

**TO: Planning & Policy Development Committee**

**Date: November 28, 2001**

For Action  
 For Information  
 Meeting Notes

**FROM: WIB Staff**

**SUBJECT: Individual Training Account Policy – continuation**

**PROPOSED MOTION: N/A**

**DISCUSSION:**

**The Law** – Section 134(d)(4)(G)(ii) of the Workforce Investment Act of 1998 required that, absent specific conditions, the “normal” mode for delivery of training services shall be via Individual Training Accounts issued and administered through the One-Stop system.

**The Regulations** – 20 CFR § 663.410 describes an Individual Training Account as an account established on behalf of a participant (Adult or Dislocated Worker) and from which payments for training services are paid.

20 CFR § 663.420 allows that limits to ITA’s may be established in different ways:

- (1) There may be a limit for an individual participant that is based on the needs identified in the individual employment plan; or**
- (2) There may be a policy decision by the Local Board to establish a range of amounts and/or a maximum amount applicable to all ITA’s.**

**Limitations established by Local Board policies must be described in the Local Plan and should not be implemented in a manner that undermines the Act’s requirement that training services are provided in a manner that maximizes customer choice in the selection of an eligible training provider. Further, ITA limitations may provide for exceptions to the limitations in individual cases.**

**An individual may select training that costs more than the maximum amount available for ITAs under a local policy when other sources of funds are available to supplement the ITA. These other sources may include: Pell Grants; scholarships; severance pay; and other sources.**

**Staff Commentary -- Since the last meeting, committee staff has consulted with various members of the One-Stop Operator staff on this matter and reviewed the ITA policies of a number of other Local Workforce Investment Areas.**

**Based on the above, staff has determined that the number and complexity of issues upon which the committee must decide are beyond the scope of a simple briefing paper. Staff has therefore prepared a formal presentation which will guide the committee and facilitate its deliberation. This presentation will be delivered at the committee meeting of November 28.**

**ATTACHMENTS:**