

5. DISCUSSION and POSSIBLE ACTION

- 5.1 Review and Approve NOW Policy (New) A06 Remote Work Policy (Page 5)
- 5.2 Review and Approve NOW Policy P11 Supportive Services & Needs-Related Payments (Page 9)
- 5.3 Review and Approve NOW Policy P13 Incumbent Worker Training (Page 14)
- 5.4 Review and Approve NOW Policy (New) P15 Work Experience and Transitional Jobs (Page 22)

6. INFORMATION

H1B1 Grant Update – Heather DeSart, NOW Executive Director

7. EXECUTIVE COMMITTEE MEMBER COMMENTS – Roundtable

8. SECOND PUBLIC COMMENT SECTION

Please clearly state your name and address for the record. Each public comment will be limited to three (3) minutes at the Chair’s discretion.

9. ADJOURN

Northwest Oregon Works meetings are open to the public and conform to Oregon Public Meetings Laws. A request for an interpreter for the hearing impaired or, other accommodations for persons with disabilities, should be made at least 72 hours in advance of the meeting to our office at (541) 921—9241, or Emily@onwib.org. . TTY is available at 711 or (800) 735-2900.



MINUTES

NORTHWEST OREGON WORKS EXECUTIVE COMMITTEE MEETING

May 4, 2018, 2:00 p.m.

Oregon Coast Community College, Conference Room
3788 SE High School Drive, Lincoln City, Oregon 97367

Present: **Tony Erickson**, Oregon AERO, Chair; **Henry Balensifer III**, LEKTRO; **John Hawkins**, Service Employees International Union; **Doug Hunt**, Lincoln County Commissioner; **Zach Poole**, Pig 'N Pancake; **Debra Smith**, Central Lincoln PUD

Staff: **Heather DeSart**, NOW Executive Director; **Lisa Grisham**, NOW Recorder; **Pete Svendsen**, NOW Program Manager; **Jason Swain**, NOW Chief Financial Officer; **Cierra Guerrero**, NOW Youth Success Coach

Guests: **Martha Lyon**, Community Services Consortium; **Camille Padilla**, ResCare

1. CALL TO ORDER, CONFIRMATION OF POSTING, AND ROLL CALL

Chair Erickson called the meeting to order at 2:04 p.m. Chair Erickson asked for confirmation of the posting, which Grisham confirmed. Roll call was taken, and a quorum was present.

2. AGENDA REVIEW

Inclusion of any emergency items, or deletion of any items

7.1 Second Public Comment Session

3. PUBLIC COMMENT SESSION

There were no public comments.

4. CONSENT CALENDAR

4.1. Minutes of the December 12, 2016 Executive Committee meeting

MOTION: Hawkins moved to approve the Consent Calendar of May 4, 2018. Poole seconded the motion. There was no discussion. None opposed. Motion carried 5-0.

5. DISCUSSION AND ACTION

5.1. Review and Approve NOW FY 2018-2019 Budget – *Jason Swain, NOW CFO*

Swain presented the proposed budget for Fiscal Year 2018-2019, and discussed how the federal Workforce Innovations and Opportunity Act (WIOA) budget was cut.

MOTION: Hawkins moved to approve the budget as presented. Hunt seconded the motion. There was no discussion. None opposed. Motion carried 5-0.

2:19pm Balensifer III arrived

- 5.2. Approve Staff recommendation to Award PY 2018-2019 Program Provider Contract, Not to Exceed \$1,250,000.00 to provide Adult, Dislocated Worker and Youth Services in Benton County, Clatsop County, Columbia County, Lincoln County and Tillamook County – *Heather DeSart, NOW Executive Director and Karen Litvin, Project Masters*

Hunt recused himself due to a potential CSC conflict, as he sits on their board. DeSart introduced Karen Litvin, of Project Masters, and explained how their company was selected to conduct proposal evaluations. Litvin summarized her recommendation to the board, mentioning that we received two solid proposals that scored very closely to one another.

MOTION: Smith moved to award the Northwest Oregon Works Program Year 2018-2019 Program Contract to ResCare, Not to Exceed \$1,250,000.00, to provide Adult, Dislocated Worker and Youth Services in Benton County, Clatsop County, Columbia County, Lincoln County and Tillamook County. Poole seconded the motion. There was no discussion. None opposed. Motion carried 5-0 (Hunt abstained).

6. EXECUTIVE COMMITTEE MEMBER COMMENTS – Roundtable

Hunt stated that the Governor has made appointments to Maritime task force. Balensifer III spoke about newly implemented overtime conditions, and their drawbacks.

7. OTHER BUSINESS

- 7.1. Second Public Comment Session

Martha Lyon, Executive Director, Community Services Consortium, 250 Broadalbin, Albany, Oregon

Lyon thanked NOW for their work. CSC is hoping to make a smooth transition. She stated how it has been very enjoyable working with this workforce board.

Camille Padilla, ResCare, 450 Marine Drive, Astoria, Oregon

Padilla thanked the board for the opportunity to serve. ResCare is excited to serve Youth population. Their team thrives on changes, and they look forward to working together.

8. ADJOURN

Chair Erickson adjourned the meeting at 2:32p.m.

	POLICY A06: REMOTE WORK
	APPROVED:
	<input checked="" type="checkbox"/> NEW <input type="checkbox"/> REVISED

PURPOSE

Northwest Oregon Works (NOW) is a virtual office environment. As a virtual office, employees can work from anywhere while still utilizing the mailing address, phone services, meeting rooms, and videoconferencing of the organization. Our staff operates as one unit to serve customers and conduct work, but we do not operate from a fixed location.

NOW believes that a virtual office arrangement can lead to greater productivity, as it frees workers from administrative tasks, as well as commutes. Each employee can work from the location that is most convenient, and the business is not restricted to hiring employees who live in the same vicinity of the five-county workforce area. The purpose of this policy is to establish protocols for remote work.

POLICY

Agreement

Because we are a virtual office environment, all employees will complete a remote work agreement, Attachment A. Employees should indicate their primary working address in the remote working agreement which will also outline their responsibilities as remote employees and basic schedule.

Compensation and Work Hours

Employee’s compensation, benefits, work status and work responsibilities do not change due to the remote work environment. The time each employee is expected to work per day or pay period also does not change as a result of remote work.

Schedule

Employees will work according to a schedule agreed upon with their immediate supervisor. Schedules may vary from employee to employee, and may allow for non-traditional schedules outside of the typical work week.

Communication and Work Tracking

Employees must be available by phone and email during agreed-upon hours. Employees are expected to be available for meetings, and other meetings deemed necessary by management. Employees and supervisors will communicate regularly regarding work assignments, progress and completion. Employees will also keep track of assignments and daily progress toward completion using a method agreed upon with their supervisor and/or by the NOW team for work tracking. Employees may be asked to be flexible with schedules as necessary to meet a deadline or respond to a communication where time is of the essence. Employees who are not exempt from the overtime requirements of the Fair Labor Standards Act will be required to accurately record all hours worked using NOW’s time-reporting procedures.

Workspace

The employee shall designate a workspace within the remote work location for placement and installation of equipment to be used while working remotely. The employee shall maintain this workspace in a safe condition, free from hazards and other dangers to the employee and equipment. To ensure that employee performance will not suffer in remote work arrangements, we advise our remote employees to:

- Choose a quiet and distraction-free working space.
- Have an internet connection that's adequate.
- Dedicate their full attention to their job duties during working hours.
- Adhere to break and attendance schedules agreed upon with their supervisor.
- Ensure their schedules overlap with those of their team members for as long as is necessary to complete their job duties effectively.

On-site Visits

NOW has the right to make on-site visits (with 48 hours advance notice) to the remote work location for purposes of determining that the site is safe and free from hazards, and to maintain, repair, inspect, or retrieve NOW-owned equipment, software, data or supplies.

Equipment

The company may provide specific equipment and supplies for employees to perform their work duties. This may include computer hardware, computer software, phone lines, email, voice-mail, printers, work stations, connectivity to host applications, and other applicable equipment as deemed necessary.

The use of equipment, software, data supplies and furniture, when provided by NOW for use at the remote work location, is limited to authorized persons and for purposes relating to NOW business. NOW will provide for repairs to company equipment. When the employee uses her/his own equipment, the employee is responsible for maintenance and repair of equipment.

NOW reserves the right to make determinations as to appropriate equipment, subject to change at any time. Equipment supplied by the organization is to be used for business purposes only. The employee must sign an inventory of all NOW property received and agree to take appropriate action to protect the items from damage or theft. Upon termination of employment, all company property will be returned to the company, unless other arrangements have been made.

In the event that an employee is issued computer equipment, it is the responsibility of the employee to ensure that use of the device is in compliance with all NOW policies, legal and appropriate. Portable computer equipment, such as laptops, will be kept in the possession of the employee at all times while in transit. Computers, devices and equipment will not be left unattended in cars or other locations for any duration of time.

If a device or piece of equipment is damaged or stolen due to lack of compliance with these requirements, employees may be required to replace the item at their sole expense.

Office Supplies

NOW will supply the employee with appropriate office supplies (pens, paper, etc.) as deemed necessary and will also reimburse the employee for business-related expenses, such as phone calls and shipping costs, that are reasonably incurred in carrying out the employee's job. Out-of-pocket expenses for other

supplies will be reimbursed only with prior approval by the Executive Director or designee. The company may pay work-related voice and data communication charges.

Materials and Information.

Any work-related materials will be kept in the designated work area and not be made accessible to others. Personal Identifying Information of employees, contractors, and participants will be kept securely. Passwords to electronic devices will not be shared and any printed materials with personal identifying information will be kept in a locked cabinet within the remote workspace. Employees must follow all policies and procedures regarding records management and confidentiality concerning employee and contractor information as well as participant data.

Worker's Compensation and Liability

Employees are covered by worker's compensation during work hours and while performing work functions in the designated remote work area. The company assumes no liability for injuries occurring in the employee's home workspace outside the agreed-upon work hours.

The company is not liable for loss, destruction, or injury that may occur in or to the employee's home. This includes family members, visitors, or others that may become injured within or around the employee's home.

Dependent Care

Employees will make arrangements for regular dependent care and understand that remote work environments are not a substitute for dependent care. In some circumstances, exceptions may be made for employees with caregiving responsibilities.

Taxes

It will be the employee's responsibility to determine any income tax implications of maintaining a home office area. The company will not provide tax guidance nor will the company assume any additional tax liabilities. Employees are encouraged to consult with a qualified tax professional to discuss income tax implications.



Remote Work Agreement

Employee Name:			
Job Title:			
Hire Date:			
FSLA Status	<input type="checkbox"/> Exempt	<input type="checkbox"/> Non-Exempt	
Remote Work Location:			
	Street Address	City, State, Zip Code	
Schedule:			
Equipment Issued:	NOW will provide the following equipment (list any inventory numbers):		
<p>By signing, the employee agrees to:</p> <ul style="list-style-type: none"> • Remain accessible and productive during scheduled work hours; • Comply with all NOW rules, policies, practices and instructions; • Maintain a safe and secure work environment at all times and report work-related injuries as soon as practicable; • Ensure that NOW-issued equipment will not be used by anyone other than the employee and only for business-related work; • Protect company tools and resources from theft or damage and to report theft or damage immediately; • Comply with NOW policies and expectations regarding information security; and • Return company equipment and documents within five days of termination of employment. <p>I understand that NOW reserves the right to modify this agreement for any reason at any time.</p>			
Employee Name: (printed)			
Employee Signature:		Date:	
Supervisor Signature:		Date:	

	POLICY P11: SUPPORTIVE SERVICES AND NEEDS-RELATED PAYMENTS
	APPROVED: 10/28/2016 – NOW INTERNAL REVISION: 11/24/2020 REVISION APPROVED:
	<input type="checkbox"/> NEW <input checked="" type="checkbox"/> REVISED

PURPOSE

This policy addresses the use of WIOA Title I funds for supportive services and needs-related payments (NRPs) to support adults, dislocated workers, and youth participating in WIOA Title I activities.

BACKGROUND

The Workforce Innovation and Opportunity Act (WIOA) provides program guidelines for participant supportive services. Supportive services may only be provided to participants who are participating in career services (other than follow up career services) and/or training services and who are unable to obtain the services through other programs who provide such services.

POLICY

Providers may provide supportive services to eligible youth, adults, and dislocated workers in accordance with this policy. Supportive services may only be provided after it has been determined such services are necessary to enable the participant to participate in Workforce Innovation and Opportunity Act (WIOA) activities. The cost of supportive services must be both reasonable and competitive in price. Supportive services include:

- Assistance with transportation
- Assistance with child care and dependent care,
- Linkages to community services
- Assistance with housing,
- Assistance with educational testing
- Assistance with uniforms and other appropriate work attire and work-related tools, including such items as eye glasses and protective eye wear,
- Assistance with books, fees, school supplies, and other necessary items for students enrolled in post-secondary education classes,
- Reasonable accommodations for individuals with disabilities,
- Referrals to healthcare,
- and Needs Related Payments needed to enable individuals to participate in WIOA Title I activities.

Needs Related Payments

Needs-related Payments (NRP) are designed to provide a participant with financial assistance to help individuals meet their non-training expenses in order to help them to complete training successfully. Providers must ensure the appropriate use of NRP as an allowable supportive service for WIOA out of school youth, adult and dislocated worker program participants as follows. NOW must approve all NRPs prior to obligation of funds and/or payment of NRP by a provider.

Eligibility

Adults and Out of School Youth (18-24) must:

1. Be unemployed;
2. Not qualify for, or have ceased qualifying for, unemployment compensation; and
3. Be enrolled in a program of training services under WIOA sec. 134(c)(3).

A dislocated worker must:

1. Be unemployed, and:
 - a. Have ceased to qualify for unemployment compensation or trade readjustment allowance under TAA; and
 - b. Be enrolled in a program of training services under WIOA sec. 134(c)(3) by the end of the 13th week after the most recent layoff that resulted in a determination of the worker's eligibility as a dislocated worker, or, if later, by the end of the 8th week after the worker is informed that a short-term layoff will exceed 6 months; or
2. Be unemployed and did not qualify for unemployment compensation or trade readjustment assistance under TAA and be enrolled in a program of training services under WIOA sec. 134(c)(3).

If these eligibility requirements are met, individuals may be awarded NRP from WIOA funding prior to the start date of training classes for the purpose of enabling them to participate in program of employment and training services that begin within thirty (30) calendar days. At that point or sooner, as appropriate, all participants must be enrolled in *Training Services*.

Amount

The level of needs-related payments made to adults and out of school youth will be \$55 per day while in training. A full \$55 per day will be issued to participants when they attend at least 50% or half-day of training; anything less they will not receive the \$55 Needs Related Payment. The daily amount is based on economically disadvantaged criteria which are updated annually, therefore, the NRP adult and youth level may be updated to reflect any changes. NOW may, at its sole discretion, approve partial payment of a needs-related payment for eligible participants, and may approve a higher daily payment on a case-by-case basis. These exceptions will be based on funds availability, barriers of the training participant, and type of training in alignment with NOW priorities for target populations and industry sectors.

For dislocated workers, payments must not exceed the greater of either of the following levels:

1. The applicable weekly level of the unemployment compensation benefit, for participants who were eligible for unemployment compensation as a result of the qualifying dislocation; or
2. The poverty level for an equivalent period, for participants who did not qualify for unemployment compensation as a result of the qualifying layoff. The weekly payment level must be adjusted to reflect changes in total family income, as determined by Local WDB policies.

Eligibility and need will be assessed and documented for each participant receiving NRPs. NOW will authorize all NRPs at its sole discretion based on demonstration of need, funds availability, and alignment with organizational priorities for training and employment programs.

Weekly payment levels must be adjusted to reflect changes in total family income. Limits may be placed on NRPs subject to availability of funds. The above adult, out of school youth and dislocated workers NRP levels will be used after determining need. The minimum NRP will be \$25 per week.

Administration and Oversight

1. Eligibility documentation and needs analysis including a budget (such as those shown in Attachments A and B) will be provided to NOW for review and approval prior to the authorization, obligation or payment of any NRP.
2. A copy of any UI entitlement decision or confirmation of UI benefits being exhausted will be maintained in each customer file or attestation form signed with above information.
3. A copy of the requests for training for each period of training (quarter, semester, block, class, etc.) will be maintained in each customer file. (A copy of the customers Individual Training Account (ITA) will be used as documentation).
4. Verification of enrollment/registration, participation, and completion of training (confirmation from training office or course instructor) will be maintained in each customer file. A copy of class schedule will be maintained in each customer file and will be used as documentation. Monthly verifications of attendance and training progress will be reviewed.
5. Each customer determined eligible and receiving NRPs will have signed a copy of to his/her understanding of the requirements and instruction.
6. All eligibility will be documented and maintained in the customer file.

Service providers are responsible for verification and documentation of eligibility for needs-related payments for adults, out of school youth and dislocated worker program participants.

REFERENCES

Proposed 20 CFR 680.300, 680.930, 680.940, 680.950, 680.960, and 680.970 – Adult and Dislocated Worker

Attachment A - Needs Related Payment Support Analysis Form

1. Are you unemployed or have you received notification of layoff?
 Yes **No**

2. Do you currently qualify for Unemployment Insurance benefits?
 Yes **No**

3. Do you currently qualify for additional state or extended Unemployment Insurance benefits (e.g., Training Benefits)?
 Yes **No**

4. Do you currently qualify for Trade Readjustment Allowances (TRA)?
 Yes **No**

5. Are you receiving any other federal or state income support? *Examples: TANF, Training Completion Aid?*
 Yes **No**

6. Do you need income support beyond these other resources in order to participate in training full-time?
 Yes **No**

Needs Related Payments (**NRP**) are not intended to provide the entire amount of income support you need to complete your training. If you are awarded an NRP, it will be based on this support analysis and budget you provide. These payments are made to help you while making satisfactory progress while attending training.

All answers and statements are true and complete to the best of my knowledge. I understand that providing untruthful or misleading answers are cause for denial of NRPs. Any overpayments or fraud based on my false or misleading answers could result in my repayment of any NRPs provided.

Signature	Date
Print Name	

Attachment B – Resource Worksheet for Needs Related Payment Determination

Monthly Income		Monthly Expense	
Personal		Rent/Mortgage	
Spouse/Partner		Electricity	
Other Family Members		Heating	
Child Support		Water/Sewer/Garbage	
Social Security		Telephone	
Maintenance/Alimony		Auto Payments	
Retirement		Day Care	
Workers Compensation		Medical Ins/Out of Pocket	
Public Assistance		Food	
Trade Act Allowance		Clothing	
Other		Fuel	
		Public Transportation	
		Other	
Total Monthly Income		Total Monthly Expenses	
BALANCE/DEFICIT Monthly			
BALANCE/DEFICIT Weekly		Weekly Training Expense	

	POLICY P13: INCUMBENT WORKER TRAINING
	APPROVED: 1/27/2017 – NOW INTERNAL REVISION: 11/24/2020 APPROVED REVISION:
	<input type="checkbox"/> NEW <input checked="" type="checkbox"/> REVISED

PURPOSE

The purpose of this policy is to outline the use of local Workforce Innovation and Opportunity Act (WIOA) funds for Incumbent Worker Training (IWT) programs.

POLICY

Incumbent Worker Training is designed to meet the special requirements of an employer (including a group of employers) to: retain a skilled workforce, avert the need to lay off employees, enable employees to advance on a career ladder, and/or to provide new or updated knowledge or skills in order to support retention, expansion and growth of the employer. Incumbent Worker training must increase both a participant’s and a company’s competitiveness.

NOW may expend up to 20 percent of its combined total of adult and dislocated worker allocations for incumbent worker training. Employers and trainees must meet eligibility criteria in order to participate in an IWT program, as outlined in Exhibit A. There are additional criteria that must be taken into account by NOW for an employer to receive IWT funds which are also outlined in the Incumbent Worker Training Application, Exhibit A.

Costs of Training

IWT projects are partnerships that involve investment by both employers and NOW. Participating employers will pay the following share of training costs:

- 10 percent of the cost for employers with not more than 50 employees
- 25 percent of the cost for employers with 51-100 employees; and
- 50 percent of the cost, for employers with more than 100 employees

The employer investment may be a cash or in-kind. The value of in-kind contributions must be demonstrated using documentation of fair market value of the contribution. Employers may contribute to the direct cost of training and training materials. The investment by the employer may also include the amount of the wages paid by the employer to a worker while the worker is participating in the training activity. Wages paid to the participant while in training can be included only as an in-kind contribution and will not be reimbursed. Employer cost share contributions must be tracked and documented. In addition, the methodologies for determining the value of in-kind contributions must be documented and conform to cost sharing requirements.

Awards

Employers will apply for funds using the IWT Application. At its discretion, NOW may use a competitive process with application deadlines to award resources and otherwise will allocate funds on a first-come first-serve basis while funds are available.

Funds will be awarded based on funds availability as well as need and appropriateness of training relevant to local industry priorities. The specific amount per project, number of employees to be trained, type of training, project outcomes and project requirements will be reviewed annually and are subject to change ongoing.

REFERENCES

WIOA Section 3(23)

WIOA Section 134(d)(4)

20 CFR 680.780, 680.790, 680.800, 680.810, and 680.820

2 CFR 200.306

Policy P05 Individual Training Account

Policy P07 On the Job Training, Limits and Procedures

Exhibit A
INCUMBENT WORKER TRAINING PROGRAM
EMPLOYER APPLICATION

Northwest Oregon Works (NOW) supports professional development as an integral part of effective workforce development. One way NOW demonstrates this support is through Incumbent Worker Training Programs (IWT). IWT programs provide training to existing workers in order to help them advance in a career pathway and/or to provide new or updated knowledge or skills in order to support retention, expansion and growth for the employer.

COSTS

IWT programs are partnerships wherein NOW and the employer co-invest in the training. Employers are responsible for a share of training costs based on number of employees as follows:

- 10 percent (10%) of the cost for employers with not more than 50 employees
- 25 percent (25%) of the cost for employers with 51-100 employees; and
- 50 percent (50%) of the cost, for employers with more than 100 employees

The employer investment may be a cash or in-kind. The value of in-kind contributions must be demonstrated using documentation of fair market value of the contribution. Employers may contribute to the direct cost of training and training materials. The investment by the employer may also include the amount of the wages paid by the employer to a worker while the worker is participating in the training activity. Wages may be applied to the amount of an employer's investment as an in-kind contribution only. NOW will not reimburse wages paid to trainees.

The following activities may be paid for with IWT funds:

- The cost of training for employees to learn: a new or updated technology, equipment or process; employer-specified or industry- specific skills;
- Train-the-trainer instruction to build the capacity of businesses;
- Training materials and supplies;
- Facility expenses directly related to and necessary for the training;
- Rental of tools and equipment critical to the project;
- Travel expense and per diem of instructor(s) at government-approved rates; and
- Instructor/trainer fees

Funds may not be used to pay for:

- Costs incurred prior to the approval date of the application;
- Construction or purchase of facilities or buildings;
- Equipment purchases;
- Business relocation expenses;
- Lobbying activities
- Activities that directly or indirectly assist, promote, or deter union organizing.

Employer Eligibility Criteria

Employers must meet all eligibility criteria in order to apply for IWT. Employer must:

1. Operate in Benton, Clatsop, Columbia, Lincoln and/or Tillamook Counties.
2. Operate within a NOW priority industry outlined in its local plan and/or operates in an in-demand, in-balance or declining industry as determined by labor market information.
3. Have operated in Oregon for at least one year and not relocated from another location resulting in layoffs in the preceding 120 days prior to date of application.
4. Be current on all state and local tax obligations including unemployment insurance and workers' compensation.
5. Not be a religious, lobbying, gambling, or marijuana-related organization.
6. Have at least one full-time employee.

If the project will serve a group of employers, the applicant must meet all application criteria and will serve as the eligible employer and fiscal agent in any funding agreement that results from this application.

The following factors will be considered by NOW when considering applications for funding:

- The characteristics of the workers to be trained and how their retention and/or advancement would benefit from the training.
- The relationship of the training to the competitiveness of the trainees and the employer.
- The quality of training.
- Whether the training will allow the participant(s) to gain industry-recognized training experience, lead to industry-recognized credentials and/ or an increase in wages;
- The number of participants the employer plans to train or retrain;
- The wage and benefit levels of participants before and after training;
- The existence of other training opportunities provided by the employer
- The occupation(s) for which incumbent worker training is being provided must be in demand;

Incumbent Worker Eligibility Criteria

An incumbent worker must be:

1. A U.S. citizen or otherwise legally entitled to work in the U.S.;
2. Age 18 or older;
3. Registered for the Selective Service (males who are 18 or older and born on or after January 1, 1960) unless an exception is justified;
4. Employed;
5. Meet the Fair Labor Standards Act requirements for an employer-employee relationship (<http://www.dol.gov/whd>); and
6. Have an established employment history with the employer for six (6) months or more.

If the IWT is being provided to a cohort of employees, not every employee in the cohort must have an established employment history with the employer for six months or more as long as a majority of those employees being trained do meet the employment history requirement. IWT participants may be required to complete registration with WorkSource Oregon, if eligible.

Types of Incumbent Worker Training

Incumbent worker training may be provided as classroom-based training, on-the-job training, apprenticeship or a combination of the above. Training may be provided by the company for which the incumbent worker(s) works, or reputable education or training vendors.

Applications for IWT programs should demonstrate the need for training, to include:

- Declining sales,
- Supply chain issues,
- Adverse industry market trends,
- Changes in management behavior or ownership,
- Phasing out of certain function(s) with the introduction of new function(s) that require worker retraining,
- Required skill changes that would otherwise require downsizing, layoffs, etc. if not addressed including, but not limited to:
 - Skill changes required by external economic or market forces
 - Significant changes in technology or operating processes
 - Rapidly changing industry or occupational job requirements
 - Emergence of new products
- New technology and/or equipment implementation,
- Creation of new employment opportunities that require advance skills and knowledge, or
- Other reason justified in the application and deemed appropriate by NOW.

Application and Award

Completed applications should be submitted to info@onwib.org. Funds will be awarded based on funds availability as well as need and appropriateness of training relevant to local industry priorities. At its discretion, NOW may use a competitive process with application deadlines to award resources and otherwise will allocate funds on a first-come first-serve basis while funds are available.

If awarded, employers will sign an IWT agreement, acknowledge receipt of Grievance & Complaint Procedures and EEO Notification and any other documents required by the fund source. Upon completion of the training, and prior to reimbursement, the employer will submit employee eligibility documentation (name, gender, SSN, date of birth, job title, wage for each trainee), certificates of completion and/or copies of the credentials for each trainee, and any other documents required by the fund source.

Due to varying funding source requirements, the Incumbent Worker Training may/may not be made on a reimbursement basis. In the case of reimbursement funding, the employer must pay for the training prior to asking for reimbursement from NOW. Reimbursements will be made to the employer within 60 days of receipt of a copy of the invoice and proof of payment for the training.

NOW may follow-up with employers receiving IWT funds for up to one year following the training end date to verify information regarding the employee(s) who received incumbent worker training, including employment status, wage information and job title.

**INCUMBENT WORKER TRAINING
APPLICATION FORM**

Name of Employer (applicant organization):	
Contact Name:	
Contact Job Title:	
Contact Phone Number:	
Contact Email:	
Company Physical Address:	
Mailing Address, if different:	
County:	<input type="checkbox"/> Benton <input type="checkbox"/> Clatsop <input type="checkbox"/> Columbia <input type="checkbox"/> Lincoln <input type="checkbox"/> Tillamook
Industry:	<input type="checkbox"/> Manufacturing <input type="checkbox"/> Healthcare <input type="checkbox"/> Leisure and Hospitality <input type="checkbox"/> Other:
Federal ID Number:	Date Established:
Number of Full-Time Workers:	Number of Part-Time Workers:
Has the company operated in Oregon for at least one year prior to the date of application? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Has the company relocated from another location resulting in layoffs in the preceding 120 days? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Is the company current on all federal, state, and local tax obligations? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Does the company have an equal opportunity/non-discrimination policy in place? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Is the company subject to a collective bargaining agreement? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If yes, and if union represented employees will be participating in the training activities of this program, it is required that consent be obtained from the representing union to collect the eligibility data from the employees PRIOR to funding approval.</i>	
Please provide a brief description of the business, product and/or service(s).	

Indicate the challenge(s) currently faced by the company that potential training would address:

- Declining sales,
- Supply chain issues,
- Adverse industry market trends,
- Changes in management behavior or ownership,
- Phasing out of certain function(s) with the introduction of new function(s) that require worker retraining,
- Required skill changes that would otherwise require downsizing, layoffs, etc. if not addressed including, but not limited to:
 - Skill changes required by external economic or market forces
 - Significant changes in technology or operating processes
 - Rapidly changing industry or occupational job requirements
 - Emergence of new products
- New technology and/or equipment implementation,
- Creation of new employment opportunities that require advance skills and knowledge, or
- Other reason justified in the application and deemed appropriate by NOW. Please explain:

Please describe the challenges that would be addressed by the proposed training.

How will this training make the employees more competitive in the economy and/or retain their employment?

How will the training make the company more competitive?

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What is the potential for wage increases within one year of training?

Please describe the training, including training vendor, curriculum, hours of training, start and projected end date of training, number of employees to receive training, location of training delivery, method of training delivery, and whether the training will result in an industry recognized credential at the end of training (include name of credential, if applicable).

Training Budget

Category	Requested Funds	Employer Contribution
Non-company instructor or tuition costs		
Training-related rentals (tools, equipment, facilities, etc.)		
Training Materials and Supplies		
Other Costs (Describe)		
Travel/per diem for Instructor		
Trainee Wages	Not Paid For by NOW	
TOTALS		

Signature

Date

	POLICY P15: WORK EXPERIENCE AND TRANSITIONAL JOBS
	APPROVED:
	<input checked="" type="checkbox"/> NEW <input type="checkbox"/> REVISED

PURPOSE

The purpose of this policy is to provide guidance for the Northwest Oregon workforce area and establish the Northwest Oregon Works (NOW) standards regarding the development and implementation of transitional jobs and work experience activities under the WIOA Title I adult, dislocated worker and youth programs. This policy is established in accordance with the Workforce Innovation and Opportunity Act (WIOA) and applicable federal and state policies and guidance.

BACKGROUND

WIOA provides for a customer-centered, job-driven workforce system that is accessible to all job seekers. The adult, dislocated Worker, and youth programs provide career and training services in WorkSource Oregon, as a part of the nation's American Job Center network.

WIOA funding allows the delivery of services that prepare eligible individuals for education and employment opportunities, attainment of education and/or skills training credentials, and attainment of employment with career opportunities. To accomplish this, eligible participants must be assessed to determine skills, interests, needs, and personal goals in order to create an individual plan for each individual seeking WIOA services.

Work experience and transitional jobs are work-based learning activities designed to provide individuals with the work readiness skills or specific job skills necessary to attain or retain employment and enhance employability. Work experiences and transitional jobs are available to eligible adults and dislocated workers in accordance with this policy. Work experience activities are also mandatory elements of WIOA youth programs.

POLICY

A work experience is a planned, structured work-based learning experience that takes place in a workplace for limited period of time. Work experience may be paid or unpaid, as appropriate. A work experience may take place in the private for-profit sector, the non-profit sector, or the public sector. Labor standards apply in any work experience where an employee/employer relationship, as defined by the Fair Labor Standards Act, exists. Funds provided for work experiences/transition al jobs may not be used directly or indirectly to displace workers by filling of a job opening that is vacant because the former occupant is on strike, or is being locked out in the course of a labor dispute, or the filling of which is otherwise an issue in a labor dispute involving a work stoppage. WIOA funds may not be used to help employers to fill positions that promote or support the use, possession or distribution of marijuana or that support or promote gambling or religious activities.

Adults and Dislocated Workers

The goal of a work experience, including transitional jobs, for adults and dislocated workers is to establish a work history for the individual that demonstrates success in the workplace and develops the skills that lead to entry into, and retention in, unsubsidized employment. Service providers are responsible for determining appropriateness of work experience and transitional jobs services based on individual assessment, needs, barriers, and ability to benefit and succeed.

Transitional Jobs

Transitional jobs are wage-paid work experiences that are subsidized up to 100 percent. Like any work experience, transitional jobs can be in the public, private, or non-profit sectors. Up to ten (10) percent of combined adult and dislocated worker funds may be used to provide transitional jobs. Due to the limited funding available for transitional jobs, service providers are encouraged to work with employers who are willing to contribute a percentage of the cost for the transitional job. The employer reimbursement rate for transitional jobs is determined by NOW on a case-by-case basis and may be up to 100 percent, depending on funding availability. Although there is no assumption that the Individual will be retained in the transitional job after the work experience is over, retention is the preferred outcome.

Transitional Jobs are a type of work experience classified as an individualized career service under WIOA adult and dislocated worker programs. These jobs are designed to enable an individual to establish a work history, demonstrate work success in an employee-employer relationship, and develop the skills that lead to unsubsidized employment.

Transitional jobs are required to be combined with comprehensive career services and supportive services. Transitional jobs are only an alternative for standard work experience when addressing special populations including individuals with barriers to employment who are chronically unemployed or who have an inconsistent work history.

A chronically unemployed individual is defined as a worker who is unemployed and has been without work for 15 or more of the last 26 weeks. A person with inconsistent work history is defined as someone who, in the 12 months prior to WIOA registration, has lacked steady, full-time, permanent employment. This work history may include season work, temporary work, part-time work (less than 32 hours per week), or other periods of employment of less than ten consecutive weeks.

Barriers to employment may include, but are not limited to, criminal history, current or past recipients of Temporary Assistance for Needy Families (TANF) or Supplemental Nutrition Assistance Program (SNAP) benefits; individuals with disabilities; individuals experiencing/experienced homelessness, and individuals from underserved races or ethnicities as defined in labor market information.

Youth

Youth work experiences are planned, structured learning experiences that take place in a workplace for a limited period of time. Work experience may be paid or unpaid, as appropriate. A work experience may take place in the private for-profit sector, the non-profit sector, or the public sector. Labor standards apply in any work experience where an employee/employer relationship, as defined by the Fair Labor Standards Act and state law. Work experiences provide youth participants with opportunities for career exploration and skill development.

Work experience for youth include summer employment opportunities and other employment opportunities throughout the year; pre-apprenticeship programs; internships; job shadowing (unpaid exposure to the workplace in an occupational area of interest); and on-the-job training opportunities. Youth participants may participate in more than one work experience during the course of their WIOA program enrollment and all youth participants should have at least one work experience prior to program exit.

A minimum of 20 percent of local area youth funds must be spent on youth work experiences. Program expenditures may include wages/stipends, staff time spent identifying potential work experience opportunities, staff time working with employers to develop the work experience, staff time spent working with employers to ensure a successful work experience, staff time spent evaluating the work experience, participant work experience orientation sessions, classroom training or the required academic education component directly related to the work experience, and orientations for employers, incentive payments directly tied to the completion of work experience. Local area administrative funds are not subject to the twenty percent requirement; and leveraged resources cannot count toward the twenty percent. Supportive services do not count toward the work experience expenditure requirement even if supportive services assist the youth in participating in the work experience.

Worksite Agreements

All work experiences require written agreement between the employer and service provider that outlines the work experience/transitional job. The agreement is designed to establish assurances and conditions and ensure eligibility and compliance with applicable laws and guidance.

REFERENCES

The Workforce Innovation and Opportunity Act (WIOA) Section 134(d)(5) 20 CFR § 678.430

20 CFR § 680.150

20 CFR § 680.190

20 CFR § 680.195

20 CFR Preamble, Sections 680.190 and .195

20 CFR § 683.270

20 CFR § 680.840

20 CFR § 680.900

Training and Employment Guidance Letter (TEGL) No. 08-15

Training and Employment Guidance Letter (TEGL) No. 19-16