

# GL Attachment M – Local Area Individual Training Account

## Individual Training Accounts Policy

### I. Individual Training Account Defined:

The Individual Training Account (ITA) is a payment agreement established on behalf of a participant with a training provider. The ITA is used to authorize expenditure of WIOA funds for training services for adults and dislocated workers provided by Eligible Training Providers selected in consultation with the case manager. ITAs authorize payment of training costs only for demand occupations as defined by the Board in the local area plan.

### II. Eligibility for the ITA

ITAs are limited to adults and dislocated workers that:

- Are unable to obtain grant assistance from other sources to pay the costs of their training, or
- Require assistance beyond that available under grant assistance from other sources to pay the costs of such training, and
- Complete an assessment of their skills, abilities, aptitudes and support service needs, and
- Participate in developing their Individual Employment Plan, and
- Select training from the Eligible Training Provider list, and
- Select training for occupations in demand in the local area or in an area in which they are willing to relocate.
- ITAs for out-of-school youth, ages 18-24 are allowable when appropriate to enhance individual participant choice in their education and training plans and provide flexibility to service providers.

All adults and dislocated workers are provided with information on the use of the ITA for training. This information is provided during the assessment and Individual Employment Plan development. Information on accessing the Eligible Training Provider list on the NDOL website is also provided at this time.

### III. Exceptions to ITA'S

Exceptions to the use of the Individual Training Account are for training provided through

- a. on-the-job-training,
- b. customized training
- c. incumbent worker training, or
- d. transitional employment
- e. job training offered by a community based organization or private organization to serve special populations\*
- f. If the WDB determines that there is an insufficient number of eligible providers in the local area.

\*Special Populations are defined as:

- Individuals with substantial language or cultural barriers;
- Offenders;
- Homeless individuals;
- Other hard to serve populations as defined by the Governor.

#### **IV. ITAs and Demand Occupations**

Training funded with ITAs must be for demand occupations and must be selected from the statewide Eligible Training Provider list. Data from NEworks, the Nebraska Department of Labor-Office of Labor Market Information, employer surveys, Board members' input, and data from organizations such as the UNL-Bureau of Business research, Lincoln Chamber of Commerce, and the Lincoln Partnership for Economic Development is reviewed continually to identify demand occupations in the local area. Demand information is also collected on a regional and national basis.

#### **V. Determining ITA Amounts and Duration**

Individual Training Accounts amounts are determined based on the results of Comprehensive Assessment and the development of the Individual Employment Plan for customers that need training. A financial needs assessment is conducted as a part of the Comprehensive Assessment. The maximum amount of the ITA is \$10,000. The Individual Training Account amount is determined by calculating the individual's resources, any financial aid the individual is eligible to receive, the estimated costs to be incurred by the individual while in training, including the cost of training, and determining if the individual is able to finance the training. WIOA funds are authorized based on the individual's inability to fund the training costs. (School loans are not included in the individual's resources nor are they required as a condition of receipt of an ITA). Individual Training Accounts can only be used to pay tuition, fees, books and supplies for training. Individual Training Accounts are authorized based on the assessed needs of the individual for a maximum of two years of training on a full time equivalent basis. Based on the needs of the individual, the Program Manager can approve exceptions to the ITA dollar limits and length of training.

#### **VI. Coordinating WIOA Assistance with Other Sources of Funds.**

Funds for training from the Adult or Dislocated Worker program may only be used for individuals that are unable to obtain grant assistance or require assistance beyond that available from other sources to pay the costs of training. The primary source of other funds is generally PELL Grants. All individuals being considered for an ITA must apply for financial aid as a part of the ITA determination process unless it can be documented beforehand that the individual is not eligible for financial aid. The results of the financial aid application are one of the factors used to determine the amount of WIA funds needed for the ITA. Eligible Training Providers are notified of the ITA amount and make adjustments to financial aid as necessary.

#### **VII. ITAs and Registered Apprenticeships**

Registered apprenticeships automatically qualify to be on a State's eligible training provider list (ETPL). ITAs can be used to support participants in:

- a. Pre-apprenticeship training;
- b. Training tuition for a registered apprenticeship program to the training provider;

- c. Supportive services may be provided;
- d. Needs-related payments may be provided; and
- e. Work-based training options may be also used to support participants in registered apprenticeship programs.