

Individual Training Account (ITA) Policy

Effective Date: 6/01/2021

Duration: Indefinite



Background

WIOA is designed to increase participant access to training services, equip individuals to enter the workforce and retain employment. Examples of WIOA training services as a whole include:

- occupational skills training, including training for non-traditional employment;
- on-the-job training (OJT), including registered apprenticeship;
- incumbent worker training in accordance with WIOA §134(d)(4);
- workplace training and cooperative education programs;
- private sector training programs;
- skills upgrading and retraining;
- entrepreneurial training;
- transitional jobs in accordance with WIOA §134(d)(5);
- job readiness training provided in combination with other training described above;
- adult education and literacy activities, including activities of English language acquisition and integrated education and training programs, in combination with training; and
- customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training.

Individual Training Account (ITA)

An Individual Training Account (ITA) is used by a WIOA participant to access training services from an entity on the State's approved Eligible Training Provider List (ETPL). ITAs are used to train for in-demand occupations as identified across the entire State as well as for those specifically defined by NETLWDB policy. (20 CFR 680.340(f)). ITAs are developed following a comprehensive and documented assessment of the participant. In addition to using ITAs to for training services, WIOA incorporates the issuance of ITAs for apprenticeship programs. Priority of service must be provided regardless of the level of funds available as defined in US DOL and TDLWD guidance. Although a program or institution may meet the criteria for inclusion on Statewide ETPL, funding may not be provided for programs for which the outcomes have not been appropriate for WIOA performance measures or for which the labor market has limited demand or is at risk of job loss. WIOA funds may be used for support and other eligible needs of the participant while coordinating funding with funding from other Federal, State, local, or private job training programs or resources to assist the participant in obtaining training services.

ITAs are one WIOA training option available to eligible and appropriate participants when it is determined by a Career Coordinator or Specialist that they will be unlikely or unable to obtain or retain employment that leads to self-sufficiency or higher wages from previous employment through career services alone. Participants choose career training with Eligible Training Providers in consultation with the Career Coordinator or Specialist. Before receiving training services under WIOA eligibility determination is required. ITAs are not entitlements and shall be provided to eligible participants on the basis of an individualized assessment of the person's job readiness, employment and training needs, financial, social and supportive needs, labor market demand and potential for successful completion, as documented on the participant's Individual Employment Plan (IEP) or Individual Service Strategy (ISS).

Training services may be made available to employed and unemployed Adults and Dislocated Workers and Out-of-School Youth who:

- 1) after a determination of need is made using an employment plan:
 - a) is unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services;
 - b) is in need of training services to obtain or retain employment leading to economic self-sufficiency or wages comparable to or higher than wages from previous employment; **and**
 - c) has the skills and qualifications to participate successfully in training services;
- 2) have selected a program of training services that is directly linked to:
 - a) occupations that are on the Board's targeted occupations list, or are on the targeted occupations list for another local workforce development area (workforce area) to which an adult or dislocated worker is willing to commute or relocate; or
 - b) occupations that have been determined on a case-by-case basis to have a high potential for sustained demand and growth in the workforce area, based on sufficient and verifiable documentation, in accordance with the Board's procedures and WIOA guidance; **and**
 - c) are unable to obtain grant assistance from other sources to pay the total costs of such training and related support services, including such sources as state-funded training funds such as TN Promise and Reconnect, Trade Adjustment Assistance (TAA), SNAP E&T, and Federal Financial Aid including Pell Grants or require WIOA assistance in addition to other sources of grant assistance as determined by the Student Need Assessment and Remaining Need. WIOA funds supplement other sources of training grants. Post-secondary education providers must release a participant's financial aid information.

Training Entry Requirements:

- 1) Minimum entry-level requirements for training will include a high school diploma or its equivalency and a reading or math score at or above a 7th grade level. Exceptions to the reading and math skills may be reviewed and waived according to NETLWDB policy. Regardless of how basic skills deficiency is determined, documentation must be maintained in the participant file.
- 2) An Individual Training Account (ITA) must be issued prior to the participant beginning WIOA paid training if WIOA is paying any part of the training items covered by an ITA (tuition, books, fees, etc. depending on the curriculum and the school requirements) or Customized Training (CT) Contract. An ITA will be issued for an amount no more than the actual cost of the tuition and books not covered by other grants or financial assistance. Funding must be coordinated with Federal and State financial aid.
- 3) Some academic/training programs have specific program/curriculum of study admission criteria in addition to the general school admission requirements. Applicants must have completed all required courses prior to making application for these programs. In these situations, WIOA will not pay for prerequisite coursework. The applicant must have received their formal notification in writing of acceptance into these types of programs/curricula of study before being considered for WIOA enrollment.
- 4) Tools, equipment or other necessary training materials required by the course of study may be provided as a training expense. Items must be listed on the course outline and/or syllabus. Where available and appropriate, tools and other items will be purchased through the training institution.

- 5) All participants registered in training services are required to meet standards of progress.
- 6) Participants must submit attendance forms and grades in order to be issued additional ITAs up to the maximum 52 weeks of training. Verified attendance forms will be required of all WIOA participants in training programs. WIOA participants will be required to adhere to attendance policies as established by the training institutions.
- 7) WIOA participants must maintain a cumulative 2.0 GPA (C average). If grade point average falls below this standard, WIOA may refuse to pay.
- 8) WIOA will not pay for any classes not required in the curriculum in which a participant is enrolled.
- 9) WIOA funding may not be utilized to pay for any courses to be repeated in the event a participant fails a course or withdrawal after payment has been invoiced. Emergency and extenuating circumstances will be reviewed and addressed on a case-by-case basis.

In recognition of the ubiquity of on-line learning opportunities, NETLWDA will consider requests for WIOA training and support of technology-based learning on a case-by-case basis. Distance training/learning is training that makes use of the Internet for assignment of lessons, submission of completed tasks and on-line discussions. The approval of distance learning is based on the interactive nature of the classroom training experience between the instructor and the student. Distance learning is approvable only when it is part of a curriculum that leads to the completion of a training program, requires students to interact with instructors and requires students to take periodic tests to demonstrate progress.

Priority will be given to Tennessee residents. Referrals will be made to the closest appropriate American Job Center.

INDIVIDUAL TRAINING ACCOUNT (ITA)

ITAs are used to train for in-demand occupations as identified across the entire State as well as for those specifically defined by NETLWDB policy. (20 CFR 680.340(f)). ITAs are developed following a comprehensive and documented participant assessment. In addition to using ITAs for training services, WIOA incorporates the issuance of ITAs for apprenticeship programs. Priority of service must be provided regardless of the level of funds available as defined in US DOL and TDLWD guidance. Although a program or institution may meet the criteria for inclusion on Statewide ETPL, funding may not be provided for programs for which the outcomes have not been appropriate for WIOA performance measures or for which the labor market has limited demand or is at risk of job loss.

1. ITAs can be issued for up to 52 weeks at an amount not to exceed \$3,000 by the Career Service Provider and Youth Contract Career Coordinators and Career Specialists. Training will be approved in term increments based on the current Program Year (July 1 – June 30). The total cost of training may cross more than one Program Year. The costs of training for the first year are calculated from the training start date through June 30th of the current fiscal year. ITAs will be issued on a term basis not to exceed a total of 104 weeks of training.
2. Based on the training institution's approved curriculum and cost sheet, the purchase of tools for the successful completion of training may be appropriate. The purchase of tools for training is based on individual participant need and program requirements. If approved, the purchase of training required tools may be above and beyond the ITA cap outlined above.
3. The participant is responsible for all costs associated with the approved training not covered by the WIOA ITA and/or available support services, in coordination with Federal and State financial aid.
4. Participants must attend training on a full-time status as defined by the training institution.

Participants are allowed to attend on a part-time status during their last year based on the numbers of classes required to complete their curriculum.

5. Funding for training may be provided up to, but may not exceed, remaining need amount in coordination of WIOA and other funding resources.
6. Participants may receive supportive services to help defray expenses and promote successful training completion up to the amount \$10.00 per day of attendance contingent upon Remaining Need.
7. A participant may be eligible for 52-week increment ITAs at point that a Community College student completes Learning Support.
8. WIOA funds may be used for Bachelor's Degrees for Dislocated Workers provided that the individual can complete the degree in less than or equal to 104 weeks of training for participants.
9. WIOA may be used for a Dislocated Worker who already possesses a Bachelor's Degree to pursue a teaching degree in a demand teaching occupation such as science, technology, engineering, or math. Training must be completed less than or equal to 52 weeks of training.

FUNDING COORDINATION POLICY FOR WIOA AND OTHER FINANCIAL RESOURCES

A WIOA participant may enroll in WIOA funded training while the participant's application for a Federal Financial Aid (FAFSA) is pending. This enrollment is permitted as long as the NETLWDB One-Stop Operator has made arrangements with the training provider and the WIOA participant regarding allocation of the Financial Aid, if it is subsequently awarded. In that case, the training provider must reimburse all WIOA funds used to underwrite the training for the amount that Financial aid covers (WIOA Section 134(c)(3)(B)(ii)). Reimbursement is not required from the portion of Financial Aid assistance disbursed to the WIOA participant for education-related expenses. The NETLWDB must ensure that WIOA funds are not used to pay training costs for any portion or term of training that were paid by the participant (or other source) prior to WIOA program registration. A FAFSA application determination must be completed and available as part of the Student Need Assessment and Remaining Need determination prior to the issuance of an ITA for funding after the first training term as required by WIOA.

A participant may receive WIOA funds to the extent of meeting the student's need for such assistance, as defined by the institution's Financial Aid Office in their process of determining cost of attendance (education and education-related costs) and unmet need. WIOA ITA funds will be leveraged for participants who qualify for Federal and State financial assistance, excluding loans. WIOA funds may be coordinated to cover both training costs and supportive services within the limitation of the student's need. All participants must apply for Financial Aid (FAFSA), excluding loans, if attending an institution that is eligible to receive WIOA funds. As a general rule, financial aid application must occur at least ten (10) working days prior to the start of the approved training program.

OTHER TRAINING SERVICES (Please refer to NETLWDB Policy on Work Based Learning and Consolidated Business Services.)

CONTACT: Questions concerning the above may be addressed to Kathy Pierce, Executive Director of the NETLWDB at kpierce@ab-t.org.

This policy will remain in effect until amended, modified, or set aside by the Northeast Tennessee Local Workforce Development Board.

APPROVED:



James Osborne
NETLWDB Chair