



Michael Altomare, Chair  
Steve Newvine, 1<sup>st</sup> Vice Chair  
Leslie McGowan, 2<sup>nd</sup> Vice Chair  
1205 West 18<sup>th</sup> Street, Merced, CA 95340  
Phone (209) 724-2000 · Fax (209) 725-3592  
[www.mercedwib.com](http://www.mercedwib.com)

## DEPARTMENT OF WORKFORCE INVESTMENT

### Policy For Incumbent Worker Training

**Policy:** In accordance with Section 134 (a)(3)(A)(iv)(I) of the Workforce Investment Act (WIA) of 1998, the implementing regulations and subsequent Department of Labor (DOL) guidance and waivers, the local Workforce Development Board determined Workforce Investment Areas are allowed to request approval for expenditure of a percentage of their local Adult and Dislocated Worker funds to provide training to incumbent workers. Training to incumbent workers may be provided using up to the maximum currently allowed percentage of formula funds in accordance with State guidance and/or DOL waivers to meet the needs of Merced County employers with incumbent workers in need of training. These individuals do not necessarily have to meet the eligibility criteria for dislocated workers contained in WIA Section 101 (9), nor do they have to meet the criteria for employed adults and dislocated workers contained in WIA Section 134 (d)(4)(A), except adults must meet the low income criteria.

Incumbent worker training is intended to assist Merced County employers as part of a layoff aversion strategy and with the development of a highly skilled workforce. The provision of such training should result in:

1. Enhance the skills of current employees to allow them to retain employment during periods of significant economical, technological or procedural changes in the employing organization, or
2. Upgrading the skills of current employees to assist in employee retention, or
3. Allow the business to avert potential layoffs by improving the skills of their current workforce.

All requests for incumbent worker training must be submitted by the employer requesting the training. The request must include justification for the training need based on the layoff aversion strategy and at least one of the above-listed criteria will be met through the provision of the training. Requests from employers will be submitted to the Director or designee in a standardized format developed for that purpose.

**Reference:**

EDD Directive WSD07-8

WIA Section 134(a)(3)(A)(iv)(I)

29 CFR 667.130

**Incumbent Worker Training Request** <http://mc-info/wiws/forms/ApprovedAlpha/WIF 09-03.pdf>

**Responsible Official:** Special Projects

**Review Date:** July 1, 2010

**Revised Date:** December 11, 2009

*“Merced County’s Workforce Investment system will keep pace with the new growth, the emerging economy, and the ever changing needs of the employers by creating a better educated, highly skilled workforce, that’s capable, and prepared, and thoroughly knowledgeable.”*