

# Primary Sector Workforce Training Grant (WTG) Program

How to Apply



# Program Overview

- Provides grant funds for primary sector businesses for training new and existing full-time workers
- Primary Sector Business:
  - At least 50% of sales from outside Montana or is a manufacturing company with 50% of its sales from companies that have 50% of their sales outside of Montana

OR

- Be a new business that provides a product or service that is not available in Montana, which results in residents leaving the state to purchase the product or service

# Program Overview



- Administered by the Department of Commerce
- A seven-member external Grant Review Committee makes grant award decisions
- Grant award is up to \$5000 for each full time job

# Eligibility

- Pay trainees at least the average wage for the area (state or county - whichever is lowest) including benefits

- The wage rates can be obtained at

<http://wtg.mt.gov/content/docs/WeeklyWageSheet.pdf>

- Benefits are those not mandated by law

## Examples:

- Health coverage
- Dental coverage
- Vacation
- Sick Leave
- 401K contributions

# Eligibility, cont.



- Demonstrate a need for education or training for the employees
- Demonstrate that the business expansion is financially feasible

# Match Requirements



- \$1 match for every \$3 grant money awarded
- Eligible Match Examples
  - Employee wages during training
  - Training costs in excess of the \$5,000 maximum
  - Building expansion
  - Equipment purchases

# Website

- <http://businessresources.mt.gov/WTG/default.mcpx>

The screenshot shows a Windows Internet Explorer browser window displaying the Montana Department of Commerce website. The address bar shows the URL <http://businessresources.mt.gov/WTG/default.mcpx>. The website header includes the **mt.gov** logo and the text "Montana's Official State Website" and "DEPARTMENT OF COMMERCE". A navigation menu contains links for Commerce Home, Business, Community, Housing, Tourism, Finance, Census, Calendar, and Search. On the left side, there is a "Select Project Summaries Based On A Funding Year" section with a dropdown menu set to "2010" and a "GO" button. Below this are links for Guidelines, Application, Sources/Uses, and Wage Rates. The main content area features the heading "PRIMARY SECTOR WORKFORCE TRAINING GRANT PROGRAM" and a sub-heading "GRANTS FOR TRAINING NEW & EXISTING WORKERS". A blue arrow points from the right side of the image to the "Guidelines" link in the sub-heading. Below the sub-heading are links for "Guidelines", "Application", "Sources/Uses", "Wage Rates", and "Confidentiality and Non-Disclosure Agreement". A red banner reads "REGISTER NOW TO ATTEND APPLICATION WORKSHOP WEBINAR to be held November 5, 2010 at 10:00 a.m.". The bottom of the page includes contact information for the Regional Development Bureau, Small Business Development Center Bureau, and Trade & International Relations Bureau.

- Guidelines and forms

# Application Form

Page 1



## APPENDIX A

### PRIMARY SECTOR WORKFORCE TRAINING GRANT PROGRAM

#### PROJECT APPLICATION FORM

##### APPLICANT INFORMATION

Business Name:	<input type="text"/>	Tax ID #:	<input type="text"/>
Contact Person:	<input type="text"/>	Title:	<input type="text"/>
Address:	<input type="text"/>		
City:	<input type="text"/>	State:	<input type="text"/>
		Zip:	<input type="text"/>
Email:	<input type="text"/>	Phone #:	<input type="text"/>

##### PROJECT SUMMARY

Total Amount of Grant Funds Requested:	<input type="text"/>		
Total Project Cost (must match Sources and Uses Statement):	<input type="text"/>		
Total Match:	<input type="text"/>	Current Employment Level:	<input type="text"/>
Total # of WTG eligible jobs to be created or retained:	<input type="text"/>		

##### Proposal Summary

Please provide a brief summary of this proposal which describes what WTG funds would be used for:

The undersigned authorized representative hereby certifies that the information in this application is correct to the best of his/her knowledge; s/he has received, read, and understood the guidelines for the grant and agrees to comply with all requirements; and s/he has the authority to act on behalf of the company in submitting this application.

	<input type="text"/>	<input type="text"/>
Signature	Date	Printed Name and Title

Total Project Cost must match Sources & Uses Statement



Briefly state the need for training and what the WTG funds would be used for



# Application Form

## Page 2



- Use as checklist when putting application together

### BUSINESS PLAN

Page #:

*See Application Guidelines: Grant Application Submittal Process, 1. Business Plan, page 6*  
Attach a current business plan which must contain sufficient information for the Department to obtain an adequate understanding of the business to be assisted, including the products or services offered, estimated market potential, principals' management experience, current financial position and proposed venture details.

### FINANCIAL STATEMENTS

Page #:

*See Application Guidelines: Grant Application Submittal Process, 2. Financial Statements, page 7*  
Attach the two most recent years of Balance Sheets, Profit and Loss Statements, and Cash Flow Statements

### FINANCIAL PROJECTIONS

Page #:

*See Application Guidelines: Grant Application Submittal Process, 3. Projections, page 7*  
Attach two years of projections of Balance Sheets, Profit and Loss Statements, and Cash Flow Statements

### HIRING AND TRAINING PLAN

Page #:

*See Application Guidelines: Grant Application Submittal Process, 4. Hiring and Training Plan, page 7*  
Attach a Hiring and Training Plan which must include the following:

- Annual payroll estimates pre and post-expansion and wages for each employee to be trained Page #:
- Description and monetary value of employee benefits for each position to be trained Page #:
- Number of new full time positions and timetable for phase-in of new employees, if applicable Page #:
- Procedures for outreach, recruitment, screening, selection, training and placement of workers Page #:
- Description of the training curriculum and resources and schedule for completion of worker training Page #:
- Training budget, including all costs associated with the training plan Page #:
- Assurance of equal opportunity and nondiscrimination laws compliance Page #:

### SOURCES & USES OF FUNDS STATEMENT

Page #:

*See Application Guidelines, page 12*

# Business Plan



- Includes at a Minimum:
  - Products and Services Offered
  - Estimated Market Potential
  - Principals' Management Experience
  - Current Financial Position
  - Proposed Venture Details

# Financial Statements



- Two most recent years of financial statements including:
  - Balance Sheet
  - Profit & Loss Statement
  - Cash Flow Statement
- Two years of projections including:
  - Balance Sheet
  - Profit & Loss Statement
  - Cash Flow Statement

# Hiring Plan Considerations



- Identify Job Categories to be hired
- Identify the timeline for hiring
  - Quarterly or Monthly
- Identify Sources
  - Job service
  - Local Media
  - Other

# Training Plan Considerations



- Identify job categories to be trained
- Identify the training needs for each category
- Identify how these needs will be fulfilled
- Identify the costs associated with fulfilling these needs

# Eligible Training Costs



- Direct training costs, such as:
  - training program promotion
  - instructor wages, per diem, and travel
  - curriculum development and training materials
  - lease of training equipment and training space
  - miscellaneous direct training costs (such as employee training-related travel)
  - administrative costs
  - assessment and testing
  - in-house or on-the-job training
  - subcontracted services with training providers.

# Sources & Uses Form



## APPENDIX B

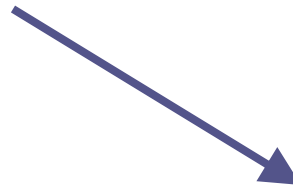
### PRIMARY SECTOR WORKFORCE TRAINING GRANT PROGRAM

#### SOURCES AND USES OF FUNDS STATEMENT

Please list all sources and uses of funding for the project. Include financing, grants, donations, equity. Indicate in the Commitment Status column whether proposed, requested, or approved. Examples of Uses of Funds are training, building construction, equipment purchases, etc.

Source	Amount	Commitment Status	Use of Funds
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
<b>Total Project Funding</b>	<b>\$</b>		

- This number must match the Total Project Cost on Page 1 of the Application



# Common Pitfalls



- Business Plan does not include Management Experience
- Financial Statements not included
- Training Budget not included
- Training Budget does not support amount of WTG funds requested
- Training Curriculum not included relative to proposed training
- Training Plan does not reflect costs associated with Training Budget
- Sources & Uses Total Project Funding does not match Total Project Cost on Application Form

# Grant Examples

- Centene Corporation – Great Falls
  - Awarded \$400,000 to train 80 employees in 2005
  - Completed first grant and was awarded a 2<sup>nd</sup> grant for \$480,700 for 100 employees in 2007



# Grant Examples

- BioScience Laboratories – Bozeman
  - Awarded \$50,000 to train 10 employees



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# Grant Examples

- SRS Crisafulli – Glendive
  - Awarded \$99,225 to train 34 employees



# Questions?



## Staff Contact Information:

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