

# Scope of Work Occupational Skills Training

## NEMO Workforce Investment Board

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The Occupational Skill Training program is conducted in a classroom setting designed to enable the participant learn a specific vocational skill. It must first be determined and documented that there is a need for Training Services. Training services may be provided after required “Core” and “Intensive” services have been provided and the need has been substantiated. The sole provision of an Initial Assessment and an Employment Plan services do not justify the need for Training services.

The expected outcome and/or mission of the Occupational Skill Training Program is to provide the participant with specific skills that will enable them to increase their earning potential to a wage that will provide for, at a minimum, a self sufficient wage and allow them to retain unsubsidized employment. “Green Jobs” and occupations with high growth and high wages should be the focus.

The Occupational Skill Training (OST) Program will be operated in accordance with the NEMO Workforce Investment Board’s policies and guidance.

### **I. Program Standards**

- A. Referrals to the Occupational Skill Training service shall be based on the Skills Team’s assessment of the participant’s needs as documented on their Initial Interview, Assessment and Individual Employment Plan (IEP).
- B. WIA Adults are determined to be eligible in accordance with the priority system found in the Northeast Region Local Plan.
- C. Occupation specific training must be provided by a public or private vendor on the eligible provider list, with demonstrated training capability and paid for through an Individual Training Accounts (ITA) when funded through WIA.
- D. Training funded through partner agencies does not have to be paid through an ITA.
- E. Participants receiving partner funded training and subsequent credential will be included in the performance measures.
- F. To qualify as Occupational Skills Training (OST), a course must be at least 40 hours in duration and be approved by DESE. (listed on DESE approved providers list)
- G. WIA Adult and Dislocated Worker funds can be used to pay for tuition, books, fees and supplies pertaining to individual referrals to the Dept. of Elementary and Secondary Education. Expenses not included on the DESE web site cannot be paid for.

- H. The Occupational Skills Training service will be of sufficient duration to allow successful completion of the course. Training selections will be those which will be completed within a 104 week (two year) period utilizing WIA funds. Any classroom training service that extends beyond the 104 week limitation must have written approval from the Workforce Investment Board. Decisions to extend the training length will be based on documented participant need as demonstrated in the IEP. The maximum 104 week training period is applicable to Title I WIA funds and is not a limitation of partner training programs.
- I. The Toolbox Case Tracking System shall reflect services provided to the participant and also include training activities of participants who receive training through the partner programs such as Vocational Rehabilitation and Trade Act, providing the results of the assessment and the Individual Employment Plan are conducive of the training service activities.
- J. Activities shall be entered into the Toolbox Case Tracking System using “real time” data entry of the beginning of the activity.
- K. Participants enrolled in the Occupational Skill Training service component will be tested and interviewed to ascertain the individual's need for services and a maximum effort will be made to utilize other agencies and program services to achieve the participant’s goals.
- L. The Skills Team staff, with the approval of the Functional Leader, can issue training funds up to a prescribed amount not to exceed local funds of \$5000 per calendar year per participant. Occupations identified as “Green Jobs” will not exceed \$6000 per calendar year per participant. This voucher may be used only for the following related education costs as identified by the training provider and approved by DESE: tuition, books, required supplies and fees.
- M. MERIC and the Missouri State data will be the resources used to identify jobs considered as “Green Jobs”.

## **II. Coordination of Training Funds**

- A. Tuition reimbursement payments will be adjusted to account for the participant’s receipt of Pell Grants, Missouri Grant, other grants and scholarships and any other resources not mentioned.
- B. The Skills Team staff should determine the customers resources and;
  - 1. Calculate the total funding resources available, as well as, assess the full education and education related costs (Training and Support Services costs) for the customer to complete the chosen educational program. A list of these resources and needs should be documented in the customers hard copy file and should be updated as their situation changes.
  - 2. Staff should use the Training Resources form designated from the Workforce Investment Board.

3. A complete assessment of the individual's financial needs should occur and appropriate financial counseling should be provided to ensure the participant successfully completes training.
- C. Complete the Pell Grant documents or other form of financial assistance eligibility.
  - D. Coordinate training costs/funds to avoid duplication of costs payments.
  - E. Other grants and awards must be applied toward educational expenses and expenses associated with education before WIA funds can be utilized.
  - F. The mix of training and support service funds from WIA and other funds, including Pell Grants, must be documented and maintained in the customer file.
  - G. Pell Grant funds must be used toward the cost of tuition first. Remaining Pell Grant funds may be applied toward expenses associated with education, such as support services if not used for educational expenses.
  - H. The WIA customer can be enrolled in a WIA funded activity while an application for Pell Grant funds is pending
  - I. If the Pell Grant is approved after an obligation for the ITA has been made, the balance of the Pell Grant should be applied to support services if the customer is receiving this service. Customers approved for a Pell Grant after obligation of an ITA has been made who are not receiving support services, will have the amount of the ITA reduced.
  - J. Customers are not required to apply for student loans or to incur debt as a condition of WIA participation.

## **II. Participant Services**

### **A. Enrollment**

1. Only individuals who have met eligibility criteria for Title I WIA Adult and Dislocated Worker Intensive and training level services, who have received Core and Intensive level services and who have been assessed as appropriate, may be enrolled into the Occupational Skill Training services. The need for training level services must be substantiated in Toolbox 2.0 and documentation maintained in the participant's file.
2. Training level services must be justified and shall be documented on the appropriate Toolbox tab.
3. When properly justified on the IEP as a participant need, the Occupational Skill Training Service may also be used in combination with other WIA activities such as OJT or Work Experience. Justification of the need must be documented and entered into Toolbox. When a combination of On-the-Job Training or Work Experience and Occupational Skills Training is necessary the maximum of \$5000 in WIA funds may be used.

4. Missouri's Toolbox Case Tracking System will be used to document the results of the comprehensive assessment, financial needs and resources, educational attainment, employment history, skills, abilities, qualifications, educational attainment, employment history, basic literacy and occupational skills levels, interests and aptitudes, family situation, emotional and physical health, including disabilities, attitudes towards work, motivation, and support service needs.
5. An assessment of the individuals financial situation and financial needs shall be assessed and their needs documented in the Assessment tab in Toolbox to ensure successful program completion and justify the need for services such as support services.
6. Labor Market information will be used to assist customers when selecting an occupation to ensure the anticipated wages are sufficient to assist the customer in reaching self sufficiency. This information shall be documented on the IEP.
7. The Skills Team will be responsible for maintaining and updating the IEP of all participants to reflect enrollment and to identify additional service or training needs, and to record program accomplishments. Participants shall receive copies of their IEP updates.
8. Enrollment into classroom training will occur for those occupations determined to be in demand in the Northeast Region or an occupation in demand in the area in which the participant is willing to relocate.
9. An orientation will be provided to each participant upon enrollment into the Occupational Skills Training (OST) service. This will include, but not be limited to, the following:
  - a. Description, purpose, conditions and standards for the Occupational Skill Training services
  - b. Length of services
  - c. Types of services and other training available
  - d. Intake and assessment phase to include:
    - Eligibility process
    - WIN Initial Assessment
    - Complaint and grievance procedures
    - Assessment instruments
    - IEP
  - e. Program characteristics to include:
    - Needs based payment (if applicable)
    - Support service requirement
    - Weekly timesheets/monthly progress reports
    - Attendance requirements
    - Minimum grade of 2.5 GPA
    - Counseling visits

- Follow-ups
  - f. Participant responsibilities
  - g. Counselor's name and telephone number
10. Classroom occupational services should be consistent with the participant's interests, abilities and aptitudes as indicated on the Toolbox Initial Interview, Assessment, IEP and service notes which will ultimately allows the participant to earn wages that provide for self sufficiency.
  11. Participants who possess a credential or degree which is determined to be current and will allow them to earn a self sufficient wage may not be provided training level services unless it is determined and documented that skills upgrading is necessary to allow them to obtain current employment resulting in a self sufficient wage.
  12. Participants attending classroom occupational training should maintain a 2.5 semester GPA. Failure to maintain a 2.5 semester GPA may result in loss of WIA Title I funding.

#### B. Instructors Orientation

1. The Skills Team will provide a standardized orientation to instructors providing classroom occupational training services to participants. The orientation shall include:
  - a. An explanation of the Occupational Skill Training Program
  - b. The instructors responsibilities relative to the Occupational Skill Training program to include:
    - A detailed description of the time and record keeping requirement
    - Weekly timesheets
    - Monthly progress reports
    - The requirements of the training planned for each participant
    - The name and phone number of the contracting agencies key contact person for information and assistance in resolving any participant/instructor problems
  - c. No signature will be required; however, a service note will be placed in the individual's record prior to the first date of training indicating the name of the educational representative who was given the instructor's orientation.

### III. Administrative and Management

#### A. Time and Attendance Records

1. Time and attendance records shall be maintained on a weekly basis for those eligible to receive Support Services payments.
2. The records shall be signed by both the participant and instructor to verify actual hours of classroom instruction and to provide for the accuracy in Support Service payments if applicable.

3. Participants will be responsible for submitting verification of their progress in training activities. This will be required at a minimum on a mid-semester and semester basis to evaluate their progress in training.
4. Failure to provide regular grades and/or an evaluation of the participant's progress in training will result in a hold on future WIA Adult and Dislocated Worker funding until the information is received. Updates on the student's progress in training must be received at a minimum every 89 days and must be noted in Toolbox Progress for continued funding.
5. Support Services may only be provided to individuals attending training that have met the criteria and requirements of this scope of work. Individuals attending training determined to be not appropriate will not be supported by Title I WIA Adult and Dislocated Worker support services.

#### B. Program Operational Provisions

1. All participant files shall contain at a minimum:
  - Toolbox WIA Registration Form
  - Supportive documentation of WIA eligibility (if applicable)
  - Signed Individual Employment Plan (IEP)
  - DESE 6 form (ITA)
  - Weekly Timesheets (if receiving support services or needs related)
  - Progress Report results posted in Toolbox
  - Service note providing the name of the educational instructor who received the Instructor's Orientation
  - Results of the Initial Interview posted in Toolbox
  - Results of the assessment posted in Toolbox assessment tabs. All tabs must be completed except CAGE assessment.
2. The following documentation must be available through Toolbox:
  - WIA Application
  - Service notes
  - Activities
  - Assessment—All assessment tabs in Toolbox must be completed
  - Comprehensive Assessment results shall be documented in Test results tab in Toolbox
  - Review of financial need shall be documented in Toolbox
  - Justification of Training level service documented in Toolbox
  - Termination data
  - Employment data