

Workforce Solutions

POLICY

CATEGORY:	Skills Solutions	No.: 009.04
SUBJECT:	Accessing an Individual Training Account	
SUPERSEDES:	009.03	
EFFECTIVE:	February 2, 2015	
RATIFIED:	April 29, 2015	
REVISED:	January 16, 2015	
RESCIND:		
FUNDING:	All Funds	

POLICY

Skills Solutions customer training services may be made available through an Individual Training Account (ITA) to program customers who:

1. Have met the eligibility requirements for Skills Solutions training services, and have been determined to be unable to obtain or retain employment at the self-sufficiency wage level without such services;
2. After an interview, evaluation or assessment, and case management have been determined by the Workforce System contractor or partner, to be in need of training services and to have the skills and qualifications to successfully complete the selected training program;
3. Select a program of training that is in the Board approved targeted occupations list and that appears on the Statewide List of Eligible Training Providers, or are on the targeted occupations list for another local workforce development area to which the customer is willing to commute or relocate to; and
4. Are unable to obtain sufficient grant assistance from other sources to pay the direct training costs (i.e., tuition, fees, books) of such training, including Trade Adjustment Assistance, Federal Pell Grants, etc. or who require assistance beyond that available under grant assistance.

Program Funds for Training

WIA funds may be combined with other sources of financial assistance (e.g., Pell Grants, scholarships, severance pay, etc.) as necessary to meet training and support services costs to ensure the participant is financially capable of successfully completing the training program.

Contractor staff must determine and document the customer's:

- attempt to obtain sufficient grant assistance from other sources to pay the full costs of training;
- need for support services; and
- ability to sustain his or herself and family during training.

Contractor staff must document this information in the Texas Workforce Information System of Texas (TWIST) Counselor Notes.

Contractor must ensure that program funds are not used to pay training costs:

- for any portion or term of training for which the customer has signed a loan as part of financial aid; or
- that were paid by the customer (or other source) prior to program registration.

Customer Choice Requirements

Contractor must ensure that customer choice in the selection of an eligible training provider and training services is maximized by providing customers with:

- the Statewide List of Eligible Training Providers, with a description of approved programs and information identifying eligible providers; and
- performance and cost information related to the Eligible Training Providers.

ITA Limits

The amount of funds authorized for an ITA will be based on the training provider's cost (tuition and fees) and other required related program expenses (books, supplies, equipment, tools, uniforms) for the current program year; however, the Board will impose a limit on the aggregate amount of an ITA. An overall time limit will also be assigned to each program:

1. Maximum Amount of time allowed for the use of an ITA - two (2) program years
2. Maximum Amount of an ITA - \$9,000 (\$4,500 per program year)

Customers may select a training program that costs more than the maximum amount available for the ITA if other sources of funds are available to supplement the ITA, e.g., Pell Grants, scholarships, severance pay, etc.

Exceptions to ITAs

Exceptions to the requirement that training services are financed through ITAs include the following:

- On-the-Job training and customized training; or
- With prior approval from TWC, as determined by the Board, there is:
 - an insufficient number of Eligible Training Providers in the workforce area to make the ITA system effective; or
 - a training services program of demonstrated effectiveness offered in the workforce area by a community-based or other private organization, which serves special participant populations that face multiple barriers to employment.

Contracts with institutions of higher education and other training providers that provide for class-sized training are allowable and are not paid for through ITAs.

PROCEDURES

The Contractor will establish procedures for the provision of Individual Training Accounts in accordance with this policy and all applicable program rules and regulations. The Contractor will be responsible for training its staff and monitoring its implementation.

REFERENCES

WD Letter 24-14, Change 1
Workforce Investment Act §663.320, 663.230 and 663.400
SNAP E&T Guide Section B-108b: Vocational Training

INTENT

To ensure compliance with the above reference federal and state guidance.