

**TO: Program Planning and  
Development Committee**

**DATE: 1/29/03**

**FROM: WIB Staff**

- For Action
- For Information
- Meeting Notes

**SUBJECT: Individual Training Accounts (ITAs)**

**PROPOSED MOTION(S): For Information**

**DISCUSSION:** Currently there is a cap of \$6,000 for an Individual Training Account (ITA) that was established by the WIB on 07/09/02. Due to the economic climate and a potential decrease in funds, the WIB may want to change the maximum dollar amount for an ITA.

The ITA system was established in order to provide customer choice in the selection of training providers. Through this system, eligible Workforce Investment Act (WIA) participants are able to select their choice of training. The Merced County Workforce Investment Board, through the One-Stop Operator, the Merced County Department of Workforce Investment (WI), shall make available classroom training in occupations that are directly connected to occupations in demand, as established by the Board. Occupational classroom training will be provided through training vendors evaluated, approved and placed on the state Eligible Training Provider List (ETPL).

The Merced County Workforce Investment Board, through WI, shall provide training services that lead to a certificate/license/credential/degree or a competency or skill recognized by employers, or a training regimen that provides individuals with additional skills or competencies generally recognized by employers.

The Merced County Workforce Investment Board, through the Department of Workforce Investment, reserves the right to make exceptions to this policy, on a case-by-case basis, should individual circumstances warrant exceptions.

**ATTACHMENT(S): ITA Policy  
ITA Usage Form**

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Updated:

7/09/2002

- **Policy**
- **Individual Training Accounts (ITA's) - General Provisions**
- **Training Activities**
- **Eligibility for Training**
- **Training Priority System**
- **Limitations of Financial Support**
- **Minimum Requirements for Training**

## **I. Policy**

- A. In order to provide customer choice in the selection of training providers, the Individual Training Account (ITA) system was established. Through this system, eligible Workforce Investment Act (WIA) participants are able to select their choice of training. The Merced County Workforce Investment Board, through the One-Stop Operator, the Merced County Department of Workforce Development (WI), shall make available classroom training in occupations that are directly connected to occupations in demand, as established by the Board. Occupational classroom training will be provided through training vendors evaluated, approved and placed on the state Eligible Training Provider List (ETPL).
- B. The Merced County Workforce Investment Board, through WI, shall provide training services that leads to a certificate/license/credential/degree, a competency or skill recognized by employers, or a training regimen that provides individuals with additional skills or competencies generally recognized by employers.
- C. The Merced County Workforce Investment Board, through the Department of Workforce Development, reserves the right to make exceptions to this policy, on a case by case basis, should individual circumstances warrant exception.

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## **II. Individual Training Accounts (ITA's) - General Conditions**

- A. Except as provided in the Workforce Investment Act of 1998 and associated regulations, training services provided to eligible participants shall employ individual training accounts (ITAs) issued through the One-Stop Delivery System.

The "maximum Training Funds Available" on any individual ITA shall not exceed six-thousand dollars (\$6,000) without prior, written approval of the Assistant Director of the One-Stop Operator or in his/her absence, the Program Manager of the One-Stop Career Center

- i. In no event shall an ITA carry a time or dollar balance after the program of training is either completed or terminated.
- ii. The maximum length of training under a single ITA shall be two years.
- iii. No more than three (3) ITAs may be issued to a participant within a two-year period
- iv. An ITA shall cover the cost of training including tuition and other training-related items supplied by the training provider (e.g., books, license fees, training materials, registration fees,

supplies, uniforms, DMV printouts, physical examinations, immunizations, health fees and insurance) but will not include or consider the costs of supportive services. Supportive services, if appropriate, shall be delivered pursuant to the Board's Supportive Services Policy.

- B. Both the student and a representative of WI will sign a completed ITA. Signatory authority of WI on the ITA is the Program Manager responsible for Training Services at each of the Department's geographic locations (authorized by the Merced County Board of Supervisors on 7/25/00 and Department of Workforce Development Director on 7/25/00). Once a completed ITA is signed by the student and WI representative, copies will be provided to the Accounting/MIS unit of WI, the school/provider, the case manager and the student. Each geographic location will use the same ITA form, but will utilize Certificate Numbers unique to their location to designate point of origin. Initially, the Livingston office will issue sequentially ITA certificate numbers 1 - 999, Los Banos will issue sequentially ITA certificate numbers 1000-1999, Merced will issue sequentially ITA certificate numbers 2000-2999, and Merced CalWorks will issue sequentially ITA certificate numbers 3000-3999.
  
- C. WI shall ensure that all training activities are provided in sites that are accessible to individuals with disabilities, and that all reasonable accommodations are made to provide services to this populations.

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### **III. Training Activities**

- A. The types of training services made available through WI under the Workforce Investment Act shall include:
  - i. Occupational skills training as well as training for non-traditional employment, offered in a classroom environment;
  - ii. Skill upgrading and retraining, including training courses that build upon the individual's existing skills.
- B. Additional training services, not covered by this policy, include:
  - i. Programs that combine workplace training with related instruction, such as customized training programs;
  - ii. On-the-job training;
  - iii. Work experience;
  - iv. Entrepreneurial training;
  - v. Adult education and literacy activities.

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### **V. Eligibility For Training**

WI shall make available Workforce Investment Act funds for the provision of occupational classroom training to eligible populations in accordance with Section 134(d)(4)(A) of the Act. Eligible populations shall include adults, dislocated workers, and incumbent workers who:

- i. Are unable to obtain employment that leads to economic self-sufficiency through core and intensive services;

- ii. After an interview, evaluation or assessment, and case management, have been determined by a one-stop operator to:
  - a. be in need of training services;
  - b. have the skills and qualifications to successfully participate in the selected program;
  - c. have selected programs of training services that are directly linked to the employment opportunities in the Merced County area, central San Joaquin Valley, or in another area in which the customer is willing to relocate;
  - d. are unable to obtain sufficient grant assistance, including PELL grants;
  - e. require support beyond the assistance made available under other grant assistance programs.

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## **VI. Training Priority System**

- A. If and when the Board declares that funds allocated to a local area for adult employment and training activities under paragraph (2)(A) or (3) of section 133 (b) are limited, then WI shall provide priority services to recipients of public assistance and other low-income individuals for intensive and training services. Low-income individuals are defined as:
  - i. receives, or is a member of a family that receives, cash payments under a Federal, State, or local income-based public assistance program;
  - ii. received an income, or is a member of a family that received a total family income, for the six-month period prior to application for the program involved (exclusive of un-employment compensation, child support payments, payments described in subparagraph (A), an old-age and survivors insurance benefits received under Section 202 of the Social Security Act (42 U.S.C. 402) that, in relation to family size, does not exceed the higher of:
    - a. the poverty line, for an equivalent period; or
    - b. 70% of the lower living standard income level, for an equivalent period;
  - iii. is a member of a household that receives (or has been determined within the six-month period prior to application for the program involved to be eligible to receive) food stamps pursuant to the Food Stamp Act of 1977 (7 U.S.C. 2011 et. Seq.);
  - iv. qualifies as a homeless individual, as defined in subsections (a) and (c) of Section 103 of the Stewart B. McKinney Homeless Assistance Act (42 U.S.C. 11302);
  - v. is a foster child on behalf whom State or local government payments are made; or
  - vi. in cases permitted by regulations promulgated by the Secretary of Labor, is an individual with a disability whose own incomes meets the requirements of a program described in subparagraph (a) or of subparagraph (b), but is a member of family whose income does not meet such requirements.

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## **VII. Limitations Of Financial Support**

- A. For those clients who elect to attend occupational classroom training within the local labor market area (defined as from Fresno County to the south to Stanislaus County to the north), the maximum amount of funds available will be limited to the needs identified in the Individual Employment Plan.
- B. For those clients who elect to attend occupational classroom training outside of the defined labor market area, no supportive services will be made available to the client by the Department of Workforce Development.
- C. For those clients who must attend occupational classroom training outside of the defined local labor market area because there are no providers of the training within the area, the provisions for electing to attend within the local labor market area will apply.

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ITA Usage From 07/01/2002

Amount	# of Clients
\$0 - \$1000	1
\$1001 - \$2000	2
\$2001 - \$3000	2
\$3001 - \$4000	0
\$4001 - \$5000	21
\$5001 - \$6000	6
Over \$6000	2
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Total ITA Expenses: \$ 149,925.10

Average ITA: \$ 4,409.56

\$	6,530.00	Castaneda	Eduardo	534027	201	ITA Administrative Assistant	CT
\$	6,495.00	Wade	Dale	534027	201	ITA Welder, Combination	CTWS
\$	6,000.00	Mejia	Manuel	334118	501	ITA HVAC/R Tech./Commercial Refrig. Tech.	HVAC/R
\$	6,000.00	Hoffman	Kenneth, Jr.	234013	501	ITA Building Inspector	CLEC
\$	5,995.00	Johnson	Jeanine	334118	501	ITA Medical Billing Clerk	CTC
\$	5,800.00	Avelar	Juan	534027	501	ITA Building Maintenance	VVC
\$	5,530.00	Allen	Cynthia R.	234013	201	ITA Administrative Medical Clerk	CT
\$	5,500.00	Stanley	Brian	234086	501	ITA Building Maintenance	CSTI
\$	4,999.00	Castaneda	Ruben	034107	501	ITA Truck Driver Training	TDA
\$	4,999.00	Alonzo	Miguel	234013	201	ITA Truck Driver Training	TDA
\$	4,999.00	Coffman	Steven	334135	201	ITA Truck Driver Training	TDA
\$	4,999.00	Eikenberry	Linda A.	234086	201	ITA Truck Driver Training	TDA
\$	4,999.00	Buenrostro=Arceo	Eduardo	234013	201	ITA Truck Driver Training	TDA
\$	4,930.00	Parnell	William H.	234013	501	ITA User Support Analyst	NHCLC
\$	4,600.00	Lopez	David	534027	501	ITA Pharmacy Technician	MIT
\$	4,482.00	Cervantes	Richard	234013	501	ITA Welding & Industrial Maintenance	CVOC
\$	4,287.00	Scott	Donald	534027	201	ITA Advanced Tractor Trailer Operator	WPTS
\$	4,287.00	Arroyo	Rafael	234086	201	ITA Advanced Tractor Trailer Operator	WPTS
\$	4,287.00	Murillo	Guadalupe	234086	501	ITA Advanced Tractor Trailer Operator	WPTS
\$	4,287.00	Sparks	Lisa Faye	234086	201	ITA Advanced Tractor Trailer Operator	WPTS
\$	4,287.00	Johnson	John	234013	201	ITA Advanced Tractor Trailer Operator	WPTS
\$	4,287.00	Garza	Salvador D.	234086	501	ITA Advanced Tractor Trailer Operator	WPTS
\$	4,287.00	Cuevas	Rafael Jr.	534027	201	ITA Advanced Tractor Trailer Operator	WPTS
\$	4,287.00	Saldana	Bruce	534027	501	ITA Advanced Tractor Trailer Operator	WPTS
\$	4,287.00	Arredondo	David	234086	501	ITA Advanced Tractor Trailer Operator	WPTS
\$	4,215.00	Bennett	Walter M.	234086	201	ITA Computer Maintenance & Repair	MCOE
\$	4,152.00	Gutierrez	Alfonso L.	234086	501	ITA Advanced Tractor Trailer Operator	WPTS
\$	4,122.00	Saepanh	Ou Wang	534027	501	ITA Advanced Tractor Trailer Operator	WPTS
\$	4,058.00	Cortez	Celsa	234013	201	ITA Advanced Tractor Trailer Operator	WPTS
\$	2,880.00	Valencia	Moises	234013	501	ITA Accounting	MCOE
\$	2,142.00	Sanchez	Alejandra	334181	501	ITA Accounting	HC
\$	1,631.10	Montes	Eurolia	234086	201	ITA Vocational Nursing	CAE
\$	1,285.00	Beckerdite	Shirley A.	234013	201	ITA Physical Therapy Aide	AC
\$	-	Lemons, Jr.	Doyle M.	234013	201	ITA Truck Driver Training	TDA

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