

	Policy No: P-210
	Effective Date: July 1, 2018
	New <input type="checkbox"/> Revised <input checked="" type="checkbox"/>
GENERAL CUSTOMIZED TRAINING AND RELATED ACTIVITIES	

PURPOSE

To outline the parameters for which SOWIB may expend non-federal funds for Customized Training and related activities.

DEFINITIONS

Customized Training: Training that is designed to meet the needs of the business community and/or a group of employers, in which trainees benefit by learning new skills and obtaining and/or retaining employment after successful training completion.

POLICY

Allowable Activities

Non-federal funds earmarked for Customized Training and related activities may be used for any of the following:

- Training that is designed to increase the employability and soft skills of participants
- Training that allows for career exploration in demand occupations, with specific emphasis on those in SOWIB's identified target sectors
- Training that provides for the development of basic skills specific to the needs of an employer or group of employers

Training Costs

Training costs may be used to support activities performed by post-secondary institutions, as well as qualified organizations, instructors, or professionals from the community. Customized Training may also be conducted by an employer or a third-party training provider on behalf of an employer or group of employers.

Costs may be based upon negotiated flat rates or on itemized reimbursement basis. Costs may include the development of curriculum, instructors, course tuition, costs of wages during the time of the training for eligible trainees, and material and supply costs.

Purchases of capital equipment, production equipment, and facilities costs are not an allowable reimbursement expense.

Customized Training funds may not be used for training that can be paid from other readily available private, government, or grant sources.

Customized Training Additional Requirements

All activities and allowable costs must also meet the requirements of the grant or other agreements between SOWIB and the entity providing funding, as applicable.

Participants must be 16 years of age or older.

Administration

A written contract signed by the applicable parties is required for each SOWIB funded customized training activity.

Providers may be responsible for:

- Providing training that meets the identified needs of the community, sector, or employer(s)
- Writing or amending the customized training plan as needed upon request from SOWIB
- Recruitment of appropriate participants to fill training cohorts
- Invoice preparation with detailed backup
- Compliance with current funding requirements
- Clarifying any questions or concerns of the group of employers or community group
- Reporting on outcomes and successes of training as requested by SOWIB
- Providing support and regular check-ins with participants to identify barriers and provide assistance to ensure successful completion

Records Maintenance

The subrecipient, employer, and training provider shall maintain documentation to support the appropriateness and necessity of the activity for individual participants and to support all related expenditures.

Sub recipient, employer, and training provider records are subject to review upon request of SOWIB, and Higher Education Coordinating Commission of the State of Oregon. The sub recipient, employer, and training provider shall retain all records in accordance with SOWIB's Record Retention Policy.