

# **OPERATIONS MANUAL CHAPTER 4. PART 3: WIOA TITLE I TRAINING SERVICES**

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## I. INTRODUCTION

The San Diego Workforce Partnership (Workforce Partnership) Operations Manual provides detailed requirements, instructions, and guidelines for managing workforce development programs. In the policies mentioned herein, references to Staff applies to and includes any Workforce Partnership Staff, Subrecipient, Operator, Employer, Training Provider, utilizing San Diego Workforce Partnership (Workforce Partnership) WIOA: Title I training funds (29 CFR 38.4[zz]). This section is intended for staff to meet standards and comply with the requirements set forth by the State Employment Development Department (EDD), the U.S. Department of Labor (DOL) and all applicable laws and requirements.

The terms and conditions of the Workforce Partnership Operations Manual are subject to change, and may change, based upon (i) legislation, (ii) additions, modifications, or revisions to federal and/or state laws, regulations, requirements, procedures, or interpretive materials which may affect the workforce development system, (iii) DOL regulations and procedures, (iv) EDD regulations and procedures, and (v) the adoption by the Workforce Partnership's governing board of local direction and procedures. Workforce Partnership staff that oversee WIOA Title I programs shall agree to remain informed of the WIOA and its regulations and requirements.

### A. Sources for WIOA: Title I Program Requirements

Guidelines and requirements of the Workforce Partnership's WIOA Title I Programs are based on the DOL and EDD official source documents listed below:

a) *DOL Final Rules and Resources*

[WIOA Laws, Regulations, & Guidance | U.S. Department of Labor \(dol.gov\)](#)

b) *DOL Notices of Proposed Rulemaking (NPRMS)*

<https://www.federalregister.gov/documents/2015/04/16/2015-05530/workforce-innovation-and-opportunity-act-notice-of-proposed-rulemaking>

c) *DOL Training and Employment Guidance Letters (TEGLS)*

[https://wdr.doleta.gov/directives/all\\_advisories.cfm](https://wdr.doleta.gov/directives/all_advisories.cfm)

d) *The Code of Federal Regulations (CFR)*

<https://www.ecfr.gov/> - The Code of Federal Regulations (CFR) is the official legal print publication containing the codification of the general and permanent rules published in the Federal Register by the departments and agencies of the Federal Government.

e) *EDD Directives*

[http://www.edd.ca.gov/jobs\\_and\\_training/Active\\_Directives.htm](http://www.edd.ca.gov/jobs_and_training/Active_Directives.htm)

[http://www.edd.ca.gov/jobs\\_and\\_training/View\\_Draft\\_Directives\\_Closed\\_for\\_Comment.htm](http://www.edd.ca.gov/jobs_and_training/View_Draft_Directives_Closed_for_Comment.htm)

[http://www.edd.ca.gov/jobs\\_and\\_training/View\\_and\\_Comment\\_Open\\_Directives.htm](http://www.edd.ca.gov/jobs_and_training/View_and_Comment_Open_Directives.htm)

[https://www.edd.ca.gov/Jobs\\_and\\_Training/Information\\_Notices.htm](https://www.edd.ca.gov/Jobs_and_Training/Information_Notices.htm)

## II. TRAINING COMPONENTS

### A. WIOA Title I Participant Eligibility for Training Services

*The following job seekers are eligible for WIOA: Title I funded training services. Specific eligibility requirements within these categories are defined in Chapter 7. Part 1: WIOA Title I Program Eligibility.*

- **Adult** – meets required income level, 18 years or older, registered for selective service (for males 18 or older), meets priority of service and demonstrates need for services beyond Basic Career Services to achieve employment.
- **Dislocated Worker** – Has been terminated or laid off, or has received notice of termination or layoff, 18 years or older, registered for selective service (for males 18 or older), and demonstrates need for services beyond Basic Career Services to achieve employment.

- **Incumbent Worker** - Is currently employed, meets the Fair Labor Standards Act requirements for an employer-employee relationship, and has an established employment history with the employer for 6 months or more. An incumbent worker does not have to meet the eligibility requirements for adults and dislocated workers under WIOA unless they are also enrolled in the WIOA: Title I programs, adult, or dislocated worker program.

### **B. Monitoring, Accessibility and Condition of Records**

The Workforce Partnership and/or a third-party monitor contracted through the Workforce Partnership, EDD, and in some cases DOL will conduct monitoring of training service within the participant's records during oversight visits. Refer to **Chapter 8: Oversight and Monitoring** and **ATTACHMENT – ADULT AND DISLOCATED WORKER PARTICIPANT FILE MONITORING CHECKLIST**.

Participant training agreements must be available and easily accessible to federal, state and local monitors and other authorized persons, including documentation of required corrective actions.

All required forms must be filled in completely and properly signed. White out, correction tape, or correction fluid is not permitted on any of the forms and will not be accepted as valid by the Workforce Partnership or EDD monitors if found on a document.

### **C. Record Retention**

WIOA record-retention requirements dictate that participant hard copy files must be maintained and made available, if requested, by the Workforce Partnership Operations team or state /federal funding sources for a period of four (4) years from the closeout of the program year. If any open findings, grievances or other claims related to the records exist at the end of the four-year (4) period, the records must be maintained indefinitely, until all findings or other issues are fully resolved. All participant records must be accounted for. Missing records may result in disallowed costs.

## **III. TRAINING SERVICES STRATEGY**

Staff have the discretion to determine what specific program services a participant receives, based on each participant's Objective Assessment (OA) and Individual Employment Plan (IEP). Staff are not required to provide every program service to each participant. However, training services are available through their program or referral to another entity that provides that service.

### **1. Program Tracks to Determine Training Service**

The Workforce Partnership has developed WIOA Program Tracks, refer to **Chapter 4, Part 1, ATTACHMENT – PROGRAM TRACKS (ADULT AND DW)** that each participant must enroll into as part of their program participation. All tracks include required training services and outcomes based on the results of the Program Match Finder Assessment on the needs and interests of the participant. Participants may switch tracks at any time based on updates to their Individual Employment Plan (IEP).

Tracks are as follows:

- Track A: Employment Only
- Track B: Employment & Experience
- Track C: Employment & Training
- Track D: Employment & Education

## 2. Braiding of Funds

Braiding of funds is the process of using different funding streams to support diverse needs for the same participant while maintaining documentation to support the charging and allocations of cost to the separate funds. Braiding of funds will provide more comprehensive services to participants and maximize partner resources available to assist job seekers. Braiding of funds must meet the following criteria:

- The cost of each funding stream is tracked, documented, and allocated based on the proportional benefit.
- The cost benefits two or more programs in proportions that can be determined without undue effort or cost.
- The job seeker meets the eligibility requirements for each program from which they are receiving funds.

**Example: A participant is enrolled in a WIOA Title I Adult/DW program and a WIOA Title II adult education program. The WIOA Title I resources can provide career guidance, occupational training, and job placement, while the WIOA Title II resources can provide adult education.**

### A. Outreach & Recruitment

Outreach and recruitment for training programs includes, but is not limited to, identifying potentially eligible participants that are on current caseloads that may need training services in order to become gainfully employed and working closely with other governmental and community organizations to identify and recruit job seekers who can benefit from training services.

### B. Intake, Eligibility Determination & Registration

The Intake and Eligibility Specialist is responsible for determining WIOA Title I Eligibility of all job seeker applicants recruited into the program, determining the job seekers suitability for training services, and collecting and verifying all necessary eligibility source documents. WIOA Title I Eligibility requires all job seekers to meet certain eligibility criteria and be determined eligible prior to enrollment and receipt of WIOA funded training services. Refer to the **Chapter 7. Part 1: WIOA Title I Program Eligibility**.

#### 1. Re-Enrollment

Approval for re-enrollment will be on a case-by case basis for individuals who are in follow-up or within 6 months from completing follow-up services.

### C. Training Policies

#### 1. Consecutive Training Approval

A currently enrolled or re-enrolled participant may receive another training if the prior training was successfully completed. The consecutive training must ensure career progression and if it's linked to the vocational training provided by the first training received and/or if they can demonstrate that the original training received is no longer in-demand. In some instances, a consecutive training may be approved by the Manager of Training Services if it will ensure career progression. These are not meant to be life-time caps.

## 2. Unsuccessful Training Completions

A participant that unsuccessfully completes a training program is not eligible for another training program unless unforeseen circumstances were proven, and commitment to complete the training program is demonstrated. A written request must be sent to the Manager of Training Services for approval. Appropriate documentation and approval should be kept in the participant case file and noted using an attached CalJOBS case note.

## 3. Training Extensions

A participant must complete their training program within the agreed upon start and end date. However, a request for an extension must be approved by both the Career Navigator and the Training Provider on a case-by-case basis for up to 6 months from the projected end date. The participant is responsible for any fees incurred due to the extension. Supportive service funds may be used to help cover the cost of the fees if funding is within the caps. Appropriate documentation and approval should be kept in the participant case file and noted using an attached CalJOBS case note under the corresponding activity code.

## 4. Repetition of Courses

If a participant must repeat/retake an exam or course in order to successfully complete the program, additional fees the Career center staff must have prior written approval from the Career Center Manager if the exam or course is paid for using WIOA funding. Appropriate documentation and approval should be kept in the participant case file and noted using an attached CalJOBS case note under the corresponding activity code.

# IV. WIOA TITLE I TRAINING SERVICES

Training Services are available for WIOA Title I Adult and Dislocated Worker programs. The training services provide tools and resources to help participants meet the skill and experience needs of the region's growing businesses. From technical skills, soft skills, work experience, traditional classroom instruction and employer-anchored training services help close the skills gap between participant and businesses.

Under WIOA, training services may be provided if AJCC staff determine after an interview evaluation or assessment and career planning, that the participant is eligible. Refer to **Chapter 7, Part 1: WIOA Title I Adult Program Eligibility** for more information regarding adult and dislocated worker eligibility.

## A. Eligible Training Providers List (ETPL)

Participants may access training services such as Individual Training Accounts (ITAs) and Apprenticeship Training Accounts (ATAs) through training providers who have met eligibility requirements set by the state in order to be listed on the state-managed Eligible Training Provider List (ETPL). As the local area, San Diego has additional eligibility requirements to ensure the trainings provided are in occupations with regional growth projections and locally sustainable wages, as well as meeting the needs of the region's employers. Participants may access registered apprenticeship programs approved by the Division of Apprenticeship Standards (DAS) that are listed on the State-managed ETPL.

Please note that other local areas may have ETPL policies which vary based on their needs. A training provider interested in serving multiple local areas must review and comply with the

ETPL policies of each area where they wish to operate. The Workforce Partnership does not review or approve providers to operate in areas outside of San Diego. Refer to **ATTACHMENT – ETPL POLICY AND PROCEDURES** for more information.

**1. Individual Training Accounts (ITAs)**

ITAs are designed to provide traditional classroom training services to participants who need training that prepares them for employment in-demand and/or higher in-demand occupations in the San Diego region. Refer to **ATTACHMENT – INDIVIDUAL TRAINING ACCOUNT AND APPRENTICESHIP TRAINING ACCOUNT POLICIES AND PROCEDURES** for more information.

**2. Apprenticeship Training Accounts (ATAs)**

ATA is a formalized, structured training program that combines on-the-job learning with related practical and technical classroom instruction in a highly skilled occupation. Funding may be used to reimburse apprenticeship programs for the classroom training. Although apprenticeship programs involve on-the-job training, ATAs may not be used to subsidized job seeker wages. The length of the apprenticeship training will vary by occupation. The apprentice is hired as an employee and earns wages once accepted into the program. Refer to **ATTACHMENT – INDIVIDUAL TRAINING ACCOUNT AND APPRENTICESHIP TRAINING ACCOUNT POLICIES AND PROCEDURES** for more information.

**B. On-the-Job Training (OJT)**

OJT is a strategic employment service that supports the business community in their hiring process by adding staff capacity, productivity and training at reduced costs to the Employer and is an excellent vehicle for participants to build their skills and re-establish their employment status. OJT benefits Employers by reducing the cost of training new employees, the Employer designs the on-site training, training is aligned with the skills required for the job and is a long-term investment in the company. OJT benefits the participant by providing an opportunity to “earn as they learn” in a hands-on environment, acquire job and career advancement skills, and provides an opportunity for long-term employment. Refer TO **ATTACHMENT – ON-THE-JOB TRAINING POLICY (OJT) AND PROCEDURES** for more information.

**C. Customized Training (CT)**

CTs are designed to meet the specific skill needs of an employer or a group of employers. This type of training typically includes a commitment from the employer to share costs with the training provider and to hire some or all of the successful completers of the training program. CTs are partnerships between employers and the Workforce Partnership which perform critical tasks like managing and convening the partnership, participant recruitment, performing assessment and intake, and providing linkages to supportive services. Refer to **ATTACHMENT - CUSTOMIZED TRAINING (CT) & CONTRACTED EDUCATION TRAINING (CET) POLICIES AND PROCEDURES** for more information.

**D. Contracted Education Training (CET)**

Adult, dislocated worker and incumbent worker training funds may be used to contract directly with institutions of higher education, certification programs or other eligible training providers, under certain conditions. The Workforce Partnership may award a contract to an institution of higher education or other eligible training provider if determined that it would facilitate the training of multiple individuals in high-demand occupations, and if such contract does not limit job seeker choice. Direct contracts with institutions of higher learning or eligible training providers allow to quickly design training to fit the needs of both participants and employers.

Refer to **ATTACHMENT - CUSTOMIZED TRAINING (CT) & CONTRACTED EDUCATION TRAINING (CET) POLICIES AND PROCEDURES** for more information.

### **E. Incumbent Worker Training (IWT)**

Incumbent worker training (IWT) under WIOA provides both workers and employers with the opportunity to build and maintain a quality workforce and increase both participants' and companies' competitiveness. It is a type of work-based training and upskilling designed to ensure that employees of a company can acquire the skills necessary to retain employment and advance within the company, or to acquire the skills necessary to avert a layoff. Incumbent worker training is responsive to the unique requirements of an employer or a group of employers in partnership with other entities for the purposes of delivering training to:

- Help avert potential layoffs of employees, or
- Increase the skill levels of employees so they can be promoted within the company and create backfill opportunities for the employers.

Refer to **ATTACHMENT – INCUMBENT WORKER TRAINING (IWT) POLICY AND PROCEDURES** for more information.

### **F. Transitional Jobs (TJ)**

Transitional jobs are a type of work-experience local workforce development boards can offer as an individualized career service under WIOA. Transitional jobs are time-limited, wage-paid work experiences that are subsidized up to 100 percent. These jobs can be in the public, private, or nonprofit sectors and are only available for individuals with significant barriers to employment who are chronically unemployed or who have an inconsistent work history, as determined by the local board. Transitional jobs provide individuals with work experience and an opportunity to develop important workplace skills within the context of an employee-employer relationship, in which the program provider generally acts as the employer, and with an opportunity to develop important workplace skills. Refer to **ATTACHMENT – TRANSITIONAL JOBS POLICY AND PROCEDURES** for more information.

## **V. TRAINING OUTCOMES**

WIOA requires a comprehensive accountability system to determine the effectiveness of training services provided through the Career Center network. All performance data is entered into CalJOBS in order to capture the required performance outcomes.

### **A. Definitions**

Definitions needed to understand WIOA performance and the mechanisms for calculation of performance, including definitions, are found in [WSD19-03](#), "Performance Guidance." The training performance indicators include:

- Credential Attainment
- Measurable Skill Gains
- Placement in a Training Related Occupation

### **B. Credential Attainment**

Credential attainment is the number of participants enrolled in an education or training program (excluding On-the-Job Training [OJT] or customized training) who attain a recognized postsecondary credential, during participation or within one year of program exit. Characteristics of a quality industry-recognized credential:

- Accessible — Affordable and readily available at places and times convenient for working adults;



- Transparent — Clearly articulated costs and prerequisites; accurate picture of what skills, knowledge and abilities are benchmarked by a given credential, and the value it carries in the labor market;
- Stackable — One of multiple manageable chunks that add up to a more substantial credential and do not require starting over at each new step;
- Portable — Transferable between firms, regions and educational institutions;
- Meaningful — Has value in the labor market; and
- Connected — Links to a job or an educational pathway

### 1. Post-Secondary Credential

An industry-recognized certificate or certification, a certificate of completion of an apprenticeship, a license recognized by the State or Federal government, or an associate or bachelor's degree. A recognized postsecondary credential is based on the attainment of measurable technical or industry/occupational skills necessary to obtain employment or advance within an industry/occupation. These technical or industry/occupational skills are based on standards developed or endorsed by employers or industry associations.

The following are types of recognized postsecondary credentials:

- Associate degree.
- Bachelor's degree.
- Occupational licensure (e.g., Certified Nursing Assistant license).
- Occupational certificate, including Registered Apprenticeship and Career and Technical Education educational certificates.
- Occupational certification (e.g., Automotive Service Excellence certification).
- Other recognized certificates of industry/occupational skills completion sufficient to qualify for entry-level or advancement in employment.

Examples that **DO** meet the postsecondary credential definition include the following:

- An automotive service excellence (ASE) certification.
- A crane operator certificate.
- A certified nurse assistant (CAN) license.

#### a) Credential Verification

Career center staff must access EDD's Labor Market Information Occupational Guides before determining if a credential and/or occupational certificate qualifies under the Credential Attainment indicator. Using LMID's Occupation Data tool at [labormarketinfo.edd.ca.gov](http://labormarketinfo.edd.ca.gov), an individual can research an industry and identify if a credential is required for employment. If a credential is required for employment, then that credential will often qualify for the credential attainment indicator.

Examples that **DO** meet the postsecondary credential definition include the following:

- An automotive service excellence (ASE) certification.
- A crane operator certification.
- A certified nursing assistant (CNA) license.

### Process for Credential Verification

- Identify occupation of interest (ex: Emergency Medical Technician [EMT]).
- Using the Occupation Data tool provided on [labormarketinfo.edd.ca.gov](http://labormarketinfo.edd.ca.gov), research this occupation's profile.

- Determine if this occupation requires a license, identify the title of the license, and the necessary skills to obtain the license.
- Required license title (e.g., Emergency Medical Technician License)
- Review skills listed to obtain license (ex: Managing respiratory, trauma, and cardiac emergencies, and patient assessment. Time in an emergency room or ambulance dealing with bleeding, fractures, airway obstruction, cardiac arrest, and emergency childbirth. Use and maintain common emergency equipment, such as backboards, suction devices, splints, oxygen delivery systems, and stretchers.)

### Documentation of Credential Attainment

A copy of the degree, certificate, or credential must be attached to the appropriate activity code in CalJOBS.

**Note: When documenting the attainment of a degree, certificate, or credential attainment,** use the actual date of attainment and not the date the documentation was received. If there is a delay in receiving the documentation, note the reason for the delay and the approximate expected date you plan to receive the documentation in a CalJOBS case note. When the documentation is received, attach it to the participant's activity code and update the case note with the date it was received.

#### b) Credential Attainment limitation

Certificates awarded by Local Workforce Development Boards and work readiness certificates are not considered postsecondary credentials because neither type of certificate is recognized industry-wide, nor documents the measurable technical or industry/occupational skills necessary to gain employment or advancement within an occupation. Certificates/credentials that provide general skills related to safety, hygiene, etc., even if such general skills are broadly required to qualify for entry-level employment or advancement in employment, are not considered postsecondary certificates/credentials.

The successful completion of a training program does not mean a credential was attained. The participant must have completed the training, fulfilled all of the requirements to receive the credential (e.g., passage of credential exam), and provide credential verification.

The following are examples of credentials/certificates that are NOT recognized postsecondary credentials:

- Occupational Safety and Health Administration 10-hour course on job-related common safety and health hazards (OSHA 10).
- Microsoft Office, Customer Service, and/or General Office.
- National Career Readiness Certification.
- National Retail Federation Credentials.
- ServSafe Food Handler's Certification.
- Cardiopulmonary Resuscitation (CPR) Certification.

#### C. Measurable Skills Gain (MSG)

MSGs track a participant's interim progress. Therefore, it is intended to capture important education or training progressions based upon "real time." It is NOT an exit-based performance indicator. This enables career center staff to track and report progress and performance for participants while they are in the program.

For the MSG performance indicator, a new period of participation is counted each time a participant enrolls into a training/education program. A participant is included in the performance indicator even if they are enrolled late in the program year. Career center staff must not delay enrollment or services to participants. If the period of participation spans over multiple program years, a new MSG must be calculated for each program year the participant is enrolled in an education or training program.

Career service staff are required to document MSGs during the program year (July 1 – June 30) that a participant is enrolled in education or training, regardless of if the participant exits in the same program year. An MSG can be added after exit, and if applicable, may be counted toward the previous program year. This requirement applies to each program year the participant is enrolled in an education or training program.

The five MSG measures require documentation contingent upon the type of training or education for which the participant is enrolled. Participants may fall into one or more of the measures. If a participant falls into more than one MSG measure, career center staff have the flexibility to choose which measure to report; however, the type of skill gain for participants must be based on the Participant's individual. Only the most recent MSG per program year will be factored into the performance measure. The five MSG measures, and their corresponding documentation are as follows:

#### 1. [MSG Measures & Documentation](#)

- 1) Educational Functioning Level: Achievement of at least one educational functioning level for a participant receiving instruction below the postsecondary level.
  - Compare educational functioning levels using a pre-test and post-test.
    - Pre-tests may be provided up to six months prior to program entry.
    - The date of post-test must be within the program year and must be before the program exit date.
  - Earned credits from an adult high school program that leads to a secondary school diploma or recognized equivalent.
    - Career center staff must collaborate with the local school districts to determine what constitutes as an "earned credit."
  - Exits program at the secondary level and enrolls in postsecondary education or training during the program year.
- 2) Secondary School Diploma: Achievement of a secondary school diploma, or its recognized equivalent.
- 3) Transcript/Report Card: Secondary or postsecondary transcript or report card that documents the participant is meeting the state's academic standards outlined by the [CDE](#).
  - Enrolled in secondary education: transcript or report card for one semester meeting the State's academic standards.
  - Enrolled in postsecondary education: transcript or report card showing a completion of a minimum of 12 hours per semester, or for part-time students a total of at least twelve credit hours over two completed consecutive semesters during the PY, and showing that the participant is meeting the State's academic standards
- 4) Progress Towards Established Milestones: A satisfactory or better score/evaluation on a training or progress report from the employer, or training documenting progress of meeting established benchmarks (e.g.: an employer/training provider documents a participant's completion of an apprenticeship milestone).

- a) Progress report showing the attainment of an established milestone from an employer or training provider within the reporting period.
  - b) Documentation may vary based up on the nature of services being provided, but the progress reports must document substantive skill development the participant has achieved.
- 5) Skills Progression (Passage of an Exam): Successful passage of a knowledge-based exam that is required to document progression of trade or training-related benchmarks.

#### **Documentation of MSG**

- Completed Measurable Skills Gain or Educational Functioning Level in CalJOBS; and
  - Required documentation of the MSG as indicated above for the type of education or training related goals/objectives on the IEP must be kept in the participant's case file in CalJOBS.
1. Measurable skills gain entered into CalJOBS and **ATTACHMENT - PARTICIPANT EVALUATION & PROGRESS REPORT FORM** or training provider issued report card.
  2. Measurable skills gain entered into CalJOBS and a copy of the passed exam

#### **2. MSG Limitations**

- Certificates/credentials used for Credential attainment may not be used to document an MSG.

#### **D. Placement in a Training Related Occupation**

In efforts to ensure participants are finding employment in trainings that the Workforce Partnership has invested on we will be tracking the percentage of participants who received an Individual Training Account (ITA) or Customized Education Training (CET) and are placed in a related occupation.

Training related employment is defined as the participant being placed in an occupation with the same standard occupational classification (SOC) code that was entered on the training activity code in CalJOBS.

#### **E. Performance Monitoring**

The Operations team and Management will monitor the performance throughout the program year using:

- 1) Data reporting from the program's system of record
- 2) Monitoring reports
- 3) Financial reports from the Workforce Partnership's finance team; and
- 4) Other program reporting requirements.

It is the responsibility of the Supervisors to ensure all staff involved in the service delivery are properly trained to provide career services.

## **VI. ATTACHMENTS**

**Training Provider CalJOBS User Guide**

**Eligible Training Providers List (ETPL) Policy and Procedures**

**In-Demand Occupations List**

**Individual Training Account (ITA) & Apprenticeship Training Account (ATA) Policies and Procedures**

**On-the-Job Training (OJT) Policy and Procedures**  
**Customized Training (CT) & Contracted Education Training (CET) Policies and Procedures**  
**Incumbent Worker Training (IWT) Policy and Procedures**  
**Transitional Jobs (TJ) Policy & Procedures**  
**Training Agreement**  
**Approval of Deliverables Invoice**  
**Participant Evaluation & Progress Report Form**