

Section-04 Training	P-0400300	Effective Date: 10/21/2021
Replaces TAWDB Incumbent Worker Training dated 08/13/2020 and EWB Incumbent Worker Training dated 2019		
Delaney Rea, GCWDB Chair		

Incumbent Worker Training

The Green Country Workforce Development Board (GCWDB) provides guidance and establishes the policy regarding services for the Incumbent Worker Training program.

- I. **Incumbent Worker Training:** Incumbent Worker Training (IWT) is designed to meet the special requirements of an employer, or a group of employers within the same industry, to retain a skilled workforce or avert the need to lay off employees. IWT must be conducted with a commitment by the employer to retain or avert the layoff of the incumbent worker or workers participating in the training.

- II. **Guidance:** In addition to the steps and requirements outlined in the Oklahoma Office of Workforce Development policy #09-2019, entitled [Guidance on Incumbent Worker Training Services Provided Under the Workforce Innovation and Opportunity Act \(WIOA\)](#) dated October 29, 2019, these criteria will be used to implement the initial and subsequent eligibility policies required under WIOA.

- III. **Eligible Businesses:** GCWDB must determine an employer's eligibility for participating in IWT based on the following factors which help to evaluate whether training would increase the competitiveness of the employees or both the employees and the employer:
 - A. The characteristics of the incumbent workers to be trained and how historically they represent individuals with barriers and how such individuals would benefit from retention or advancement. Consideration should be given to employers who propose to put forth extra effort to train individuals with barriers to employment as defined in WIOA Section 3(24).
 - B. Provide a quality of training which would, whenever possible, allow the participant to gain industry-recognized training experience and/or lead to industry-recognized credentials and/ or an increase in wages;
 - C. The number of participants the employer plans to train or retrain;
 - D. The wage and benefit levels of participants (before and after training);
 - E. The occupation(s) for which incumbent worker training is being provided must be in demand;

EQUAL OPPORTUNITY AND NONDISCRIMINATION: All providers must comply with WIOA's Equal Opportunity and Nondiscrimination provisions which prohibit discrimination on the basis of race, color, religion, sex (including pregnancy, childbirth, and related medical conditions, transgender status, and gender identity), national origin (including limited English proficiency), age, disability, political affiliation or belief, or, for beneficiaries, applicants, and participants only, on the basis of citizenship status or participation in a WIOA Title-I financially assisted program or activity. Auxiliary aids and services are available upon request to individuals with disabilities.

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F. The employer is:

1. In an in-demand industry as determined by occupations on the Critical Occupations list as presented on oklahomaworks.gov;
2. In a declining industry, but there are compelling reasons (e.g., evidence of long-term viability of the employer) justifying investment in incumbent worker training.

G. The employer must not have laid off workers within 120 days to relocate to Oklahoma from another state and has been in business a minimum of eighteen (18) months.

H. The employer is current in unemployment insurance and workers' compensation taxes, penalties, and/or interest, or related payment plan. GCWDB will also evaluate the potential number of layoffs averted as a result of this training and utilization as part of a larger sector and career pathway strategy that aligns with our identified industry clusters in the region to prioritize training funds if needed. GCWDB may also prioritize employers based on their overall efforts to develop a more competitive workforce within the region and those that show ongoing apprenticeship training models. Additionally, employers that show continued opportunities for incumbent workers to advance and increase wages within their company may be prioritized. Each of the above factors leading to the approval of an incumbent worker training project with an employer must be documented and placed in the contract file.

I. Generally, IWT should be provided to private sector employers; however, there may be instances where non-profit and local government entities may be the recipients of IWT funds. For example, IWT may be used in the health care industry where hospitals are operated by non-profit or local government entities and a nursing upskilling opportunity is available.

J. Initial discussions with employers about entering into a contract for IWT will include GCWDB Business Services Representative conversations on filling vacated positions created by advancing incumbent workers with WIOA participants.

IV. **Funding Priorities:** Preference is to be given to any of the following:

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- A. Smaller businesses with less than 50 employees;
- B. Businesses located in an Opportunity Zone as defined by Oklahoma Statutes Title 68, Section 3603 Definitions, (Attachment F)
- C. Businesses located in a rural county (i.e., not a part of a metropolitan area);
- D. Training for occupations on the Critical Occupations list as presented on oklahomaworks.gov;
- E. Training provided to increase employee skills as a layoff avoidance strategy; or
- F. Training that leads to a significant upgrade in employee skills.

V. Equal Opportunity and Nondiscrimination Statement: All recipients, and subrecipients/subgrantees must comply with WIOA's Equal Opportunity and Nondiscrimination provisions which prohibit discrimination on the basis of race, color, religion, sex (including pregnancy, childbirth, and related medical conditions, transgender status, and gender identity), national origin (including limited English proficiency), age, disability, political affiliation or belief, or, for beneficiaries, applicants, and participants only, on the basis of citizenship status or participation in a WIOA Title-I financially assisted program or activity.

VI. Action

The Executive Director is responsible for compliance of this policy. The Executive Director is responsible for annual review and revisions if needed. Any exceptions to this policy statement will require prior written approval from the Executive Director or chair of the Green Country Workforce Development Board.

- Attachment A: Project Funding Proposal/Application
- Attachment B: Grantee Worksheet
- Attachment C: Employee List
- Attachment D: Anticipated Outcomes
- Attachment E: Project Rating Form
- Attachment F: Opportunity Zones

Chair, Green Country Workforce Development Board / Date

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