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To: WIOA and Other Subrecipients of the Orange County
Workforce Development Area

From: Carma Lacy
Director of Workforce Development

Subject: On-the-Job Training (OJT) Desk Procedures

PURPOSE

These procedures provide additional guidance to OCWDB On-the-Job Training Policy in order to provide OJTs to WIOA program participants.

Procedures

1. Employer Outreach

- OC Workforce Development Board's (OCWDB) Business Solutions department is responsible for engaging with and recruiting employers to serve as OJT placements.
- Service Providers may develop their own OJTs and/or assist OCWDB Business Solutions by recruiting/engaging with potential OJT employers and sending contact information to their OCWDB Program Manager.
- OJT employer outreach is used to promote the use of OJTs to both employers and job seekers.
- Outreach is to be tailored to the area's employment conditions with the main focus being on jobs in high-growth/in-demand sectors or occupations.
- Outreach includes, but is not limited to: face-to-face contacts, partnering with Registered Apprenticeship programs on employer visits, hard-copy mail outs (introductory letters, notes of appreciation, newsletters), involvement with organizations like the Chamber of Commerce and organizations representing industry sectors, partnerships with local economic development, press releases, networking with other agencies, and speaking to civic organizations.
- An employer may refer one of their employees (a reverse referral) or identify a potential participant first for an OJT; reverse referrals of potential OJT Trainees will be considered by OCWDB, but not automatically accepted into the OJT program. The potential Trainee must be WIOA eligible and making below the self-sufficiency level as indicated on the OJT Policy.



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2. Pre-Screening Employer

- OCWDB Business Solutions/Service Provider is responsible for determining employer eligibility.
- The potential employer completes the Employer Information form (OJT Policy Attachment II).
- Use the information provided by the employer on the Employer Information form to complete Attachment I Employer Pre-Screening Checklist.
- Review the Checklist to determine if the employer meets the requirements.
- Conduct a site visit
- Start an employer account in CalJOBS CRM, if employer is not already registered.
- OCWDB Business Solutions/Service Provider will work with employer to develop job descriptions and training plans for each position using OCWDB OJT Policy Attachment V.
- If the Service Provider initiated the employer relationship, the Service Provider is required to submit the Employer OJT packet (employer information form and job descriptions) to their OCWDB Program Manager for review and approval.

3. Participant Requirements and Selection

- If OCWDB Business Solutions develops the OJT, they will send job description(s) to the Service Providers.
- Services Providers are to send a list of candidates who meet the desired qualifications back to OCWDB Business Solutions within 5 business days.
- If no current WIOA participants meet the position requirements, OCWDB Business Solutions will send the position and employer information to the Anaheim, Santa Ana, and other Southern California WDBs for consideration; if Anaheim, Santa Ana, or other WDB accepts the position, the applicable WDB will assume management of the OJT.
- Service Providers are to ensure participants are WIOA eligible under the appropriate funding source (for both OCWDB Business Solutions and Service Provider OJTs), in need of training services, and understand OJT expectations and job description.
- Service Providers must complete an Individual Employment Plan (IEP)/Individual Service Plan (ISP) – assessment must document the participants' need for an OJT and the interest, aptitude, skills and ability to meet the specific employer OJT requirements.
- Co-enroll participant into Trade Adjustment Assistance (TAA), if applicable.
- OCWDB Business Solutions/Service Provider coordinates with employer to conduct interviews of the OJT candidate(s). If applicable, employers must agree to accept referrals from OCWDB and agree to interview other WIOA applicants for the OJT in addition to any employer referred participants.
- Employer selects candidate.

4. OJT Contract and Training Plan

- Once candidate is selected, OCWDB Business Solutions, in partnership with Service Provider, will prepare the contract and training plan for the OJT using

OCWDB OJT Policy Attachments III and IV and submit to employer within 10 business days.

- If Service Provider initiates OJT and candidate is selected, Service Provider will prepare the contract and training plan for the OJT using OCWDB OJT Policy Attachments III and IV and submit to employer within 10 business days.
- Maximum length of the training plan is 26 weeks (6 months).
- Use O*NET and the Specific Vocational Preparation (SVP) guidelines for determining training time for Trainee's identified occupation.
- Finalize and execute contract with employer and distribute to necessary parties.

5. Monitoring of Trainee

- Employer completes OJT Trainee Progress Report (OCWDB OJT Policy Attachment IX) monthly and submits to OCWDB Business Solutions or Service Provider.
- Service Provider conducts a monthly check-in with Trainee and adds case notes to CalJOBS.
- Service Provider will review Training Plan regularly and complete a Training Plan Modification (Information Notice 20-OCWDB-17 Attachment VI), if needed; coordinate any modifications with OCWDB Business Solutions.
- Service Provider will maintain documentation on selection of the OJT opportunity and development and maintenance of the Training Plan in CalJOBS using activity codes 301 (On-the-Job Training), 348 (On-the-Job Training - TAA), or 428 (Youth On-the-Job Training).

6. Monitoring of Employer

- OCWDB Business Solutions will check-in with employer each month (via email or phone) to ensure employer's satisfaction with Trainee(s); review Trainee Progress report with employer, if needed.
- OCWDB Business Solutions to conduct an annual on-site visit with each employer to ensure continued eligibility.
- OCWDB Business Solutions to maintain an employer case file that contains the pre-screening checklist, contract, and any other documentation related to the employer and the OJT and make updates in CalJOBS CRM.

7. Invoicing

- Employer will invoice County of Orange or Service Provider (whichever is applicable) at the end of the OJT using invoice template (OCWDB OJT Policy Attachment XIII)
- OCWDB Business Solutions or Service Provider is to review and approve invoice and timesheets submitted for the OJT Trainee.
- If more than one Trainee at employer worksite, employer is to submit an invoice for each Trainee.

8. Termination

- OCWDB has the right to terminate an OJT if the employer is not fulfilling the contractual obligations.
- Employers with terminated OJT contracts will be barred from entering into another OJT contract with OCWDB for at least one year, unless a waiver is obtained from the Orange County Director of Workforce Development.

- County of Orange/Service Provider will reimburse the employer only for the completed training hours.

ATTACHMENT

Attachment I: Employer Pre-Screening Checklist



OJT Employer Pre-Screening Checklist

All answers must be **Yes** in order for the employer to be eligible to participate in the OJT Program.

The Employer:	Yes	No
Is registered with the Internal Revenue Service (IRS)	<input type="checkbox"/>	<input type="checkbox"/>
Has been operating in Orange County for a minimum of 120 days; If less than 120 days and the business relocated from another area in the U.S and individual(s)/employees were not laid off at the previous location as a result of the relocation	<input type="checkbox"/>	<input type="checkbox"/>
Is financially solvent to meet the OJT contract obligations through the end of the training and for the participant's 12-month follow-up period	<input type="checkbox"/>	<input type="checkbox"/>
Has adequate payroll record keeping systems that track hours worked, gross pay, deductions and net pay.	<input type="checkbox"/>	<input type="checkbox"/>
Does not have any outstanding tax liability to the state of California for over six months	<input type="checkbox"/>	<input type="checkbox"/>
Does not have any outstanding civil, criminal or administrative fines or penalties owed to or pending in the state of California	<input type="checkbox"/>	<input type="checkbox"/>
Does not have a pattern of failing to provide OJT participants with continued employment	<input type="checkbox"/>	<input type="checkbox"/>
Verified that WIOA funds will not be used to relocate operations in whole or in part	<input type="checkbox"/>	<input type="checkbox"/>
Will not displace any currently employed worker, alter current workers' promotional opportunities, terminate any regular employee, or otherwise reduce the workforce in order to hire OJT Trainees	<input type="checkbox"/>	<input type="checkbox"/>
Will not use OJT Trainees to fill job openings as a result of a labor dispute	<input type="checkbox"/>	<input type="checkbox"/>
Does not have workers currently in a layoff status or has not laid off workers over the past 120 days from the same or any substantially equivalent job. <small>*The 120 day period may be waived if there are mitigating circumstances reviewed and approved by the Orange County Director of Workforce Development.</small>	<input type="checkbox"/>	<input type="checkbox"/>
Does not have any existing contracts for services or pre-established collective bargaining agreements that would be impaired by the OJT.	<input type="checkbox"/>	<input type="checkbox"/>
Verified that OJT funds will not be used to directly or indirectly to assist, promote, or deter union organizing	<input type="checkbox"/>	<input type="checkbox"/>
Will not allow OJT Trainees to work on the construction, maintenance or operation of any facility that is used for sectarian activities or as a place of worship.	<input type="checkbox"/>	<input type="checkbox"/>
Is providing reasonable working conditions and OJT Trainees are not permitted to train or work in buildings or surroundings under working conditions that are unsanitary, hazardous, or dangerous to the trainee's health or safety	<input type="checkbox"/>	<input type="checkbox"/>

Will provide Trainee wages paid at the same rate, including periodic increases, as other participants or employees who are similarly situated in comparable occupations with the same employer, and who have equivalent training, experience, and skills	<input type="checkbox"/>	<input type="checkbox"/>
Will provide Trainee benefits (e.g., workers' compensation, health insurance, unemployment insurance, retirement benefits) at the same level and to the same extent as other participants or employees working a similar length of time and doing the same type of work	<input type="checkbox"/>	<input type="checkbox"/>
Has an account with the California State Compensation Insurance Fund for Unemployment Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Carries Workers Compensation Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Is current in unemployment insurance and workers' compensation taxes, penalties, and/or interest or related payment plan	<input type="checkbox"/>	<input type="checkbox"/>
Will comply with the non-discrimination and equal opportunity provisions of WIOA law and regulations	<input type="checkbox"/>	<input type="checkbox"/>
The Training Plan will: <ul style="list-style-type: none"> • Outline all the specific skill requirements for the OJT occupation. • Address the participant's assessed skills gap(s) for the OJT occupation • Provide the participant with the skills necessary to meet all requirements of the job 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
The instructor(s) providing instruction and guidance to the participant is capable of delivering instruction consistent with the employer's needs: <ul style="list-style-type: none"> • The desire to teach • Knowledge of the subject(s) to be covered and skills required. • The ability to get along with others • The ability to teach the required knowledge, skills and occupational fundamentals to others 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
The participant will be provided instruction that ensures s/he will understand the underlying theories of the OJT position. <ul style="list-style-type: none"> • The instructor is well versed and understands the underlying theories of operation entailed in the OJT position. • The training outline provides for instruction in the underlying theories of operation reflected in the OJT position. 	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
The instructor(s) and other staff providing guidance and example to the OJT participant maintain good working habits that reflect the employer's standards	<input type="checkbox"/>	<input type="checkbox"/>
The instructor(s) or other staff responsible for delivering the training in the OJT training plan will have time (away from production and other duties) to carry out the teaching necessary for the participant to successfully complete the training	<input type="checkbox"/>	<input type="checkbox"/>