



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

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Supersedes WIB Policy: ITA Policy 2000
Full WIB Adopted: June 4, 2014

TO: All Monterey County Providers of Workforce Investment Act (WIA) Title I Services

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. It also specifies that WIA training is only provided for the high demand/high growth industries identified in this policy.

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 WIA Title I eligible 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, within the WIB's priority industry sectors, 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 registered and WIA eligible on the State's Eligible Training Provider List (ETPL) through CalJOBS, located online at: www.caljobs.ca.gov; and
- Who have completed the WorkKeys® (Applied Math, Locating Information, and Reading for Information) assessments prior to the start of any WIA Title I funded training activity. Service Providers must implement a plan to schedule and proctor participants to complete the WorkKeys® assessments prior to training. Authorized WorkKeys® assessments and Worldwide Interactive Network (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, the America's Job Center of California in Monterey County at (831) 796-3600, or WIB staff at (831) 796-6434. Service Providers are encouraged to work with the Central Coast Career Readiness Consortium to access their WorkKeys® assessment and WIN training sites to potentially allow for greater convenience for participants.

Advanced Training / Occupational Skills Training may be made available to WIA Title I eligible youth:

- Who have met the eligibility requirements for participation in secondary school, post-secondary school, adult education programs, or any other organized program of study leading to a degree or certificate;
- 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 have completed the WorkKeys® (Applied Math, Locating Information, and Reading for Information) assessments prior to the start of any WIA Title I funded training activity; and
 - Who are enrolled in training to include: (1) outcome-oriented and focused on a long-term goal as specified in the Individual Service Strategy, (2) long-term in nature and commence upon program exit rather than being short-term training that is part of service received while enrolled in WIA funded youth programs, and (3) result in the attainment of a certificate. A certificate is awarded in recognition of an individual's attainment of measurable technical or occupational skills necessary to gain employment or advance within an occupation. These technical or occupational skills are based on standards developed or endorsed by employers. Certificates awarded by WIB's are not included in this definition. Work readiness certificates are also not included in this definition. A certificate is awarded in recognition of an individual's attainment of technical or occupational skills by:
 - A state educational agency or a state agency responsible for administering vocational and technical education within a state.
 - An institution of higher education described in Section 102 of the Higher Education Act (20 USC 1002) that is qualified to participate in the student financial assistance programs authorized by Title IV of that Act. This includes community colleges, proprietary schools, and all other institutions of higher education that are eligible to participate in federal student financial aid programs.
 - A professional, industry, or employer organization (e.g., National Institute for Automotive Service Excellence certification, National Institute for Metalworking Skills, Inc., Machining Level I credential) or a product manufacturer or developer (e.g., Microsoft Certified Database Administrator, Certified Novell Engineer, Sun Certified Java Programmer) using a valid and reliable assessment of an individual's knowledge, skills, and abilities.
 - A registered apprenticeship program.
 - A public regulatory agency, upon an individual's fulfillment of educational, work experience, or skill requirements that are legally necessary for an individual to use an occupational or professional title or to practice an occupation or profession (e.g., FAA aviation mechanic certification, state certified asbestos inspector).
 - A program that has been approved by the Department of Veterans Affairs to offer education benefits to veterans and other eligible persons.
 - Job Corps centers that issue certificates.
 - Institutions of higher education which is formally controlled, or has been formally sanctioned, or chartered, by the governing body of an Indian tribe or tribes.

The training requirements listed below apply to all Monterey County WIA Title I Service Providers:

- A minimum of seventy-five percent (75%) of ITA funds must be dedicated toward training in the following four (4) priority industry sectors: Agriculture, Tourism & Hospitality, Education & Research, and Health & Social Assistance;
- Training for WIA Title I eligible adults and dislocated workers may not be written in amounts that exceed five thousand (\$5,000) dollars, per enrolled individual;
- Post-secondary education and/or advanced training/occupational skills training for WIA Title I eligible youth may not be written in amounts that exceed five thousand (\$5,000) dollars, per enrolled individual;
- Maximum training time will be twelve (12) months; and
- Monterey County WIA funded service providers and subcontractors must request, in writing, and receive permission from the Monterey County WIB staff to exceed the cap amount of \$5,000 and/or to exceed the duration cap of 12 months. The request must include the entire participant case file with succinct notes, supporting documents, and data to include: a completed objective assessment that indicates the rationale for requesting the training at a higher level than the training limit; the reason the program was selected and how it is directly linked to employment opportunities in the local area based on the WIB priority industry sectors; and finally the reason why the participant is unable to obtain funding assistance from other sources to pay for the additional training costs.

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

This policy is posted on the WIB website located at: www.montereycountywib.org/policies/