



Montana Department of LABOR & INDUSTRY

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2 **Division: Workforce Services Division**
3 **Category: Program Operations**
4 **Effective Date: 01/01/2018**
5 **Last Revised: N/A**
6 **Policy No.: 13-17**

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Incumbent Worker Training (IWT) Policy

8 **Background:** Incumbent Worker Training (IWT) is a grant program that allows the Montana Department of
9 Labor and Industry (DLI) to use state funds to help Montana employers purchase training for their current
10 workforce. The purpose is to help meet the training needs of incumbent workers in Montana's small
11 businesses, and to preserve existing jobs for Montana residents. The intent is to help the business remain
12 competitive in either their industry or the local economy.

13 **Scope:** This policy applies to workforce consultants, local office managers and supervisors, WSD fiscal agents,
14 and IWT program manager.

15 **Policy:**

16 **Definitions:**

- 17 • Accrual means a fiscal process to designate funding for IWT grants that have a signed financial
18 agreement in place and training is started by June 20th of the current state fiscal year, but where the
19 funds will not be expended until the next fiscal year.
 - 20 ○ A Accrual means an accrual where training ends after June 30th of the current state fiscal year.
 - 21 ○ B Accrual means an accrual where training ends before June 30th of the current state fiscal
22 year, but thereimbursement claim, or payment, could not be processed by June 30th of the
23 current state fiscal year.
- 24 • Award means an eligible grant with a funding offer extended to the applicant employer/business.
- 25 • Funding Opportunity means the Incumbent Worker Training program within the Montana Grants and
26 Loans system.

27 **Grant Applications:**

- 28 • Grant applications will be made available through the Montana Grants and Loans system at
29 <https://fundingmt.org>.
- 30 • The funding opportunity will be opened, and applications accepted at 8:00 am on the first business day
31 of July. ARM 24.22.331(2) Grant Application Process.
- 32 • The program will stop accepting applications June 10th at close of business.
- 33 • General revisions to the application form content will be made no more than once a year. Revisions to
34 resolve a system issue will be made as soon as needed.

35 **Training:**

- 36 • The Department will assess a request for customized training using the qualifications of the trainer as
37 required in ARM 24.22.331(8) Grant Application Process.

1 **Application Review:**

- 2 • The Department will return an application to the employer that is incomplete, contains errors, or needs
3 further clarification.
- 4 • The Department will track all trainings for each employer for the state fiscal year to assure employees
5 are not exceeding their allowable caps.
- 6 • The Department will review applications and issue determinations within 20 calendar days of the date
7 complete applications are submitted per ARM 24.22.331(9) Grant Application Process.
- 8 • Businesses approved for grant funding will have their grant awarded on a first-come, first-served basis
9 per ARM24.22.335(1) Evaluation of Grant Applications and Limitations.
- 10 • Eligible applications for which there is not sufficient funding will be placed on a wait list pending
11 available funding. The wait list will only be in effect between quarters within a state fiscal year, but not
12 between fiscal years.

13 **Grant Awards:**

- 14 • The Department will award Incumbent Worker Training grants to employers in accordance with the grant
15 award criteria set forth by [53-2-1218, MCA](#).
- 16 • A financial agreement will be issued with all awards. The Department will not sign the financial
17 agreement until it is signed by the business.

18 **Funding:**

- 19 • Funding released from awarded grants before June 20th of the current state fiscal year will be re-
20 awarded to another applicant if possible. Funding released after June 20th of the current state fiscal
21 year will be transferred to cover administrative costs, or to other programs.
- 22 • Awards that must be accrued will be set up following timelines and processes provided by Central
23 Services starting the first week of June, or as soon as timelines are provided.
- 24 • Reimbursement payments will be processed within 21 calendar days from the date a completed claim
25 is filed by the grantee.
- 26 • Incumbent Worker Training grant funds reimbursed to a business may be withheld by the Department of
27 Administration staff to offset other state debt by the grantee's business.

28 **References:**

- 29 • [53-2-1215 through 53-2-1220, Montana Codes Annotated \(MCA\)](#)
- 30 • [Administrative Rules of Montana \(ARM\)](#)