

Monterey County Workforce Investment Board (WIB)
LOCAL POLICY BULLETIN #2011-04



Effective Date: June 29, 2000
 Revision Date: June 1, 2011 WIB meeting
 Supersedes WIB Policy: ITA Policy 2000
 Full WIB Adopted: June 1, 2011 WIB meeting

TO: All Monterey County Program Operators, One-Stop Service Providers and WIB Subcontractors who provide training services to eligible individuals funded under the Workforce Investment Act (WIA).

SUBJECT: Individual Training Accounts (ITA)

PURPOSE: The purpose of this policy is to provide guidelines for implementing Individual Training Accounts (ITA) that is flexible and maximizes informed customer choice in selecting an eligible training provider. This policy sets the training limit amount and duration of ITAs developed for eligible individuals funded under the WIA within Monterey County.

REFERENCE:

WIA Section 134(d)(4)(G)(iv), Required Local Employment and Training Activities
 WIA Section 195(12), General Program Requirements
 WIA Final Rule Sections 663.310(b)(c)(d)
 WIA Final Rule Section 663.320, Amount or Duration Limits on ITAs
 WIA Final Rule Section 663.400-440, Individual Training Accounts
 EDD WIAD04-4, Recovery of WIA Tuition and Training Refunds
 EDD WIAD06-21, Workforce Training Act (SB 293) Implementation Guidance

POLICY: Training services may be made available to employed and unemployed adults and dislocated workers:

- Who have met the eligibility requirements for training services. (*Reference WIA Eligibility Technical Assistance Guide, WIB Policy 2011-03 Tiered Service Levels – Core, Intensive and Training Services and WIB Policy 2011-01 Lower Living Standard Income Level and Poverty Guidelines*);
- Who are unable to obtain grant assistance from other sources such as PELL grants or Trade Adjustment Act or require WIA assistance in addition to other sources of grant assistance;
- Who select a program of training services that is directly linked to employment opportunities in either the local area in which they reside or in areas where they are willing to locate;
- Who select a program that maximizes informed customer choice and may only be purchased through training providers that are on the State's list of eligible training providers (ETPL) located at www.montereycountywib.org/programs/training/; and
- Have been assessed using the WorkKeys® Readiness Indicator tool to determine an individual's readiness for WorkKeys® testing. Based upon the testing results, participants are either referred to the Worldwide Interactive Network (WIN) for remediation training or referred to an Authorized WorkKeys® location to complete an assessment. Authorized WorkKeys® assessments and WIN remedial training may be provided by appointment through partners of the Central Coast Career Readiness Consortium by contacting the Monterey County Business Council at (831) 883-9443 or Salinas One Stop Career Center at (831) 796-3600.

Individual Training Accounts may not exceed the following restrictions:

- ITA may not be written in amounts that exceed five thousand (\$5,000) dollars;
- Maximum training time for an ITA will be twelve (12) months; and
- Monterey County WIA funded service providers must request, in writing, and receive permission from the Monterey County WIB staff to exceed the amount cap of \$5,000 and or the duration cap of 12 months.

INQUIRIES: For questions or assistance related to this policy, please contact the Monterey County Workforce Investment Board (MCWIB) staff at (831) 796-6434.

This policy will be posted to the MCWIB website located at: www.montereycountywib.org/policies/