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Subject: Individual Training Accounts (ITA)

1. Purpose: Individual Training Accounts (ITAs) will be the funding mechanism for classroom and occupational skills training services. Considering reasonableness of cost for a selected program of training, the Title I Operators will issue a training voucher up to a prescribed amount, but not to exceed the maximum allowance per person, per year. Such voucher may be used only for tuition and related education costs (books, fees, etc.) for the approved program of training. The voucher amount will be reduced proportionate to other financial resources available to the customer.
2. Substance: ITA guidelines are as follows:
 - \$10,000 maximum per participant, per program year;
 - Must be a WIOA Adult, Dislocated Worker, or WIOA Out-of-School Youth with a training level enrollment;
 - ITA's will only be written for participant's whose permanent residence is in the South-Central region;
 - WIOA approved training providers & programs can be found on the Eligible Training Provider System (ETPS). A printout from the ETPS system showing the approved program is required in the participant's file;
 - Training time limitation –maximum two (2) years. The two (2) year time period is designed to enable a participant to acquire an associate degree or finish a bachelor's degree;
 - Participants will only receive one (1) ITA funded training service at a time.
 - Pre-requisites will be approved on a case-by-case basis by the WIOA Lead; pre-requisites are included in the two (2) year time limitation;
 - Participants must provide required course list to the WIOA staff. The WIOA staff member will use this list and class schedule to be sure WIOA is paying for required courses. A class schedule must be provided to the WIOA staff;
 - WIOA will not pay for repeated courses;
 - Participants must be unable to obtain other grant assistance or require assistance beyond the assistance made available, including Federal Pell Grants; WIOA is funding of last resort;

- If receiving a Federal Pell Grant, the participant must apply 100% of PELL grant to their training costs before WIOA funding is utilized.
- Participants that already have an in-demand degree may not receive an ITA;
- Participants must have the skills and qualifications necessary to successfully participate in the selected program of training. Staff will determine this through participant interviews and discussions. Additionally, staff can use standardized testing to justify the training such as, but not limited to:
 - National Career Readiness Certificate (NCRC) scores must meet or exceed Missouri Economic Research & Information Center (MERIC) recommended scores for chosen training field. If a participant is unable to achieve the required scores, a waiver request must be made to WDB staff for training approval; or
 - TABE or CASAS scores must meet “High Adult Secondary Education” levels and must be administered within 12 months of training activity start date; or
 - Recent college placement test accepted by the approved training provider.
- Training must be in an occupation that leads to economic self-sufficiency or wages comparable to or higher than the wages from previous employment and directly linked to the employment opportunities in the local area (or an area the participant is willing to relocate to), source documentation required, with a rating of “B” or better;
- ITA funded amount is contingent on availability of funds and unmet financial need of the participant;
- Participant must submit passing grades from the previous semester before staff processes next semester’s ITA payment voucher;
- If a participant or a program is not PELL eligible staff must document this in the statewide case-management system;
- Participant and WIOA staff must complete an “ITA Participant Contract Form”; and
- The ITA commitment must be documented in the statewide case-management system. The total cost of training should be documented in the statewide case-management system **after** the ITA is paid.
- Exceptions for the above limits can be made by the SCWIB Executive Director, on a case-by-case basis, at the request of the job center staff with the documentation of participant need.

3. Non-ITA Exception

If a participant is interested in training that is not WIOA approved on Missouri’s ETPS, the SCWIB may pay for services utilizing a contract following the guidelines below **and** the SCWIB’s procurement policy. In order to utilize a contract, the requirements of customer choice outlined in 20 CFR 680.340 must be fulfilled **and** one or more of the following must be met:

(1)When the services provided are on-the-job-training (OJT), customized training, incumbent worker training, or transitional jobs.

(2) When the Local WDB determines that there is a training services program of demonstrated effectiveness offered in the area by a community-based organization or another private organization to serve individuals with barriers to employment, such as

- Displaced homemakers;
- Low-income individuals;
- Indians, Alaska Natives, and Native Hawaiians;
- Individuals with disabilities;
- Older individuals, *i.e.*, those aged 55 or over;
- Ex-offenders;
- Homeless individuals;
- Youth who are in or have aged out of the foster care system;
- Individuals who are English language learners, individuals who have low levels of literacy, and individuals facing substantial cultural barriers;
- Eligible migrant and seasonal farmworkers, defined in WIOA sec. 167(i);
- Individuals within 2 years of exhausting lifetime eligibility under TANF (part A of title IV of the Social Security Act);
- Single parents (including single pregnant women);
- Long-term unemployed individuals; or
- Other groups determined by the Governor to have barriers to employment.

(3) When the Local WDB determines that it would be most appropriate to contract with an institution of higher education or other provider of training services to facilitate the training of multiple individuals in in-demand industry sectors or occupations, provided that the contract does not limit consumer choice.

Selection Process for Non-ITA Funded Training Providers

- The non-ITA training provider must be located in the South-Central Region.
 - Staff will research the training provider and/or program to determine prior program success. Research should include:
 - Financial stability of the organization;
 - Demonstrated performance in the delivery of services to individuals with barriers to employment through such means as program completion rate; attainment of the skills, certificates, or degrees the program is designed to provide; placement after training in unsubsidized employment; and retention in employment; and
 - How the specific program relates to the local workforce investment needs.
 - Staff will inform the One-Stop Operator of the participant's desire to attend a non-ITA training and discuss the provider's/program's success rate.
 - The One-Stop Operator and the SCWIB Director will collaborate to make the final determination based on the requirements outlined in this policy, consumer choice requirements, and the local procurement policy.
4. Please direct comments or questions regarding this policy to Scott Davis, Quality Assurance/EEO Compliance Officer at 417-257-2630 or email sdavis@scwib.org.
5. Reference: Workforce Innovation and Opportunity Act of 2015, Department of Labor Proposed Rules, TEGL 21-16 and related state issuances.