



## NEMO WORKFORCE DEVELOPMENT BOARD

# Individual Training Account Policy

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Individual Training Accounts (ITAs) will be utilized to fund classroom and occupational skills training services. Payment will be made to the training provider to cover tuition and related education costs (books, fees, etc.) for the approved program of training.

Northeast Region supports informed choice by the customer and allows for guidance by program operators during the “consultation with the case manager” described in CFR 663.440. This guidance may include avoiding certain courses of study (based upon occupational demand, reasonable cost, or labor projections) or particular training providers (based upon reasonable cost, placement history, relevance to occupation).

**NOTE: NEMO WDB Office Utilizes the ETPS system to approve application for the NE Region and for reporting purposes. The Partner Staff use MoScores to access the approved programs in the State and Region. MoScores is also available to the public.**

### **Funds available for ITA for Adults, Dislocated Workers, and Out-of-School Youth:**

- ❖ \$7,500 maximum per participant for tuition, books, supplies, and fees.
- ❖ \$8,500 maximum per participant for tuition, books, supplies, and fees, per program year, if the field of study or training is in a sector identified by the NE Talent Development Partnership, consisting of Advanced Manufacturing/Metal and Metal Fabrication with an emphasis on welding as well as Transportation/Warehousing, Healthcare, and Agriculture.
- ❖ However, there may be exceptions. Waiver requests to exceed this limit may be submitted to the NEMO Workforce Development Board for review and approval on the [NEMO WDB Waiver Form](#).
- ❖ ITA funded amount is contingent on availability of funds and unmet financial need of the participant;

### **Individual Training Accounts for out-of-school youth (OSY) age 16-24.**

Occupational Skills Training—NEMO WDB must give priority consideration to training programs that lead to recognized postsecondary credentials that align with in-demand industry sectors or occupations in the Northeast Region, if the program meets the quality criteria described in Section 123 of WIOA. Occupational Skills Training for Out of School Youth must:

1) Be outcome-oriented and focused on an occupational goal specified in the Individual Service Strategy; and

2) Training must be of sufficient duration to impart the skills needed to meet the occupational goal.

**Individual Training Account (ITA) guidelines are as follows:**

- Participant must be a WIOA Adult, Dislocated Worker, or Out-of-School Youth with a training level enrollment.
- The Provider must be a WIOA approved provider & the specific program must be approved. The approved programs can be found on the Eligible Training Provider System (ETPS) Follow this link: [Missouri ETPS](#) or [MoScores](#);
- The case manager determines such services are necessary for the individual to obtain employment that leads to self-sufficiency;
- Need is determined by the WIOA service provider, after completion of assessment to be in need of training and has the skills and qualifications to successfully participate which will include a comprehensive assessment of work history, skills, education, career and occupational information;
- Training programs must be identified and documented as in-demand occupations as published by labor market information, or identified on the employment agreement with an employer, local want ad, internet website announcements, letter or telephone contact with employers.
- 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;
- Training may be provided while an application for a Federal Pell Grant is pending, however; if a Pell Grant is subsequently awarded, the training provider must reimburse the One-Stop Operator the WIOA funds used to underwrite the training for the amount the Pell Grant covers. Pell Grants may be used to pay for both training and education-related expenses; therefore, reimbursement will not be required for the portion of funds released to the participant for education-related expenses.
- Assessment testing must indicate that the participant has the skills and qualifications to successfully complete the selected program of training. One of the following test scores may be used:
  - 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

- Wonderlic Scholastic Exam – If a participant is unable to achieve the suggested score for their chosen occupation, a waiver request must be made to the 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
- College transcript, less than 2 years old, with a 3.0 GPA or higher; or
- Recent college placement test accepted by the approved training provider.

As required in WIOA sec. 122, only providers that are approved in the Missouri ETPS are eligible to receive training funds under WIOA title I-B. The only exemptions to this rule are:

- On-the-job training; customized training; incumbent worker training; transitional employment; or
- The circumstances described at WIOA sec. 134©(3)(G)(ii), where the Local Board determines that:
  - There are insufficient providers, or
  - There is a training services program with demonstrated effectiveness offered in the local area by a community-based organization or other private organization to serve individuals with barriers to employment, or
  - It would be most appropriate to award a contract to an institution of higher education or other eligible provider of training services in order to facilitate the training of multiple individuals in in-demand industry sectors or occupations, and such contract does not limit customer choice; or
- When the Local Board provides training services through a pay-for-performance contract.

#### **CASE MANAGEMENT**

- A printout from the ETPS system showing the program has been approved for the Northeast Region and it must be retained in the participant’s file;
- All case notes per Case Note policy must be present in the state case management system See: [Statewide Case Note Policy 02-2017](#).
- All other supporting documentation, i.e. LMI, Transcripts/Grades, Copy of Certificate or Diploma, Assessment Test Scores
- Participant must submit passing grades from the previous semester before staff processes next semester’s ITA payment voucher;
- Document the reason the participant is not PELL eligible in Case Notes in the state data management system;

- Participant and WIOA staff must complete an “[Classroom Training Award Notification Form](#)”; and
- The ITA commitment must be documented in “Case notes”. The dollar amount should not be documented in the state data management system until the ITA is paid.