



**GREEN COUNTRY WORKFORCE  
DEVELOPMENT BOARD**

14002 E. 21<sup>st</sup> St.  
Suite 825  
Tulsa, OK 74134

## **Workforce Innovation and Opportunity Act**

# **Incumbent Worker Training (IWT) Policy**

Chair, Green Country Workforce Development Board

Date

No individual in the United States may, on the basis of race, color, religion, sex, national origin, age, [disability](#), or political affiliation or belief, or, for beneficiaries, applicants, and participants only, on the basis of citizenship or participation in any WIOA Title I-financially assisted program or activity, be excluded from participation in, denied the benefits of, subjected to discrimination under, or denied employment in the administration of or in connection with any WIOA Title I-financially assisted program or activity.



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Equal Opportunity Employer/Program. Auxiliary aids and services are available upon request for individuals with disabilities.

## Purpose

The purpose of this policy is to provide guidance to Green Country Workforce Development Area (GCWDA) regarding participant eligibility for Incumbent Worker Training (IWT) and employer eligibility for IWT reimbursement.

## Effective Date

Approved by GCWDB – 12.08.2022

\* This document shall supersede and replace all prior versions and understandings, oral or written, of the **Incumbent Worker Training Policy**.

**NOTE:** All GCWDB Policies and attachments are available for download at:

<https://www.greencountryworks.org/resources/policy-research-best-practices/>

## Policy

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. Incumbent workers benefit by acquiring the skills necessary to retain employment and/or to advance within the company. 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. The guidance in this issuance pertains to incumbent worker training funded with local Adult and Dislocated Worker (DLW) allocations, as well as statewide incumbent worker training activities, unless otherwise indicated.

## Incumbent Worker Eligibility

To qualify as an incumbent worker, an individual must:

- Be employed with the employer applying for IWT funds,
- Meet the Fair Labor Standards Act requirements for an employer-employee relationship (29 USC Chapter 8), and
- Have an established employment history with the employer for **six (6) months** or more.
- Fall at or below GCWDB standard for self-sufficiency prior to training, see [GCWDB Self Sufficiency policy](#).

In the event that 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 **6 months or more**, as long as a majority (**51% or more**) meet the requirement. It must be noted however, that IWT may not be used to provide the occupational training a new hire needs.

Individuals receiving incumbent worker services are not subject to the eligibility criteria that apply to participants in the Adult or Dislocated Worker (DLW) programs, unless they are receiving other services under those programs. Therefore, individuals who only receive IWT and no other WIOA title I career or training service(s) are not included in WIOA performance indicator calculations for the core programs. In order to best meet the needs of the workforce, GCWDB requests that all potential IWT participants submit a GCWDA WIOA application. Co-enrollment is encouraged when participants meet eligibility for other WIOA programs, if the participant could benefit from those services. GCWDB also encourages the use of wraparound services by all partners.

### **Development of Local Incumbent Worker Training Strategies**

This IWT policy is established and consistent with the state and local plan, as well as career pathway and sector strategy approaches for GCWDB's in demand occupations. The GCWDB sector strategies can be found in the BSR strategic plan, GCWDB local and regional plan.

GCWDB IWT funds are generally provided to private sector employees, however non-profit or local government entities may also be 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 an upskilling opportunity for nurses is available. GCWDB will consider exceptions on a case-by-case basis.

IWT may be utilized for underemployed incumbent workers that would prefer full-time employment but are working part-time within a company for economic reasons. These employees may have accepted part-time employment to gain or maintain employment with the company, or a previous dislocation has led them to accept reduced employment and often lower wages. This strategy focuses on increasing skills for underemployed frontline workers in an effort to advance the workers to more skilled positions with the same employer or industry sector, thus leading to an increase in earnings through more work hours and an increase in pay.

As part of an incumbent worker upskilling strategy, GCWDB has developed an upskilling/backfill strategy through the Business Services strategic plan, GCWDB local and regional plan, that involves filling jobs with other WIOA participants, when the positions have been vacated by workers who are moving into more advanced positions in the company.

### **Funding Incumbent Worker Training**

GCWDB may use up to **20 percent** of their combined total of Adult and DLW allocations to pay for the Federal share of IWT. Adult and DLW funding for IWT may only be used for activities that are programmatic in nature. Related administrative activities must be paid for out of GCWDB administrative funds. A locally developed IWT, utilizing Adult and DLW allocations for the Federal share of the training costs, will operate under the GCWDB IWT policy, provided that the policy is in alignment with WIOA 134(d)(4) and 20 CFR §§ 680.788 through .820.

Impact Partnership Grants (IPG) funding can be given to the GCWDB by OOWD (Office of Workforce Development) each year. As per guidance, GCWDB can elect to use their IPG funds for IWT as well. Customers participating in the Impact Partnership Strategies will be given priority in using local area IWT Funding.

Employers participating in the program are required to pay the non-Federal share of the cost of training. The non-Federal share may not be less than:

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

The non-Federal share provided by a participating IWT employer may include the amount of the wages paid by the employer to a worker while in incumbent worker training. The employer may provide the share in cash or with fairly evaluated in-kind contributions. The employer and GCWDB must track and document employer cost share contributions. An accurate accounting of the non-Federal share must be kept, including how the value of any in-kind contributions have been determined. In-kind contributions will only count toward satisfying the cost-sharing requirement if the cost would be allowable if the employer were paying the cost instead of receiving the third-party contribution.

Allowable costs are determined by the tests of reasonableness, necessity, and allocability defined in 2 CFR 200.402-405 – Basic Considerations

GCWDB IWT funds will be tracked, and employer cost share contributions documented by the GCWDB service provider and using the **GCWDB IWT Funds Tracking Tool (Attachment G)**. The completed tool and any supporting documentation provided to GCWDB IWT contract file, and All participant specific supporting documentation will be uploaded to that participant's online case file.

### Statewide and Local Incumbent Worker Training Activities

The GCWDB has elected to use the same process outlined by state guidance below for Local funding of IWT. The local area will utilize state funding when time allows for The Governor's Council to approve the process quickly and timely, otherwise the executive director can review all forms and approve local for local funding to be used.

When accessing State IWT funds rather than local Adult and DLW allocations to pay for the Federal share of IWT, the **Incumbent Worker Project Funding Proposal (Attachment A)** will be utilized as the IWT Application for the State funds.

Adherence to all requirements in this issuance is necessary for approval of State IWT activities. The following documents/forms must be completed by the employer and all information requested in the documents must be provided to the Oklahoma Office of Workforce Development (OOWD) prior to the proposal/application being sent to the Governor's Council for approval:

- Employer Request Letter on Company Letterhead;
- Project Funding Proposal (**Attachment A**);
- Grantee Worksheet (**Attachment B**);
- Incumbent Worker Training Employee List (**Attachment C**); and
- Anticipated Outcomes (**Attachment D**).

A Project Rating Form (**Attachment E**) will be completed by the members of the Workforce System Oversight Committee (WSOC) in order to make a consensus recommendation to the Governor's Council.

Please refer to the Procurement of Training section of this policy for additional requirements for the use of State IWT Funds.

Rapid Response funds may be used for State Incumbent Worker Training Activities as part of a broader layoff aversion strategy. GCWDB is receptive to recommendations made by the State or Governor's Council for providing IWT that has a state impact. GCWDB has cultivated opportunities to appropriately support employers in their efforts to develop a more competitive workforce or avert potential layoffs, and to provide advancement and wage gains opportunities to incumbent workers within their companies.

The same non-Federal share (i.e., the employer share of the cost of training), listed in the Funding Incumbent Worker Training section above, applies to IWT funded by statewide activities funds.

### Funding Priorities

Preference will be given to any of the following:

- Smaller businesses with less than 50 employees;
- Businesses located in an [Opportunity Zone](#) as defined by Oklahoma Statutes Title 68, Section 3603 Definitions;
- Businesses located in a rural county (i.e., not a part of a metropolitan area.)
- Training for occupations on the Oklahoma Critical Occupations list, found at <https://oklahomaworks.gov/wp-content/uploads/2020/10/2020-22-Critical-Occupations-List.pdf> ;
- Training provided to increase employee skills as a layoff avoidance strategy; or
- Training that leads to a significant upgrade in employee skills.

### Employer Eligibility Criteria

The GCWDB will take the following into consideration when determining the eligibility of an employer to receive IWT funding:

- The characteristics of the individuals in the program, including the extent to which these individuals represent populations with barriers to employment, as defined in WIOA 3(24);
- The relationship of the training to the competitiveness of the individual. For example, extra consideration might be given to employers who propose to increase the competitiveness of individuals with barriers to employment, such as how these individuals would benefit from measurable skills gain(s) that result in retention or advancement;
- The relationship of the training to the competitiveness of the individual and the employer;
- The occupation for which the incumbent worker is training must be an in-demand industry as defined by WIOA 3(23) or as determined by the GCWDB or planning region; and
- Other factors the GCWDB determines to be appropriate include:
  - the number of employees participating in the training;
  - the wage and benefit levels of the participating employees at the beginning of training and anticipated upon completion of training. The new wage rate after training is completed must be higher than the employee's prior wage rate;

- the existence of other training and advancement opportunities provided by the employer;
- the quality of the training, as evidenced by industry-recognized training experience and credentials;
- layoffs averted as the result of the training; and
- utilization of IWT as part of a larger sector and/or career pathway strategy.

IWT is designed to increase the competitiveness of the employer by developing a highly skilled workforce that will result in increased business financial viability, stability, competitiveness, and productivity. To avert the risk of closing, IWT may be developed with a business or business association to maintain their competitive status, incorporate new technology, or prevent downsizing. Process improvements that contribute to the competitiveness and productivity of a business are allowed as a component of IWT, when combined with training that results in new skill attainment for incumbent workers. However, training that is necessary for employers to meet federal “safe workplace” requirements, (e.g., OSHA, food handler certifications, etc.) is **not considered IWT**.

The competitiveness of workers participating in IWT may be increased by enhancing existing skills, learning new skills, and earning employer or industry-recognized credentials, in addition to retaining employment, maintaining their careers, and increasing their earnings potential by five percent **(5%) of their gross wage** upon successful completion of training. An ideal IWT project allows the opportunity for employers to promote incumbent workers with increased skill levels, which creates backfill opportunities for other WIOA participants, including less skilled or underemployed employees within the company, or for WIOA participants seeking employment.

### Procurement of Training

The IWT program does not utilize an individual training account (ITA) to fund training for Adults and Dislocated Workers. In order to provide incumbent worker training with State funds, **Attachment A- Incumbent Worker Project Funding Proposal** (also referred to as the IWT Application or IWT Agreement) must be completed and signed by both the WIOA Project Lead and the Employer. The Funding Proposal/IWT Application must be approved by the Governor’s Council prior to the start of incumbent worker training when IWT is funded by Statewide Activities Funds.

The following information is required regardless of whether incumbent worker training is funded with local Adult and DLW allocations or with the Allowable Statewide Employment and Training Activities funds listed at WIOA sec. 134(a)(3):

- the process for documenting the incumbent worker’s **six-month** work history requirement with the employer;
- the amount of the employer’s non-Federal share, based on the size of the employer’s workforce;
- a statement regarding the expectation that once incumbent workers advance with the employer, the employer then provides an opportunity to GCWDB to fill the now vacant position with a local WIOA participant, whenever possible;
- the process for documenting how employer cost match contributions will be tracked and documented in the employer’s, GCWDB’s, and the Service Provider’s files;
- the methodologies for determining the value of in-kind contributions and how contributions are documented in the approved project funding proposal/application, all of which must conform to the cost match requirements at 2 CFR § 200.306;

- local monitoring requirements;
- other documentation required by the local area;
- assurances as required in the Regulatory and Prohibited Activities section of this issuance;
- commitment by the employer to share required performance data with GCWDB;
- nondiscrimination and Equal Employment Opportunity (EEO) assurances, including complaint processing and compliance reviews;
- start and end date of the IWT Agreement; and
- IWT limits, including the length of the approved IWT and funding amounts.

### Allowable and Unallowable Costs

**Allowable costs** may include only costs directly related to training. Allowable costs may include:

- Instructor/trainer salaries;
- Curriculum development, textbooks, manuals, training software, materials, and non-consumables; and
- Other necessary and reasonable costs directly related to training.

**Unallowable costs** include, but are not limited to:

- Foreign travel;
- Purchase or lease of capital equipment;
- Encouragement or inducement of a business or part of a business to relocate from any location in the United States; and
- Use of IWT funds to pay for a worker's wages or benefits during training.

### Regulatory Limitations and Prohibited Activities

Businesses that fail to meet any of the following criteria are not eligible to receive funds for IWT:

- Businesses must not be presently debarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from participation in transactions by USDOL (United States Department of Labor) or the State of Oklahoma. Below are some websites that may be helpful in checking tax, environmental compliance, and debarment status.
  - Federal Exclusion and Debarment Site: <http://www.sam.gov>
  - Oklahoma Tax Commission: <https://www.ok.gov/tax/>
  - Oklahoma Employment Security Commission: [www.ok.gov/oesc](http://www.ok.gov/oesc)
  - Business Filing Search: <https://www.sos.ok.gov/>
  - Oklahoma Department of Environmental Quality: <http://www.deq.state.ok.us/OEA/index.html>
- Businesses shall not have any outstanding tax liability to the State of Oklahoma for over six months. GCWDB and GCWDB service provider staff will require the businesses to disclose any known outstanding tax liabilities, including those with other states, prior to entering into the contract.
- The GCWDB and GCWDB service provider staff shall consider existing out-of-state violations when determining eligibility to receive IWT funds.

- GCWDB and GCWDB service provider staff must document any resolution of outstanding tax liability, which may include letters from the business or from the State in which the tax liability occurred.
- Businesses must ensure that they have no more than one unfair labor practice contempt of court finding. <http://www.oklegal.onenet.net/ok.agency.decisions.basic.html>
- Oklahoma businesses must have all of the approvals, licenses, or other qualifications needed to conduct business in the state and all must be current. Should this status change during the course of the local IWT program activities, resulting in the business's disqualification from conducting business in Oklahoma, all training under the IWT program must cease.
- IWT funds may not be used, or proposed for use, to encourage or induce the relocation of a business or part of a business if the relocation would result in a loss of employment for any employee at the original location when the original location is within the United States.
- Businesses that have relocated to Oklahoma and have laid-off workers at their former location in the United States may not be considered for this program until they have been in operation at the new location for **120 days**.
- To verify that a business is not relocating employment from another area, a pre-award review must be undertaken and documented by GCWDB and GCWDB service provider staff. The review must include:
  - the names under which the establishment conducts business, including predecessors and successors in interest;
  - the name, title, and address of the company official certifying the information, and
  - whether WIOA assistance is being sought in connection with past or impending job losses at other facilities of their company.
- The pre-award review should also include a review of whether appropriate notices have been filed, as required by the Worker Adjustment Retraining Notification (WARN) Act. The review may also include consultations with labor organizations and others in the affected local area(s).
- Businesses must not have any outstanding civil, criminal, or administrative fines or penalties owed to or pending in the state of Oklahoma.
- Funds provided to employers for IWT must not be used to directly or indirectly assist, promote, or deter union organizing.
- Funds provided to employers may not be used to aid in the filling of a job opening, directly or indirectly, 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.
- All general fiscal and administrative rules listed at 20 CFR, Chapter V, Part 683, Subpart B – Administrative Rules, Cost, and Limitations apply.

## Monitoring

The employer agrees that at any time during normal business hours, and as often as deemed necessary, GCWDB or GCWDB service provider staff, the State of Oklahoma, the U.S. Department of Labor, or other authorized federal agencies or their agents may inspect and monitor any records or activities pertaining to a GCWDB IWT contract. Such an inspection shall be made to determine if the employer is in compliance with the terms and provisions of an IWT contract and if the IWT employee is making sufficient progress.



## Authorization for Clarifications and Additions

GCWDB authorizes the GCWDB Executive Director to issue additional instructions, guidance, approvals and/or forms to further implement requirements of this policy, without making substantive change to the policy except in situations where new or updated State and Federal guidance is issued.

## History

- Replaces GCWDB P-0400300, Incumbent Worker Training, previously GCWDB approved and effective: 10.21.2021
- GCWDB Approved and Effective 12.08.2022

**Note\*** This document shall supersede and replace all prior versions and understandings, oral or written, of the Incumbent Worker Training Policy.

## References

- WIOA 134(a)(3)
- WIOA 134(d)(4)
- WIOA 133(b)
- WIOA 181(d)(2)
- WIOA 194(13)
- 20 CFR §§ 680.320, 680.530, and 680.780 – 840
- 20 CFR § 683.200
- 2 CFR § 200
- TEGL 19-16 – Adult / Dislocated Worker
- 29 CFR § 38.25 - A grant applicant's obligation to provide a written assurance.
- 29 USC Chapter 8 – Fair Labor Standards
- OWDI 14-2017, Change 2 - Rapid Response Activities and Layoff Aversion
- OWDI 07-2018 – Supplemental Information Collection
- OWDI 03-2022 - Guidance on Incumbent Worker Training Services Provided Under WIOA

## Attachments

<b>Attachment A:</b>	Project Funding Proposal/Application
<b>Attachment B:</b>	Grantee Worksheet
<b>Attachment C:</b>	Employee List
<b>Attachment D:</b>	Anticipated Outcomes
<b>Attachment E:</b>	IWT Project Rating Form
<b>Attachment F:</b>	IWT Applicant Scoring Sheet
<b>Attachment G:</b>	Incumbent Worker Training Funds Tracking Tool
<b>Attachment ZZ:</b>	Vital Service and Information Notice

**NOTE:** All GCWDB Policies and attachments are available for download at:

<https://www.greencountryworks.org/resources/policy-research-best-practices/>



## Incumbent Worker Project Funding Proposal/Application

This agreement is between \_\_\_\_\_, and Green Country Workforce Development Board. Both parties agree to the terms of this agreement as set forth below. Project is expected to commence on \_\_\_\_\_ and terminate on \_\_\_\_\_.

### Project Lead

Contact Name:	Title:
Phone:	Email:
Business/Organization:	

### EMPLOYER INFORMATION

Legal Business Name:	
Owner/Officer:	Phone:
Physical Address:	
Mailing Address (If different than physical):	
Is above company a subsidiary or affiliate: Yes No (If yes provide information below if different than above)	
Legal Business Name:	
Authorized Representative:	Phone:
Physical Address:	
Mailing Address (If different than physical):	
Employer Sector: Healthcare Manufacturing Transportation Construction Finance Other:	
Is Employer expanding: YES NO	Length of time in business at this address:
Has the employer laid off workers within 120 days prior to relocation in OKLA from another state: YES NO	
Employers FEIN #:	UBI #:
Legal Structure of Business:	Tax Structure of Business:
The employer is current in unemployment insurance and workers' compensation taxes, penalties, and/or interest or related payment plan: YES NO	
Number of employees scheduled to participate in training:	

Total number of employed by employer in state and nationally:

Is Employer subject to a collective bargaining agreement: Yes No

(If yes, provide a letter of endorsement/concurrence from the authorized union official.)

Does the company meet any funding priorities as per **OWDI #03-2022**: Yes No

What is the type of priority or what are the priorities?

Provide a brief description of what is done at this location:

### Project Overview

Description of Need:

List of Partners:

Project Timeline:

Will the Project Result in: *Increased Employee Wages Avert Future Layoffs Other:*

## EMPLOYER RESPONSIBILITIES

1. Provide the information below as required for employer and each employee participating in the approved project opportunity utilizing approved documentation.
2. Agrees to work with **GCWDB** to identify and provide the employers process for complying with the required cost sharing requirements for this training, as determined by the size of the employer's workforce. *(Wages paid to the participant while in training can be included as part of that share and the share can be provided as cash or in-kind that is fairly evaluated and approved by GCWDB.*
  - At least **10 percent** of the cost for employers with **50** or fewer employees
  - At least **25 percent** of the cost for employers with more than **50** employees but not more than **100** employees; and
  - At least **50 percent** of the cost for employers with more than **100** employees
3. Complete required close out report within **30 days** of completion of training.
4. Complete the following regarding the total cost of the program, including employer contribution:

Employer Cash:	Total Cost of Project:
Employee Wages:	Percentage Covered by Employer:
Employer In-Kind:	Total Requested from GCWDB:
Total Employer Contribution:	Percentage Covered by GCWDB:

*Describe Employer Contribution:*



<b>Required Project Documentation</b>
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**Employer****For Each IWT Employee**

- Employer Request on Company Letterhead*
- Proof of Worker's Compensation Coverage*
- W-9*
- Project Funding Proposal, **Attachment A***
- Grantee Worksheet, **Attachment B***
- IWT Employee List, **Attachment C***
- Anticipated Outcomes, **Attachment D***
- Project Rating Form, **Attachment E***

- GCWDB WIOA Application+*
- Photo ID*
- Social Security Number*
- Consent for Sharing of Confidential Information*
- Form I-9, Employment Eligibility Verification Completed from Employer File*
- OKJobMatch Account*

<b>Project Lead &amp; EMPLOYER ASSURANCE</b>
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**EQUAL OPPORTUNITY AND NONDISCRIMINATION STATEMENT:** All Recipients, and Sub recipients/Sub grantees 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.

**Project Lead:****Employer – Owner/Designated Officer:**


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 Print First/Last

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 Print First/Last

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 Signature

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 Signature

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 Date

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 Date

*This Incumbent Worker Training (IWT), opportunity is brought to you by a grant funded in alignment with the Workforce Innovation and Opportunity Act (WIOA) and provided by the U.S. Department of Labor. This is a project led by the (local workforce development board).*



## Green Country Workforce Development Board Grantee Worksheet

**BUDGET NARRATIVE**

Add additional pages as necessary.

**TRAINING COSTS**

Description	Detail	Budget Amount	Employer Match
		0.00	0.00
		0.00	0.00
		0.00	0.00
		0.00	0.00
Subtotal		\$ -	\$ -

**PERSONAL SERVICES**

Description	Detail	Budget Amount	Employer Match
		0.00	0.00
		0.00	0.00
		0.00	0.00
		0.00	0.00
Subtotal		\$ -	\$ -

**TRAVEL**

Description	Detail	Budget Amount	Employer Match
		0.00	0.00
		0.00	0.00
		0.00	0.00
		0.00	0.00
Subtotal		\$ -	\$ -

**CONTRACTUAL**

Description	Detail	Budget Amount	Employer Match
		0.00	0.00
		0.00	0.00
Subtotal		\$ -	\$ -

**SUPPLIES**

Description	Detail	Budget Amount	Employer Match
		0.00	0.00
		0.00	0.00
Subtotal		\$ -	\$ -

**ADMINISTRATION**

Description	Detail	Budget Amount	Employer Match
		0.00	0.00
		0.00	0.00
Subtotal		\$ -	\$ -
<b>Total</b>		<b>\$ -</b>	<b>\$ -</b>

**Grantee Name** \_\_\_\_\_  
**Program, File #** \_\_\_\_\_  
**Original Agreement** \_\_\_\_\_







## Anticipated Outcomes of Incumbent Worker Training

**Employer:**

<b>Section 1.</b> Check all that are applicable	
<input type="checkbox"/> Will help prevent possible relocation of operations (layoff aversion)	<input type="checkbox"/> Will make this location more competitive
<input type="checkbox"/> Will assist in the training of target groups or make employees more competitive	<input type="checkbox"/> Important to the stated mission of our company
<input type="checkbox"/> Will contribute to the long-term viability of our company	<input type="checkbox"/> Will contribute to the short-term viability of our company
<input type="checkbox"/> Will be an important component of our company’s overall workforce development efforts, such as sector or career pathway strategy	<input type="checkbox"/> Will assist in the improvement of international trade opportunities
<b>Section 2.</b> At least six of the following ten must be completed	
Will save _____ jobs within the company	Will create _____ openings in entry-level positions
Will create _____ new jobs within our company	Will improve unit or labor costs by _____ percent
Will lower turnover in our company by _____ percent	Will increase overall efficiency by _____ percent
Will Increase profit margin by _____ percent over the next _____ months	Will increase or retain sales by _____ percent over the next _____ months
Will improve the long-term wage levels of trainees by _____ percentage	Will improve the short-term wage levels of trainees by _____ percentage
<b>Return on Investment Information</b>	Planned ROI is expected to be _____ percentage over _____ months / years

I certify information provided is true and correct to the best of my knowledge.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Green Country Workforce Development Board

Project Rating Form – Future of Work	
<b>APPLICANT:</b>	
<b>Contact Name &amp; Title:</b>	
<b>County:</b>	
<b>REVIEWER NAME:</b>	
<b>REVIEW DATE:</b>	
<b>Interview Questions:</b>	
Please rate project on the questions below. The scoring range goes from 0 – 5, 0 being the worst, 5 being the best. Please score the project and make any comments or notes needed.	
<b>1. What is the training? How many employees will attend? What is the duration? What is the requested funding? What is the company contribution? Who is the training entity?</b>	<b>Score:</b>
Comments:	
<b>2. How will the training benefit the region, the employees, and the employer? Why is this training needed? Will it avert future layoffs or upskill employees to meet promotional requirements?</b>	<b>Score:</b>
Comments:	
<b>3. Is the training and/or employer directly associated with one of the local/regional priority ecosystems (Healthcare, Energy, Manufacturing, Transportation, Construction or Finance?)</b>	<b>Score</b>
Comments:	

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<b>4. Will the training include a nationally, regionally, or industry recognized certificate?</b>	<b>Score:</b>
Comments:	
<b>5. Is the project aligned with an industry association partnership, such as an EDC, or other such business supported agency?</b>	<b>Score:</b>
Comments:	
<b>6. Beyond the required in-kind/cash match, does the application for funds include additional funding to support the project?</b>	<b>Score:</b>
Comments:	
Reviewer signature: _____ Date _____  Overall Score: _____/30	



<b>Name of Applicant (Region or Organization):</b>	
<b>Amount Requested:</b>	
<b>Funding Amount Recommended:</b>	
<b>Total Score:</b>	<b>0</b>

ELIGIBILITY		
Applicant is Eligible	Applicant is Ineligible	Applicant meets all criteria outlined in OWDI 09-19 and all required documents were submitted (Attachments A-E).
Points Awarded	Total Points Available	Criteria
PREFERENTIAL POINTS		
	1	Applicant is located in an Opportunity Zone as defined by Oklahoma Statutes Title 68, Section 3603 definitions
	2	Applicant is located in a rural county (i.e., not a part of a metropolitan area)
	6	Training is part of a layoff aversion strategy
	5	Training is for occupations that are on the Critical Occupations List and/or are on a career pathways to an occupation on the Critical Occupations List
	3	Applicant has 50 employees or less
	3	Training leads to a significant upgrade in employee skills
<b>Section 1:</b> The application must address the following questions. (1) What is the training? (2) How many employees will attend? (3) What is the duration? (4) What is the requested funding? (5) What is the company contribution? (6) Who is the training entity?		
	3	Description of the length of training.
	2	Inclusion of training provider on the Eligible Training Provider List.
Points Awarded	Total Points Available	Criteria
<b>Section 2:</b> (1) How will the training benefit the region, the employees, and the employer? (2) Why is this training needed? (3) Will it avert future layoffs or upskill employees to meet promotional requirements?		
	5	Description of the training, including a description of how the training is tied to a larger strategy to upskill workers, benefit the employer's sustainability or growth, and how the region will be impacted.
<b>Section 3:</b> Is the training and/or employer directly associated with one of the local/regional priority ecosystems?		
	5	Description of how the training and/or employer is associated with the local/regional priority ecosystem(s).
<b>Section 4:</b> Will the training include a nationally, regionally, or industry recognized credential?		
	5	Description of training and any associated credential(s).
<b>Section 5:</b> Is the project aligned with an industry association partnership, such as an EDC, or other such business supported agency?		
	5	Description of the project's alignment to or partnership with an industry association business supported
<b>Section 6:</b> Beyond the required in-kind/cash match, does the application for funds include additional funding to support the project?		
	5	Identification of funding and resources allocated to the project by the employer.
<b>0</b>	<b>50</b>	

