Oregon's Apprenticeship Initiative (Oregon AI)
New or Expanded Registered Apprenticeships in the Advanced Manufacturing and Information Technology Industries

Tuition Distribution Guidelines for Related Instruction
2017

The Oregon Employment Department, in partnership with the Apprenticeship and Training Division of the Bureau of Labor and Industries, was awarded a Federal American Apprenticeship Initiative Grant in October 2015. The overall goal of Oregon's Apprenticeship Initiative (Oregon AI) is to build a supportive network in Oregon for registered apprenticeships in the advanced manufacturing and Information Technology industries. This is part of a larger goal to strengthen apprenticeship within the statewide workforce system. **Funds will be distributed through these guidelines to support employment and skill gains by subsidizing the cost of related instruction for registered apprentices in new or expanded advanced manufacturing or information technology programs.**

Background regarding Apprenticeship

Apprenticeship is occupational skill training that combines on-the-job experience with classroom instruction. It provides unique benefits to both employers and apprentices. Apprenticeship programs are a partnership of employers, workers, the State of Oregon, and a variety of schools and community colleges. These programs train workers to meet industry standards for a given occupation. The following US Department of Labor tool, developed for employers, provides a broad overview of apprenticeship program development: Employer Apprenticeship Toolkit.

Registered apprenticeship programs are guided by approved Industry Standards, more commonly referred to as the "standards". These specify how a Registered Apprenticeship program operates. Standards are developed and agreed upon by an apprenticeship committee comprised of employers sponsoring programs (hiring apprentices) and they define minimum qualifications for applicants, what work process the apprentice will learn on the job, what instruction the apprentice will learn in the classroom, and how the apprentice will progress through the program (i.e. wage increases), among other things. In Oregon, the standards must be approved by the Oregon State Apprenticeship and Training Council (OSATC) and apprenticeship committees must operate the programs as approved in the standards.

For more information regarding how apprenticeship works in Oregon, please call the Apprenticeship and Training Division at (971) 673-0760 or email them at atdemail@boli.state.or.us.

Program Requirements

All funds for related instruction distributed must support registered apprentices in occupations in the advanced manufacturing or information technology industries. Only apprentices that are "newly registered" may be considered for grant funding. Applications for tuition assistance must be received within six months of the apprentices' registration date. Grant funds cannot be used to pay for related instruction that the apprentice has completed in the past.

There is no clear, specific, and widely-accepted definition of "advanced manufacturing" or "information technology". The grant will use the definitions below to determine if the application of the occupation qualifies under this grant.

ADVANCED MANAUFACTURING:
The following definition was developed by the President's Council of Advisors on Science and Technology.

> Advanced manufacturing is a family of activities that (a) depend on the use and coordination of information, automation, computation, software, sensing, and networking, and/or (b) make use of cutting edge materials and

emerging capabilities enabled by the physical and biological sciences, for example nanotechnology, chemistry, and biology. It involves both new ways to manufacture existing products, and the manufacture of new products emerging from new advanced technologies.

INFORMATION TECHNOLOGY:
The following definition was adapted from the Bureau of Labor Statistics.

> Information Technology (IT) is the use of computers to store, retrieve, transmit, and manipulate data or information, often in the context of a business or other enterprise. IT is considered to be a subset of the information supersector, which also includes communications technology. Industries in the subsector considered for this grant include establishments storing and providing access to information, searching and retrieving information, operating Web sites that use search engines to allow for searching information on the Internet, publishing and/or broadcasting content exclusively on the Internet, or that provide the infrastructure for hosting and/or data processing services.

New or expanded programs that fall in or near the definitions above will be considered. For more information regarding whether or not an apprenticeship program will be considered advanced manufacturing or information technology, please call Shaun Engstrom at 503-931-5379.

ELIGIBILITY:
The Program Lead/Program Administrator must be an Apprenticeship Committee with standards approved by the OSATC or a Registered Training Agent.

Apprentices served through the program must be either: a) youth that are at least 16 years of age and not currently enrolled in school within a local secondary educational agency (i.e., high school) or, b) at least 18 years of age. Priority of service must be provided for veterans and spouses of certain veterans.

Related instruction must be approved by the Oregon Department of Education or a nationally recognized industry association.

PROGRAMS SUPPORTED:
All funds for related instruction distributed through Oregon AI must support a new or expanded apprenticeship program.

A program is considered to be **new** if the Program Lead adopts or creates new OSATC-approved standards under which they have never before trained apprentices.

A program is considered **expanded** if it has OSATC-approved standards, has trained apprentices under the standards, and will achieve one or more of the following sustainable results during the period supported by Oregon AI funds for related instruction:

1. Participating employers in an Apprenticeship Committee increase by 20% or more with a minimum increase of 2 new participating employers over prior year. A participating employer is one who sponsors at least one apprentice.
2. Sponsored apprentices increase by 20% or more with a minimum increase of 3 sponsored apprentices over prior year.
3. Geographic area covered by an apprenticeship program expands from local to regional or from regional to statewide based on the employer location of sponsored apprentices.
4. Sponsored apprentices show significant increases in targeted or underrepresented populations (i.e. women and minority populations) over prior year.

Use of Funds

Funds may only be used for the cost of related instruction and academic fees. Subject to negotiation, funds will be distributed to the Program Lead or related instruction provider up to $10,000 per apprentice. The Oregon Employment Department will only reimburse program sponsors or related instruction providers for actual costs incurred to train the apprentice. Please note, funds may not be used to cover books or other supplies, except in cases where the apprentice's related instruction is front loaded and the apprentice will not be earning a wage while attending classes.

Instructions

The following list identifies all required instructions for Program Sponsors, Apprenticeship Committees, Administrators, or Registered Training Agents to request tuition funds to support employment and skill gains by subsidizing the cost of related instruction for registered apprentices in new or expanded advanced manufacturing or information technology programs.

STEP 1 – CONTACT THE OREGON EMPLOYMENT DEPARTMENT:
Contact the Oregon Employment Department (OED) and let them know you are interested in the Oregon Apprenticeship Initiative tuition subsidy program. You may contact Shaun Engstrom, Apprenticeship Program Liaison at the Oregon Employment Department. This conversation is to understand your program and guide you in taking next steps. The discussion can occur in person, over the telephone, or through email. Ms. Engstrom's contact information is: 503-931-5379 or shaun.c.engstrom@oregon.gov.

STEP 2 – CREATE A NEW PROGRAM:
For new programs, develop the Industry Standards of Apprenticeship to be approved by the Oregon State Apprenticeship and Training Council (OSATC). Work with an Apprenticeship Representative from the Bureau of Labor and Industries (BOLI) to identify and develop apprenticeship work processes, related instruction curriculum, and program administration approach. Standards must be approved before tuition payments can be made.

STEP 2 – DOCUMENT AN EXPANDED PROGRAM:
For expanded programs, provide the Industry Standards of Apprenticeship approved by the Oregon State Apprenticeship and Training Council (OSATC) and describe how the program will demonstrate expansion using the criteria stated above. Standards must be provided before funds are distributed.

STEP 3 – DISCUSS PROGAM PRIORITIES:
As part of the application process, each program may be asked how their program addresses one or all of the applicable Program Priorities.

- ☐ Apprenticeship Committee Development
- ☐ Connection to Career Pathways
- ☐ Improved Availability and Accessibility of New or Expanded Curriculum
- ☐ Apprenticeship Program Sustainability
- ☐ Improved Workforce System Partnership

STEP 4 – SUBMIT AN APPLICATION:
Once you have notified OED that you are interested in pursuing funding under the Oregon AI program and have an apprenticeship committee and standard in place, you will be asked to complete and submit the Application for Oregon AI Grant Funding, attached below. This form will act as your official request for funding. If the program is qualifying for funds through "expanding" their program, the applicant must submit a narrative describing how the sponsor's program meets one of the four criteria for expansion listed on page 2. The applicant may also be asked to describe how the application of the occupation falls within the definition of advanced manufacturing or information technology.

Assistance in completing this form can be provided by Ms. Engstrom. Once the application is received, an award or denial letter will be issued based on the information provided. Further information on funding levels and instructions on how tuition payments will issued will be included in the award letter. The award letter will ask for the apprentice's proof of enrollment (or equivalency) and ask the applicant to sign and attest to the award terms and conditions.

Application for Oregon AI Grant Funding

Business:

EMPLOYER NAME & ADDRESS: Click here to enter text.	PROGRAM CONTACT NAME, TITLE: Click here to enter text.	EMAIL: Click here to enter text.
APPRENTICESHIP COMMITTEE NAME AND #: Click here to enter text.	COUNTY: Click here to enter text.	PHONE: Click here to enter text.
APPRENTICESHIP STANDARD IS: ☐ New ☐ Expanded	# EMPLOYEES AT SITE: Click here to enter text.	NAICS: Click here to enter text.

Apprentice & Related Academic Instruction Information:

APPRENTICE NAME(S): Click here to enter text.	OCCUPATION: Click here to enter text.
INSTRUCTION PROVIDER(S) & ADDRESS: Click here to enter text.	ATTACH A LIST OF THE CLASSES THE APPRENTICE WILL BE REQUIRED TO COMPLETE: Click here to enter text.
INSTRUCTION START DATE: CLICK HERE TO ENTER TEXT.	ESTIMATED DATE ALL INSTRUCTION WILL BE COMPLETED: Click here to enter text.
TOTAL ESTIMATED COST OF APPRENTICE TUITION PER YEAR: $Click here to enter text. EMPLOYER/EMPLOYEE COST RESPONSIBILITY: _____% EMPLOYER _____% EMPLOYEE PLEASE DESCRIBE ANY OTHER APPLICABLE COST SHARING INFORMATION: Click here to enter text.	
FOLLOWING RECEIPT OF ALL COMPLETED GRANT FORMS THE OREGON EMPLOYMENT DEPARTMENT WILL ISSUE A CONFIRMATION OF GRANT AWARD TO THE EMPLOYER AND GRANT FUNDS WILL BE ISSUED TO THE INSTRUCTION PROVIDER(S) LISTED ABOVE. THE EMPLOYER WILL BE RESPONSIBLE FOR ENSURING THE APPRENTICE IS PROPERLY ENROLLED AND ATTENDING CLASSES APPROVED BY THE APPRENTICESHIP TRAINING COMMITTEE.	

AUTHORIZED COMPANY REPRESENTATIVE:

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EMPLOYER SIGNATURE   **TITLE**   **DATE**

SCAN AND EMAIL APPLICATION TO: shaun.c.engstrom@oregon.gov OR MAIL TO:
Attn: Shaun Engstrom
Oregon Employment Department, Workforce Operations
875 Union St NE
Salem, OR 97311

Program Priorities

APPRENTICESHIP COMMITTEES:

Each program must be led by an Apprenticeship Committee made up of employer and employee representatives of the industry. The committees operate apprenticeship programs. They decide how apprentices are selected, what apprentices learn in the program, how apprentices progress through the program, apprentice wage rates and the supervision ratios. Committees select apprentices, approve advancements, discipline apprentices and approve an apprentice's completion of the program based on program standards and committee policies. In doing this, committees must follow state and federal regulations and policies for operating a program. Other names for Apprenticeship committees are Joint Apprenticeship and Training Committees (JATC), Trades Apprenticeship and Training Committees (TATC), and Joint or Trade Apprenticeship Committees (JAC) or (TAC) and sometimes apprenticeship committees.

The quality of a committee is a strong factor in the success of the apprenticeship program. Quality can result from the size, diversity, and engagement of employers and employees on the committee, the continuing relevance of the industry standards developed, the connection to sustainable demand in the local or regional economy for the apprenticeship occupations, and other factors.

CAREER PATHWAYS:

Career Pathways are a series of connected education and training programs that allow individuals to advance their education and employment goals over time. They are connected to state and regional skill needs and enable individuals to secure a job or advance in a demand industry or occupation. They demonstrate technical skill proficiency and provide skill documentation tied to a specific occupation. These same things can be said of apprenticeship programs. Career Pathways align well with apprenticeships and portions of Career Pathways are often the related instruction of an apprenticeship.

Existing apprenticeship programs are typically connected with Career Pathways. New programs are encouraged to connect to Career Pathways through their local community college.

AVAILABILITY AND ACCESIBILITY OF NEW OR EXPANDED CURRICULUM:

The overall goal of Oregon AI is to build a supportive network in Oregon for registered apprenticeships in the advanced manufacturing and information technology industries. A component of building an Oregon network is expanding the reach of apprenticeship programs. Relevant related instruction curriculum available at any community college in the state provides an opportunity for more rapid geographic expansion of apprenticeships if and when economic conditions support it.

In addition, new or expanded curriculum developed is encouraged to incorporate online delivery which provides expanded geographic reach as well as increases the flexibility and accessibility of training by students. Incorporating accelerated training options including, but not limited to, training that is open entry-open exit and that allows student to move at their own pace is also encouraged.

SUSTAINABILITY:

Local, regional, and state economies change over time and the relative need for apprentices in all occupations changes accordingly. There are many factors beyond the control of an Apprenticeship Committee that affect the sustainability of an apprenticeship program. However, new or expanded apprenticeship programs in advanced manufacturing or

information technology are expected to be able to maintain or grow beyond the apprenticeship period supported by funds distributed through Oregon AI if economic conditions warrant.

WORKFORCE SYSTEM PARTNERHSIP:

The Oregon workforce development system (WDS) represents a number of public, private, and nonprofit organizations and a wide array of resources to enhance the job skills of Oregon's workforce and assist Oregon's employers in finding skilled workers. Apprenticeship Committees are encouraged to connect and partner with the workforce development system in order to potentially identify other resources available to support apprenticeships, better align efforts to support advanced manufacturing employers, and to help identify apprentices. Key partners include:

- Local Workforce Development Boards (LWDBs) who set priority for local and regional WDS resources including training resources and who are responsible for local and regional industry sector strategies that might include advanced manufacturing. A directory of Local WDBs can be found at Oregon Workforce Partnership - Local Boards.

- WorkSource Oregon (WSO) who is a one stop for many public resources focused on effectively responding to the employment needs of job seekers and businesses. WSO Centers are located in many communities throughout Oregon. A directory can be found at WorkSource Oregon Centers.

- Department of Human Services (DHS) who is responsible for additional public resources that could be used to support the success of apprentices (e.g. SNAP, TANF) and who is a champion of populations who are underrepresented in apprenticeships (women and minorities). Local offices can be found at DHS Self-Sufficiency Offices.