



POLICY: INDIVIDUAL TRAINING ACCOUNT (ITA)

EFFECTIVE DATE: **POLICY NUMBER: 2017-11**

PURPOSE

The policy on Individual Training Accounts (ITA) ensures that every Workforce Innovation and Opportunity Act (WIOA) participant receives quality services. This policy outlines steps to ensure that eligible and suitable job seekers have opportunities for training in vocations from the High Priority Occupations list according to the Montgomery County Workforce Development Board (WDB).

BACKGROUND

WIOA Title-I training services for eligible adults, dislocated workers and youth are provided through ITAs. Using ITA funds, eligible adults, dislocated workers and youth can use funds for training services from eligible training providers they select through WSM Career Specialist. Participants are expected to utilize information such as skills assessment, labor market information and training providers' performance and take an active role in managing their employment future through the use of ITAs.

CANCELLATIONS

This policy supersedes all pre-existing policies for ITAs.

ACTION REQUIRED

Within 15 days of the receipt of this policy it is the recipient's responsibility to ensure all staff are informed of the policy and to create an internal process to ensure accountability.

QUESTIONS

Questions relating to this policy should be directed to the Director, Talent Development / WIOA at policy@worksourcemontgomery.com, or 240-641-6736.

POLICY

Participants seeking an ITA must apply for financial aid (if appropriate) during their career research and before requesting access to WIOA funds. WorkSource Montgomery AJC staff should be assisting customers with the FAFSA process; information is available at www.fafsa.ed.gov. WorkSource Montgomery Staff should notify participants that any financial aid received may reduce the funding provided by WorkSource Montgomery, Inc.

Each participant is required to conduct research and prepare a training plan prior to submitting a written request for training funds. The following must be documented in the request:

- The occupations for which the training will prepare the participant;
- The local employment projections for the specific occupation(s);
- The entry level salaries of these positions;
- A comparison of two (2) training providers from the State Approved Eligible Training Provider List that offer the specific training requested (if available);
- Evidence that the position is on the High Priority Occupation list;
- A statement regarding how the remaining tuition balance will be satisfied if the course amount exceeds the allowable WorkSource Montgomery, Inc. funding.

Customers seeking an ITA must first successfully complete assessments. The scores on the assessments must be equal to or higher for the particular profession the customer is interested in pursuing. Results must show aptitude in the field of training. If the scores do not meet such threshold, remediation would be required.

The appropriate Career Specialist will confirm with WorkSource Montgomery's Director that the training providers being considered have an existing contract. If a contract has not been established, the Title I provider will prepare a contract within 48 hours and will forward it to the Training Provider. WorkSource Montgomery Center staff should not refer clients to any school or course until the contract has been signed.

Once the participant has completed the necessary research and appropriate assessments, the Career Specialist will meet with him/her to review the findings of the research and determine if the proposed training is an effective career and training option/opportunity. The ITA Check List must also be reviewed with the participant and attached to the request. The case file must contain a determination of need for training services as identified in the participant's Individual Employment Plan (IEP).

Once the Eligible Trainee has submitted their training plan the following must occur:

- The Career Specialist will sign and date the ITA Check List verifying all data is complete and correct.
- The Career Specialist will complete a Training Referral and give it to the Eligible Trainee who will take the Training Referral to the Training Provider to complete the Provider's section. The Eligible Trainee will return the completed form to the Career Specialist.
- The Career Specialist will submit the following to the Director for review:
 - ITA Check List
 - Training Referral
 - Print out of courses from Eligible Training Providers list
 - Case Notes evidence of participant's research in Training Providers and courses
 - The Title I Director will review all of the material and approves the request
 - Should the Director deny the request, the entire packet will be returned to the Career Specialist with the reason(s) for denial
 - The Career Specialist will then meet with the participant and review the reason for denial.

It is important to inform the participant of this process

- The Title I provider will complete the Individual Training Account (ITA) agreement letter and mail the original to the Training Provider; a copy will be forwarded to the Career Specialist.
- The Career Specialist must verify the client is attending training and will be in communication with the training provider.
- The Career Specialist is to remain in continuous communication with customers enrolled in ITAs, as the goal is to place ITA completers into occupations for which training funds were invested.

FUNDING

The funding for ITAs contract is \$3,500 and is subject to the availability of funds.

DISCLAIMER

This policy is based on WSM's interpretation of the statute, along with the Workforce Investment and Opportunity Act; Final Rule released by the U.S. Department of Labor and federal and state policies relating to WIOA implementation. This policy will be reviewed and updated based on any additional federal or state guidance.