

5300POL Individual Training Accounts (Rev1)

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This policy provides guidance on Individual Training Accounts (ITAs) for WIOA Title I-B Adult, Dislocated Worker and Out-of-School Youth participants who are found eligible for training services (see *5500POL Service Guidance*) within the Olympic Workforce Development Council (OWDC) three counties.

1. **ITA is an account internally managed by the provider to obligate funds so that a customer can receive training with an eligible training provider.** It is not a voucher given to a customer to purchase training and requires close monitoring of ITA obligations.
2. **Training services purchased with ITA funds require:**
 - a. Direct links to occupations in-demand (see *5511 Occupation In-Demand and Labor Market Information*) and training/education that leads participant to economic self-sufficiency.
 - b. Training providers listed on Washington's State Eligible Training provide List (ETPL), *Career Bridge*.
 - i. **Exceptions:**
 - The OWDC determines there are an insufficient number of eligible providers of training services in any part of the Consortium's Workforce Development Area involved to accomplish the purposes of a system of individual training accounts.
 - The OWDC determines that there is a training services program of demonstrated effectiveness offered in the local area by a community-based organization or another private organization to serve individuals with barriers to employment.
 - OWDC may approve training services for occupations determined by the Council to be in sectors of the economy that may have a high potential for sustained demand or growth in the local area.
 - ii. If a program is removed from the state ETPL, WIOA participants in the program can complete the training and ITA modified or extended participants beyond the original plan approval.
 - c. WIOA Title I-B program enrollment (see *5100POL Program Eligibility, 5110, 5120, & 5130*).
 - d. Consideration of availability grants/resources, excluding loans, to pay for training so that WIOA funds are used to supplement but not supplant other sources.
 - e. Case Manager (CM) consultation and participant assessment through interview and discussion for selected education or training program. Assessment includes thorough Individual Employment Plan (IEP) discussion and documentation in state MIS.
 - f. It is the responsibility of the service provider to determine which customers qualify to receive training and to refer them to an Eligible Training Provider of their choice based on an assessed need for training by the service provider.
3. **ITA funds are obligated and authorized through subrecipient purchase order or voucher and**
 - a. An ITA award could fund prerequisite training to a vocational training program if it is required by the educational institution.
 - b. Expenditures that qualify to be paid through ITAs are those directly related to training such as tuition, books, academic fees, educational testing and certification, and equipment and tools.

- c. A participant must enroll in school within 90-days of ITA approval.
 - d. Satisfactory progress for an individual must be documented in the participant file (MIS case note or copy of grade report), except for good cause. This is to ensure that the conditions of the ITA are being met before subsequent payments are made. Satisfactory progress is defined as follows:
 - i. The individual's grade point average does not fall below 2.0 for more than one consecutive quarter
 - ii. The individual maintains a grade point average sufficient to graduate from, or receive certification in, their approved area of study; and
 - iii. The individual is completing sufficient credit hours to finish their approved course of study within the time frame established under their approved training plan.
 - iv. In the case of self-paced or non-graded learning programs, satisfactory progress means participating in classes and passing certification examinations within the time frame established under their approved training plan.
 - e. Failure to make satisfactory progress in training as including specific factors that would cause a reasonably prudent person in similar circumstances to fail to make satisfactory progress. Good cause includes, but is not limited to:
 - i. Illness, injury or disability of the participant or a member of the participant's immediate family
 - ii. Severe weather conditions or natural disaster precluding safe travel
 - iii. Destruction of the participant's school records due to a natural disaster or other catastrophe not caused by the participant
 - iv. Acting on advice received from an authority such as the training provider, instructor, or case manager
 - v. Training is delayed or cancelled
 - vi. Accepting stop-gap employment with hours or other work conditions that conflict with the training
 - vii. Accepting goal-related employment prior to completion of training.
4. **ITA Funding limits for tuition and fees is a maximum of the cost of two years tuition and expenses for an in-state student at Washington community or technical college.**
- a. The amount and duration of an ITA award shall be determined on an individual basis.
 - b. CM will consider any other financial assistance available to the participant and ensure justification documentation is recorded in MIS.
 - c. Other costs associated with training such as parking fees, school supplies, parking passes, licenses, books, uniforms, background checks, driving abstracts, etc. may be considered training costs and are not included in tuition and fees.
5. **ITA modification should be limited to meet the training participant's needs throughout training and educational services.**

REFERENCES

Eligibility Policy and Handbook, [WorkSource System Policy 1019 \(Rev10\)](#)
 Governor's Procedures for Determining Training Provider Eligibility, [Workforce Innovation and Opportunity Act Policy 5611 \(Rev3\)](#)
 Individual Training Accounts, [Workforce Innovation and Opportunity Act Policy 5601 \(Rev2\)](#)
 Pay-for-Performance Contract Strategies, Code of Federal Regulations Title 20, Chapter V, Part 683, Subpart E, [20 CFR §683.510](#)
 Under what circumstances may mechanisms other than ITA be used to provide training services, Code of Federal Regulations Title 20, Chapter V, Part 680 Subpart C, [20 CFR §680.320](#)
 Use of Funds for Employment and Training Activities, Workforce Innovation and Opportunity Act Final Law H.R. 803 (113-128) [134\(d\)\(3\)\(C\),134\(d\)\(3\)\(C\)\(vi\)](#)