

Grant Program Announcement

Issue Date: July 20, 2023



INCUMBENT WORKER TRAINING GRANTS Fiscal Year 2023 – 2024

Applications for Fall 2023 are Due at Noon (12:00 PM) on Friday, August 25, 2023
Applications for Spring 2024 are Due at Noon (12:00 PM) on Friday, December 1, 2023.

All questions and completed applications must be submitted to: contact@forwardcareers.org

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ABOUT INCUMBENT WORKER TRAINING (IWT) GRANTS

Boost Your Employees' Skills!

In today's ever-changing marketplace, the importance of job training has never been greater. Our Incumbent Worker Training (IWT) grant is a way to keep your organization competitive. The IWT grants provide funding to employers who want to upgrade the skills of their current employees to enhance their expertise in the workplace, avert layoffs, and make their business more competitive.

How it Works!

- Participating businesses must have a facility located in Wisconsin.
- Employers select the training to be provided to their employees.
- Trainings may range from 1 day to 16 weeks.
- Employers complete and submit an application, a detailed training description, training invoice, trainee form(s) and job description(s) for each employee going to the training. Please note that the training program cannot have started and must be a new training program that will start between the time periods listed below.
- After the employees successfully complete the training, the employer may be reimbursed between 25% and 75% of costs of training their workers dependent upon training outcomes. Training costs cannot include travel, equipment, training supplies or materials such as books, manuals, etc.

Businesses interested in this grant opportunity may apply for the Fiscal Year 2023-2024 funding cycle to offer training programs that will be delivered to their workforce between the following periods:

- **Fall 2023:** Training programs may range from 1 day to 16 weeks and be held between October 1, 2023 and June 14, 2024.
- **Spring 2024:** Training programs may range from 1 day to 16 weeks and be held between January 1, 2024 and June 14, 2024.

To be considered for a grant, the proposed training cannot start before the listed dates above.

This is a great opportunity to plan for training programs that have been delayed due to limited resources and to further engage your workforce for positive results.

BENEFITS

The IWT program provides a win-win situation for all.

Benefits for **businesses** include:

- Increased Competitiveness
- Skilled Workforce
- Increased Productivity
- Increased Profits
- Company Growth
- Reduced Turnover

Benefits for **employees** includes:

- Advancement Opportunities
- Increased Job Opportunities
- Industry-Recognized Credentials
- Transferrable Skills
- Job Retention
- New Skills for Continued Growth

ELIGIBLE BUSINESSES

An eligible applicant is a business across any industry sector that:

- Has been in continuous operation for the 12 months immediately prior to the application submittal,
- Agrees to cooperate with the data collection requirements, and
- If a past IWT grant participant, has a successful history with IWT's and all requirements.

Where a union bargaining agreement exists and is applicable to the training for the employee, the IWT program must not conflict with that agreement. The business must obtain written concurrence of the bargaining unit. Written concurrence must be submitted with the IWT application in order for the contract to be reviewed for approval. Funds provided to businesses for the IWT program must not be used to directly or indirectly assist, promote or deter union organizing.

ELIGIBLE INCUMBENT WORKER

To qualify a current employee as an incumbent worker, the employee must:

- Be directly employed by the company for a period of no less than 6 months*,
- Be at least 18 years of age,
- Work at least 32 hours per week,
- Earn an hourly wage above the state minimum wage,
- Agree to cooperate with the data collection requirements, and
- Meet the Fair Labor Standards Act requirement for an employer-employee relationship.

In the event that the incumbent worker training 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 of those employees being trained do meet the employment history requirement.

FUNDING LEVELS

IWT funds will be used to reimburse businesses providing training on a graduated scale based on the size of a business and results of credential attainment, wage increase, and promotion resulting in an open position. Such participating employers must pay the remaining share of the costs not covered.

For example, ABC Company will train one worker that will result in a credential attainment and a wage increase upon completion of the training. The size of company is 80 and the total cost of the training is \$5,000.

ABC Company will tentatively receive a total reimbursement of \$3,250 ($\$5,000 \times 65\%$).

Refer to the following chart for potential reimbursement levels.

		Reimbursement is Based Upon Receiving One or More of the Following		
		1. Credential Attainment	2. Credential Attainment + Wage Increase or Promotion	3. Credential Attainment + Wage Increase + Promotion
Business Size	100 or Fewer Employees	50%	65%	75%
	More than 100 Employees	25%	40%	50%

Note: The business size is calculated based on the number of employees the company has in Wisconsin and does not include employees located in other states.

Grant Amounts: IWT funds are limited and are therefore awarded as funds are available. The maximum reimbursement award amount may not exceed \$10,000 per business per program year.

TRAINING CRITERIA

This training grant announcement is open to all industry sectors. Factors to consider when submitting an application include the following requirements and options:

Required

- Training does not only improve the skills of employees but also improve the business's processes and competitiveness and/or avert a layoff.
- Training will result in an industry recognized certificate or credential.
- **Training may be provided between the dates of October 1, 2023 and June 14, 2024.**
- Training may range from 1 Day to a maximum of 16 Weeks.
- Past or in progress trainings are not eligible. Must be a future training.
- Training must not begin prior to award notification and contracts being fully executed.

Optional

The following are components of the training programs that would strengthen the application, but are not required.

- Training shows at least 20 current openings with a median salary of at least \$34,000, but not required.
- Training applications may be submitted for a group of businesses, but not required.
 - If funding is limited, preference will be given to a group of businesses to maximize training dollars.
- Training may be for a group of employees, but not required.
 - If funding is limited, preference will be given to group trainings to maximize training dollars.
- Training may be provided by a registered training provider listed on the state's Eligible Training Program List (<https://dwd.wisconsin.gov/etpl/home/programsearch>) and/or coincides with Wisconomy's Long-Term Occupation Projections List (<https://jobcenterofwisconsin.com/wisconomy/pub/occupation.htm#Viz>) for WDA 3, but not required.
- Training completions that will result in a wage increase and/or promotion resulting in an open position [per WIOA section 134 (d)(4)(A)(ii)] will be given preference, but not required.

TRAINING RESTRICTIONS - This is not a definitive list.

- Trainings excludes c-suite positions, top-level executives, and individuals at the top of their career ladder.
- Funds provided cannot be used to pay the wages of incumbent worker employees during their participation in an economic development activity provided through a statewide workforce development system.
- When a relocation of a business results in the loss of employment of any employee of such business, no funds provided for employment training can be used for incumbent worker training until after 120 days has passed since the relocation that caused the loss of employment at an original business location in the United States.
- Funds will not be used to cover travel, equipment, training supplies or materials such as books, manuals, etc.
- Businesses administering a current Wisconsin Fast Forward and/or Workforce Advancement Training (WATS) grants, or similar grants, are not eligible to receive IWT funds.
- Training for an employee who is employed through a temporary employment agency is not allowed. IWT may be utilized with an established business to train an employee that has been employed by the company for a period of no less than 6 months.
- Required/regulatory training – training mandated by any other public agency or department is not eligible. These trainings may include, but are not limited to EPA, Hazardous Waste, FDA, Workers Compensation, OSHA, etc.
- Training which would result in advanced degrees such as associate, bachelor, master, or doctorate.
- Training already being reimbursed by another state or federal training program (e.g., Other Workforce Development Boards, National Emergency Grants, etc.).
- Employee travel, food, or lodging costs related to program participation.
- Wages of trainees while being trained.
- Purchases of capital equipment or other durable (long lasting/reusable) training materials/equipment.
- Training in sectarian activities.

Examples of Acceptable Trainings:

- Training to gain or maintain an industry recognized certificate/credential.
- CD-10 training – training that teaches coding professionals how to become proficient in the ICD-10-CM and ICD-10-PCS coding or other similar systems.
- Training for improved process efficiency as identified by industry professionals.
- Training from a national, regional, or state trade association that offers an independently certified training curriculum and testing.
- Training provided in conjunction with the purchase of a new piece of equipment or in automating production systems.
- Upgrade of computer skills (e.g., Microsoft Excel, Access).
- Seminars/workshops/webinars are eligible, however, they must have an assessment or “test” tied to it to be eligible for this program. Businesses must indicate in the application what assessment of skills is included for this type of training to justify it will improve economic competitiveness. Failure to include this may exclude the application from consideration.
- English Language Learning for managers or staff to enable them more effectively communicate with limited English employees.

TIMELINE & DEADLINES

Training programs may range from 1 day to 16 weeks.

Date Deadline	Item
Fall 2023 Applications 12:00 P.M. on Friday, August 25, 2023 <i>If approved with a signed contract, training may start on October 1, 2023.</i>	Deadline for application submissions must be received via email to contact@forwardcareers.org . Only fully completed applications submitted via email will be accepted. Please attach all required attachments.
Spring 2024 Applications 12:00 P.M. on Friday, December 1, 2023 <i>If approved with a signed contract, training may start on January 1, 2024.</i>	Deadline for application submissions must be received via email to contact@forwardcareers.org . Only fully completed applications submitted via email will be accepted. Please attach all required attachments.

NOTE: Failure to submit documents by due dates will result in applications being denied.

SCORING

Proposals will be ranked using the following scorecard. Based upon funding level and scores, trainings will be approved in order based upon their overall scores. If there is limited funding and two proposals have the same score, preference will be given to the smaller sized business of the two. Size will be determined based on business location with the Waukesha, Ozaukee, and Washington Counties.

A maximum of 100 points are possible under the following criteria:

Training Type and Outcome (Max of 20 points)

- Training results in an industry recognized certificate or credential (10 pts)
- Training type shows at least 20 current openings with a median salary of at least \$34,000 (10 pts)

Number of Businesses Benefiting from the Training (Max of 15 points)

- Two businesses are submitting the proposal together. (2 pts)
- Three businesses are submitting the proposal together. (5 pts)
- Over three businesses are submitting the proposal together. (8 pts)

Number of Trainees Benefiting from the Training (Max of 35 points)

- One trainee will be trained. (5 pts)
- Two to five trainees will be trained. (8 pts)
- Six to ten trainees will be trained. (10 pts)
- Over ten trainees will be trained. (12 pts)

Type of Training Provider (Max of 5 points)

- Training provider is listed on the state's Eligible Training Provider List (5 pts)

Long-term Training Outcomes (Max of 25 points)

- Training will result in a wage increase (10 pts)
- Training will result in a promotion resulting in an open position (15 pts)

APPLICATION CHECKLIST

NOTE: Incomplete applications with missing supporting documents will not be accepted.

Item	Status
<p><input type="checkbox"/> Submission of an accurate and fully completed Incumbent Worker Training (IWT) Application with the following:</p> <p><input type="checkbox"/> Trainee Form(s): For each employee that will participate in the training program, a trainee form must be submitted with IWT application. Example, 5 employees will be trained in ABC training program, 5 completed trainee forms are submitted with IWT application.</p> <p>Refer to "Trainee Form".</p> <p><input type="checkbox"/> An invoice that details the 1) training and learning objectives, 2) dates of training, 3) attainment of industry recognized certificate or credential, and 4) itemized cost.</p> <p><input type="checkbox"/> Job description(s) for each employee(s) to be trained.</p> <p>NOTE: if the training is for a seminar, workshop, or webinar, there must be a test or assessment provided.</p>	<p>Required documents.</p>
<p><input type="checkbox"/> In-House Training Invoice: If training is occurring in-house, a letter on company letterhead, that details costs, may be submitted.</p> <p>Refer to "In-House Training Template".</p>	<p>Required only if training is being conducted in-house</p>
<p><input type="checkbox"/> Union Form: Where a union bargaining agreement exists and is applicable to the training for the employee, submit a Union Concurrence Form.</p> <p>Refer to "Union Form".</p>	<p>Required only if employee(s) participating in training are in a union.</p>

APPENDICES

- A. Application Form *(Required)*
- B. Trainee(s) Form, Invoice, Training Description, and Job Descriptions *(Required)*
- C. In-House Training Template *(Required only if training is conducted in-house)*
- D. Union Form *(Required only if employee(s) are in union)*

SECTION I. BUSINESS INFORMATION

Company Name: _____

Mailing Address: _____

City: _____ **County:** _____ **State:** _____ **Zip:** _____

Main Contact Name: _____ **Title:** _____

Phone: _____ **Fax:** _____ **Email:** _____

NAICS Code (6 digits): _____ **What year was the business established?** _____

Has the business experienced a layoff in the last 120 days due to a relocation? Yes No

Does the business have a union bargaining agreement? Yes No

Is the business currently receiving funding from Wisconsin Fast Forward, WAT, or another Workforce Program? Yes No

Has the business participated in incumbent worker training utilizing WIOA funds in the past?
 Yes No

Company Size in Wisconsin: _____ **Company Size in Waukesha, Ozaukee, and/or Washington Counties:** _____

SECTION II. TRAINING PROGRAM INFORMATION

Name of Proposed Training Program: _____

Training Date(s): Starts (mm/dd/yy): _____ Ends (mm/dd/yy): _____

Training Location: On Site Remote Site At a training institute: _____
(institution name)

Total Training Cost: _____ **Actual No. of employees to be trained:** _____

Is this training needed to avert layoff and/or to keep the employee(s) retained in employment?
 Yes No

Are all employees, who will be sent to this training, been employed for 6 months or longer?
 Yes
 No – If not, how many from the total number of employees have not been employed for 6 months or longer: _____.

SECTION: III TRAINING PURPOSE

Please provide a description of the training (detail of the curriculum and what the employee(s) will learn):

[Empty box for training description]

Why is this training needed for your business?

[Empty box for business need explanation]

How will this training component directly contribute to improving company processes, improve efficiency, or quality in a way that makes the company more competitive?

How will this training increase the employees' skill level or prevent the employee from being laid off and/ or avert layoff?

Please list any special tools, equipment, uniforms or protective gear required for the position.

SECTION IV: BUSINESS AGREEMENT & SIGNATURE

REQUIRED ATTACHMENTS WITH APPLICATION:

Trainee Form(s): For each employee that will participate in the training program, a trainee form must be submitted with IWT application. Example, 5 employees will be trained in ABC training program, 5 completed trainee forms are submitted with IWT application. – Refer to “Trainee Form”.

Invoice that includes:

- Training and learning objectives
- Dates of training
- Attainment of industry recognized certificate and/or credential
- Itemized cost

Job descriptions of each employee’s position to be trained

REQUIRED ONLY IF:

In-House Training Invoice: If training is occurring in-house, a letter on company letterhead that details training and learning objectives, dates of training, attainment of industry recognized certificate and/or credential, and itemized costs may be submitted. - Refer to “In-House Training Template”.

Union Form: Where a union bargaining agreement exists and is applicable to the training for the employee, submit a Union Concurrence Form. – Refer to “Union Form”.

IMPORTANT: Please ensure all application fields are completed and supporting documents are submitted with this application. Incomplete applications with missing supporting documents will not be accepted. Questions may be submitted to contact@forwardcareers.org.

If awarded, in order to receive reimbursement for training, within 30 days upon the completion of training the business must submit:

1. Paid invoice(s) for training expenditures,
2. Proof of wage increase, and/or proof of promotion resulting in an open position on company letter head – if applicable,
3. Copy of employee(s) credential(s) showing successful completion – if applicable,
4. If training is not credential, employee(s) name(s) who successfully completed training on training provider’s letterhead,
5. Complete post training follow-up questionnaire upon request from Forward Careers staff; and
6. Provide follow-up for one calendar year on training activities.

*The Business is responsible to notify Forward Careers of any changes to training proposal outline **before** the training start date. Failure to notify Forward Careers will result in a terminated contract. After two (2) terminated contracts your business will not be eligible for training for one (1) calendar year.*

By submitting this application, the business representative agrees that information is true and agrees to provide post-training documents. Yes No

Name of Representative: _____ **Date:** _____