

<b>Central Western Maine Workforce Development Board (CWMWDB) General Policies and Procedures</b>	
<b>Policy: Individual Training Accounts</b>	<b>EFFECTIVE DATE: 10/25/18</b> <i>Review Date: 10/25/20 Review/Approve 10/26/23</i>
<b>Approved by: CWMWDB BOD</b>	

**I. Background**

CWMWDB implements this policy in adherence with the federal Workforce Innovation and Opportunity Act WIOA CFR Title 20 Chapter V Part 680 Subpart B and Subpart C: training services for adults and dislocated workers that may be provided through Individual Training Accounts (ITAs). Under Sec. 129 (C) (2) (D) youth training activities are not subject to the policy governing the issuance and management of ITAs. However, under 20 CFR Sec. 681.550, ITAs may be allowed for Out of School youth aged 16-24. While In School youth are not eligible for ITAs, WIOA funding can be used for support services if they are in training. If at any time CWMWDB policy conflicts with federal or state regulations, those regulations will supersede CWMWDB policy.

**II. Who is Eligible for an ITA?**

Training services may be made available to employed and unemployed adults, dislocated workers, and out-of-school youth age 16-24. Service Provider staff must through the use of an interview, evaluation, assessment, and career planning, determine that the participant is:

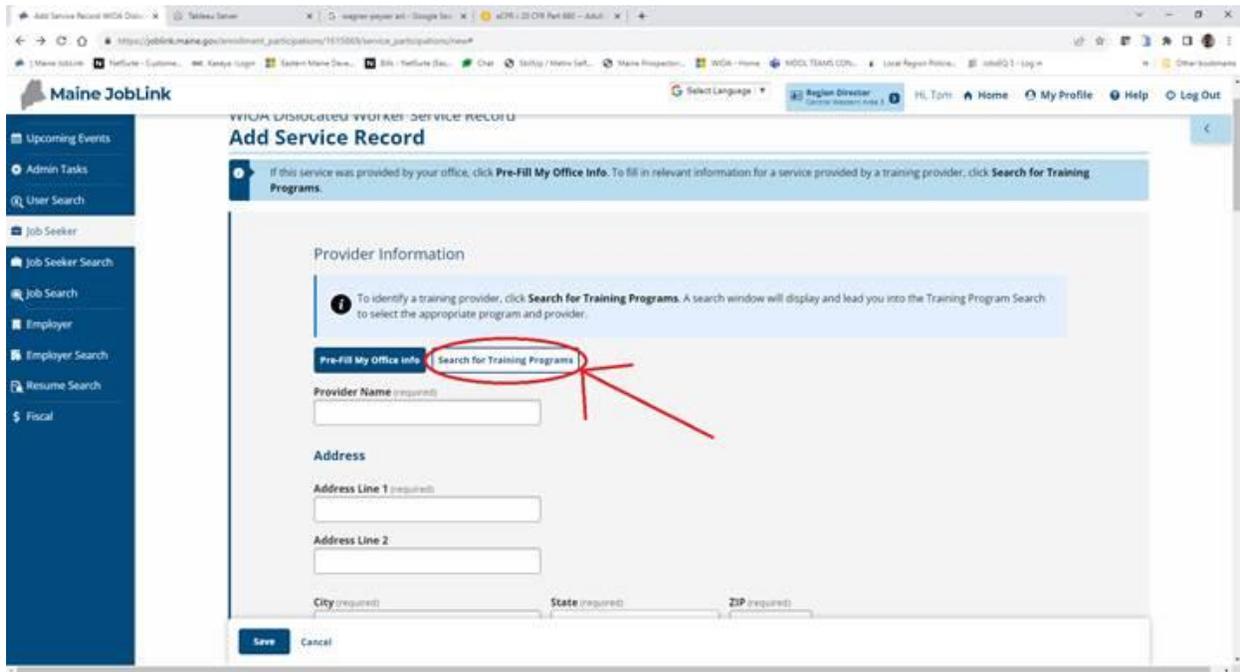
- Unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services;
- In need of training services to obtain or retain employment leading to economic self-sufficiency or wages comparable to or higher than wages from previous employment;
- If supported through the Adult program, is eligible under the priority system (recipients of public assistance, other low-income individuals, or basic skills deficient; and
- Have the skills and qualifications to participate successfully in training services.

This determination must be documented in case notes or the training plan.

**III. Training Selection**

Eligible participants must select a program of training services that is directly linked to the employment opportunities in the central western Maine region, or in another area to which the individuals are willing to commute or relocate. Staff should share labor market information of the region that includes in-demand, high wage occupations. Priority should be given to training that leads to employment within sectors mentioned in the CWMWDB Local Plan: Healthcare, Information Technology, Advanced Manufacturing & Machining, Construction & Related Trades, Retail and Service, as well as Agriculture and Ecotourism in Franklin and Somerset Counties.

Eligible participants must choose a training program that is on the Eligible Training Provider List (ETPL), which is kept current on the Maine Job Link. When in Maine Job Link, staff must populate the Service Record with the training provider by pulling the information from the ETPL.



#### **IV. Payments associated with ITAs**

WIOA assistance can support the cost of training, but other sources should be considered first: state-funded training funds such as the Maine State Grant, Trade Adjustment Assistance (TAA), TANF, Federal Pell Grants, and other institutional or community scholarships. WIOA funds can be used to fund training if the participant is unable to obtain grant assistance from other sources or requires assistance beyond what is available from other sources. Tuition, fees, and books can be funded through an ITA. These needs must be written into the Training Plan that is signed by the participant and staff.

#### **V. ITA development**

Individual Training Accounts may be written for credentials such as degrees, certificates, and occupational licenses. ITAs will be developed and supported when:

- Funds are available;
- The customer chooses an eligible training provider consistent with the Eligible Training Provider List (ETPL);
- The customer is eligible for training services based on determinants in section I;
- The customer demonstrates appropriate career choices based on work experience and occupational preferences;
- There is a reasonable expectation of completing training and a reasonable expectation of obtaining employment,

#### **VI. Payments of ITAs**

Service providers will work with the various training providers to develop appropriate payment methods. All payments must go through an authorization process with approval from the service provider manager. The service provider will not pay for a course that has been previously failed. Exceptions can be made for certain circumstances, with written approval from the CWMWDB Executive Director. Circumstances could include prolonged sickness during the training or other situations that would hinder a participant's ability to be successful.

## **VII. Limitations on ITAs**

ITA financial support may vary depending on costs associated with the training, additional customer needs, and other federal, state and community funding sources available to the participant. Providing a program title has sufficient funds, and after federal, state and community funding sources have been applied, the Central Western Maine Workforce Development Board supports a maximum financial limit of up to \$9,000 for short term training and \$12,000 for semester or mod-based training, over the entire period of a customer's enrollment, starting from the initial training enrollment date. Payments for training will observe the time frames of the training provider. For bachelor's degrees, resources will be used to fund the last two years of the program. Exceptions must have prior approval of the Service Provider Workforce Director. If a training facility operates on a semester or module schedule, staff will ensure that the participant has successfully passed the semester or module before committing to financially support additional semesters or modules. The measure of success will align with the institution's policy on the GPA that keeps the student in Good Standing. If a training facility operates single payment programs, such as truck driving or oil burner, a single payment may be made based on what the program title can afford up to \$9,000. Any exceptions to this financial limit must have prior approval of the CWMWDB Executive Director and/or designee. Exceptions could be made if the extension of funds supported the immediate completion of a program. Exceptions might be granted based on an unforeseen cost, or the loss or reduction of other resources. Exceptions will only be made after aggressive attempts are made to find additional resources.

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