Tri-County Workforce Investment Board, Inc.

Individual Training Account Policy

Purpose: WIOA training services for eligible individuals can be provided by training providers who receive payment for their services through an Individual Training Account (ITA). The ITA is a payment agreement established on behalf of a participant with a training provider.

References:
WIOA Section 134(c)(3)
Workforce Innovation and Opportunity Act Regulations, 20 CFR Parts 680, 683
PA Workforce System Policy No. 06-2015: Training Expenditure Targets and Definitions of Types of Training for Benchmarks

Policy: The Tri-County Workforce Investment Board, Inc. (TCWIB) shall provide authorized training services to eligible Adults, Dislocated Workers, and Youth utilizing individual training accounts established on behalf of the client so they may purchase training services for skills in high demand occupations from eligible training providers. The investment of funds will be driven by the local area's strategic priorities, high priority occupations (HPOs), and related targeted industry clusters as well as consumer choice. The training must result in a recognized postsecondary industry credential that will be utilized for employment.

The ITA Funding Cap for the Tri-County Workforce Development area is $7,500. Special funding such as NEG grants may have different funding caps or eligibility requirements. ITA funding is not guaranteed to any participant and is contingent on funding availability. An ITA may be used for the following expenses: tuition, application fees, tools and/or uniforms, and/or any costs of the program that is required and is included on the PA CareerLink® website listing.

The maximum duration limit of an ITA is 2 years.

ITAs will not be issued to any student who does not have a high school diploma, GED or equivalent.

Individuals who receive ITA funding can only reapply every 5 years.

Procedures: A formal Contract is executed for an ITA through the WIOA Title I provider and a Master Agreement (Non-Financial Agreement) is executed through the Workforce Development Board. The school submits the invoice(s) for payment based on the period breakdown on the Individual Training Contract (such as per semester, term, class, etc.).

WIOA title I adult, dislocated workers, and youth purchase training services from the State eligible training providers they select in consultation with the WIOA Title I staff, which includes discussion of program quality and performance information on the available eligible training providers. Training must be an approved program or course listed on the Pennsylvania Eligible Training Program/Provider list and must be for an occupation listed on the current High Priority Occupation (HPO) list.

The need for training services is determined after an interview, evaluation, and objective assessment. To assist in determining suitability for a particular training program, all training decisions are determined after completion of a comprehensive vocational screening assessment.

ITAs may only be issued after the following determinations and activities have taken place.

- The participant has been determined eligible.
- The participant has had a career interest assessment and a fully completed objective assessment.
- An individual employment plan (IEP) or individual service strategy (ISS) has been jointly developed between the participant and the Case Manager utilizing the results of the interview, evaluation or objective assessment. The IEP/ISS must identify the participant's employment goals, the appropriate achievement objectives, the combination of services required to achieve the employment goals, and the program of training selected to directly link the participant to the employment opportunities in the local area or in another area where the participant is willing to relocate. Goals should be established using career interest assessments along with a fully completed objective assessment.
- The participant has been given the opportunity to review the State eligible training provider list and the High Priority Occupation List so the participant may make an informed choice in the selection of a training provider and program.
- The participant has the skills and qualifications necessary to complete a selected training program.
- It has been determined the participant is unable to obtain full financial assistance from other sources to pay for the cost of training such as Trade Adjustment Assistance, Pell Grants, Welfare to Work Programs, State training funds, or will require financial assistance in addition to the other sources of funds. Students are required to complete financial aid forms if the program qualifies. Pell and PHEAA and related grants must be utilized before payment of ITA funds can begin. The local board will work cooperatively with OVR to share training expenses. In addition, students must indicate how the remaining costs (over and beyond the ITA) of training will be funded.

WDB Approved 9/22/17

Revised and WDB Approved 9/21/18. Local Plan Modification Approved 12/20/18.