be made available to employed and unemployed adults and dislocated workers who, among other criteria, are 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, and are in need of training services to obtain or retain employment leading to economic self-sufficiency or wages comparable to or higher than wages from previous employment.

The Local Workforce Development Area 17 defines minimum standards for defining "lacks self-sufficiency" as follows:

An individual is declared to "lack self-sufficiency" if:

- A. An individual has a personal or family income that is at or below **200% of the Lower Living Standard Income Level (LLSIL)**. The Southwest Georgia Workforce Development Board utilized the Living Wage Calculator (for Albany GA – LWDA MSA and State of Georgia) at <http://livingwage.mit.edu/> to set the local definition of "lacks self-sufficiency" standard.
- B. A Food stamp or TANF recipient (current or within the last six months),
- C. A Supplemental Social Security Income recipient, or
- D. An individual (single family of one) who is employed, but in a job earning \$10.69 (Living Wage Calculator for the State of Georgia) an hour or less.

Dislocated workers may be considered to lack self-sufficiency if they are employed, but in a job/occupation that is at a wage or skill level that is significantly less than the job of dislocation.