



Employed Worker Training Program Guidelines

July 2018 – Jun 2019

A proud partner of the  AmericanJobCenter® network

CareerSource Okaloosa Walton is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. Telecommunications Relay Service is available using TTY/TDD equipment via the Florida Relay Service at 711.

PURPOSE

The purpose of the Employed Worker Training (EWT) program is to provide grant funding for the continuing education and skills upgrade of existing employees at Okaloosa Walton businesses. The program reimburses companies up to 50% for direct training related costs.

Training funded under the EWT should lead to skill attainment and benefit employees by making them more qualified in their industry and/or by providing them with new skills to meet new product or process requirements. It is desired that the training results in credentials or industry recognized skills that promote the worker's career and increases their overall employability.

PROGRAM OBJECTIVES

- To increase Florida businesses' ability to compete, expand, and retain employees;
- To improve the effectiveness of the business operations;
- To upgrade the skills of existing employees resulting in certificates, increased wages, or career advancements and;
- To assist companies with layoff avoidance strategies

AVAILABLE FUNDING

Companies may receive up to \$3,500.00 per trainee/employee based on need and funding availability. Employers must pay **(In-kind and/or cash)** at least 50% of the total training cost.

EMPLOYER ELIGIBILITY

Employers applying for the EWT program must meet the following eligibility criteria:

- Business location must be in Okaloosa or Walton county
- Must be in operation for a minimum of one year prior to the application date
- Be a for-profit company (Non-profit organizations may be eligible depending on the training project)
- Demonstrate a commitment to retain or avert the layoff of employees receiving training
- Demonstrate how the training relates to the competitiveness of both the business and the employee receiving training (i.e. *how the training will affect the competitiveness and/or the operations of the business; how the training will benefit the trainee resulting in increased wages, career advancement, etc.*)
- Demonstrate a commitment to paying at least 50% of the total cost of the training
- Have at least one full-time employee (**Note:** *Employee must be a W-2 employee*)
- Compliant with the non-discrimination and equal employment opportunity provisions of Section 188 of the Workforce Innovation and Opportunity Act of 2014

CONSORTIUM TRAINING EVENTS

A training provider, educational institution, or an industry association may apply for a consortium-training grant that will allow them to serve multiple businesses in the same industry sector with the same training needs. The proposal for the common training must serve employees of at least two (2) different businesses in the same industry sector; Include a maximum of 4 courses for a collective group of business seeking the same training

APPLICATION PROCESS

1. Complete and submit the EWT Employer Grant Application for review no later than 30 days prior to the start date of the training. The Grant Application must include an estimate of the total training cost.
 - Program Manager will review the application for completeness and to ensure that the training meets the objectives and outcomes of the program (avert layoffs, retain trained employees, increase competitiveness of business and trained employees achieve certifications, increased wages, create new jobs, develop transferable skills, increase profitability, etc.)
 - Applications are reviewed and approved on a first-come, first-served basis until funding has been exhausted.
2. Upon pre-approval of the EWT Employer Grant Application, the agreement between CareerSource Okaloosa Walton and the business will be prepared and sent electronically for signature.
3. In addition to the EWT Employer Grant Application, employer will submit an application for each employee participating in the training at least a week before the start of the training with support documentation (Copy of Social Security Card (SSC), Government ID, DD214 if applicable). Copy of I-9 may be submitted if SSC is not available.

INCUMBENT WORKER ELIGIBILITY

For purposes of the EWT Program, an incumbent worker must:

- Be a paid employee of the applicant business (W-2 employee);
- Have an established employment history with the employer for six months or more prior to the date of the application (**Note:** *In the event that the incumbent worker training is being provided to a cohort of employees, not every employee in the cohort need to have an established employment history with the employer for **6 months or more** as long as a majority of the employees being trained do meet the employment history requirement*);
- Be at least 18 years of age;
- Meet Selective Service registration requirements (**Note:** *Males born on or after January 1, 1960, are required to register with Selective Service within 30 days of their 18th birthday*);
- Be a citizen of the United States or a non-citizen whose status permits employment in the United States;
- Be working at a physical location in Okaloosa or Walton county; and
- Be registered at the Employ Florida website (<https://www.employflorida.com>)
- A copy of I-9 for attendees **only** if other enrollment documentation is not available.

TRAINING SERVICES

One of the great features of the Employed Worker Training (EWT) program is that it provides businesses with the flexibility to choose both the training title and training provider that best meets their individual needs. For training purposes, employers can choose a public or private educational institution; a private training vendor; private instructor; a company employee, or a combination of training providers.

ALLOWABLE TRAINING

For purposes of the EWT program, allowable training includes:

- The introduction of new technologies
- The introduction to a new product or service procedures that may lead to increase competitiveness and improve the efficiency of the business operations
- Upgrading to new jobs that require additional skills
- Professional development
- Occupational skills designed to meet the special requirements of a business or industry
- Other appropriate purposes identified by the employer and approved by CSOW Executive Director

ALLOWABLE TRAINING COSTS

Allowable costs may include only costs directly related to training. Examples of allowable costs include, but are not limited to the following:

- Tuition/ Training/Course Cost
- Instructor's / trainer's training-related wages (capped at \$35 p/hour for company employees delivering the training and \$200 for instructor hour for vendor training)
- Curriculum development
- Textbooks, instructional equipment, manuals, materials and supplies
- Examination for certification (If a separate cost)
- Other necessary and reasonable costs directly related to training

UNALLOWABLE TRAINING COSTS

Some examples of unallowable training costs include:

- Employee/trainee wages (**Note:** May be used as *in-kind* employer payments toward total cost of training ONLY if paid while attending the training)
- Employee/trainee fringe benefits
- Compensation or consultant fees not directly related to the provision of training
- Costs incurred prior to the approval date of the application
- Capital improvements
- Travel, food, lodging
- Membership fees and/or dues
- Conferences and training equipment purchase

FOLLOW-UP SERVICES

The Employed Worker Training (EWT) program, funded by the Workforce Innovation and Opportunity Act (WIOA), requires that the Program Manager or Career Advisor follow up with the employer and/or employees for one year following training. The information received from the employer is to document the quarterly

employment status of the trainees and other outcomes (i.e., promotions, increased wages, certifications, licenses, etc.) associated with the trainee(s) receiving training under the EWT program.

PAYMENT AND INVOICE INSTRUCTIONS

Businesses will provide a minimum of 50% of the total training costs. CareerSource Okaloosa Walton will reimburse up to 50% of the total training cost not to exceed 100% of allowable cost. Reimbursement normally takes 7 - 10 days to complete from the date of submission.

In order to invoice CareerSource Okaloosa Walton, the Employer/Training Vendor must provide as a minimum the following information:

- Completed CSOW Reimbursement Request Form for the entire training amount including:
 - A breakout of the costs as indicated in the EWT Application
 - All costs itemized
 - Proof of payments, such as copy of check stub or credit card statement
 - Copy of pay stubs or timesheet if wages paid during the training as in-kind contribution.
- Documentation from the Employer or Training Vendor to support all costs invoiced:
 - The type of training provided, length of the training, (i.e. agenda and sign-in sheets)
 - Certificate of completion for each attendee, and
 - The invoice from the training provider for the entire training amount with all costs itemized, with proof of payment, such as copy of check stub or credit card statement.
 - If Training is provided by in-house Subject Matter Expert (SME) the following is required:
 - Copy of SME certification in training provided;
 - SME timesheet training hours; and
 - SME detailed hourly cost to include back-up documentation such as payroll reports.
- A copy of IRS Form W-9 for the Employer or Training Vendor receiving the reimbursement from CSOW.
- A copy of the syllabus used for the training if training was conducted by an employee.
- For additional questions concerning invoicing, please contact Art Lee-Drewes, Finance Director, at (850) 651-2315 extension 205, Alee-Drewes@careersourceow.com.

Sample Reimbursement Request Form



**CareerSource Okaloosa Walton
Employed Worker Training Reimbursement Request Form**

Employer Name: _____
 Address: _____

 Telephone: _____ Contact name: _____
 Email: _____
 Type of Training: _____
 Training Provider: _____
 Dates of Training: _____

	Employer Portion of Training	CSOW Portion of Training (As outlined in agreement)
Tuition/ Training/Course Cost	\$ _____	\$ _____
Instructor's / trainer's training-related wages	\$ _____	\$ _____
Curriculum development	\$ _____	\$ _____
Textbooks, instructional equipment, manuals, materials and supplies	\$ _____	\$ _____
Other training-related expenses	\$ _____	\$ _____
Total:	\$ _____	\$ _____

I certify that this information provided is accurate and documented in our business records.
 (Documentation attached)

Employer signature: _____ Date: _____
 Printed Name: _____ Title: _____

Documentation required:

- Invoice from training provider for entire training amount with all cost itemized
- Copy of check stub and/or credit card payment receipt to verify payment by employer
- Certifications of completion for each training
- Documentation all of Employer Match/In-Kind cost as outlined in agreement

Invoicing contact – Art Lee-Drewes, Finance Director at (850) 651-1315

 CareerSource Okaloosa Walton

 Date