

Policy: Individual Training Accounts

Effective Date: January 1, 2024

Purpose: to provide guidance regarding enrolling Workforce Innovation and Opportunity Act (WIOA) customers in an Individual Training Account (ITA).

POLICY AND PROCEDURES:

One of the funded opportunities utilized under the various Titles of WIOA is an ITA. Customers interested in training are provided an orientation by the NJ Employment Service, a Training Information Seminar (TIS), to let them know about the various training opportunities.

After that they are referred to the Intake Unit to collect information and determine eligibility for one of the WIOA Titles. If found eligible, they are referred to the testing unit and given the CASAS test. They are then called in to meet with an employment counselor to discuss their score and have an assessment completed. They then discuss their career interests and look at training opportunities on the State's Eligible Training Provider List (ETPL). The customer is then given a school research package to research training schools. The customer must meet WIOA eligibility requirements as well as the requirement of the training provider for the program that a customer desires.

As part of this process the staff:

- 1) Complete an assessment indicating a need for training that leads to self-sufficiency (or higher wages than their previous employment).
- 2) Documents this assessment by completing an Individual Employment Plan (IEP) for Adults and Dislocated Workers and an Individual Service Strategy (ISS) for Youth.
- 3) Determines that the customer is unable to obtain grant assistance from other sources to pay the costs of such training, including such sources as State-funded training funds, Trade Adjustment Assistance, and Federal Pell Grants established under title IV of the Higher Education Act of 1965, or require WIOA assistance in addition to other sources of grant assistance, including Federal Pell Grants (provisions relating to fund coordination are found at WIOA 20 CFR 680.230 and WIOA Sec. 134(c)(3)(B)).

Service providers and training providers must coordinate funds available and make funding arrangements with partner agencies so that WIOA ITA funds supplement Pell and other grant sources to pay for the cost of training. Service providers should consider all available sources of funds, excluding loans, in determining an individual's overall need for WIOA funds. Resources

such as PELL, GI Bill and other federal grants should not be included in calculations of the level of WIOA assistance until the grant has been awarded.

Participants may enroll in ITA funded training while their application for a Pell Grant is pending provided that the service provider has made arrangements with the training provider and the participant regarding the allocation of the Pell Grant, if it is subsequently awarded. If a Pell Grant is awarded, the training provider must reimburse the service provider the ITA funds used to underwrite the tuition portion of the training costs from the PELL Grant. Reimbursement is not required from the portion of the Pell Grant assistance disbursed to the participant for education-related expenses. Note: Tuition is the sum charged for instruction and does not include fees, books, supplies, equipment and other training-related expenses.

- 4) Verifies that a selected training program is on the ETPL, is in an in-demand industry/ occupation and has a Master Agreement with the Essex County Department of Economic Development, Training and Employment.

The following types of training providers are subject to the ETPL requirements in order to receive WIOA Title I Adult and Dislocated worker funds to provide training services to these participants through ITA's. ITA's may also be used for WIOA Title I Youth funds to provide training to older, out-of-school youth (ages 18-24).

- a) Institutions of higher education that provide a program of training that leads to a recognized post-secondary credential.
 - b) Apprenticeship programs registered by the USDOL Office of Registered Apprenticeship.
 - c) Public or private training providers, including joint labor-management organizations, pre-apprenticeship programs, and occupational or technical training; and
 - d) Providers of adult education and literacy activities provided in combination with occupational skills training (e.g., the I-BEST model).
- 5) 9th grade math and reading (Basic Skills Efficiency). In certain cases, the 9th grade math score may be waived at the discretion of the WIOA manager.

LIMITS

The maximum amount of WIOA funds that can be used to fund an ITA training program is \$6,500, which includes the costs of books, uniforms, supplies etc.

Customers can receive funding for one (1) occupational training in a four (4) year period. This can be waived in certain circumstances of hardships with the approval of the WIOA Manager.

ITA Complaint Procedures

Should a participant be dissatisfied with a denial of request for training, the participant may request an ITA Panel review. A participant's request for Review Panel must be made within five (5) working days of the notification of the denial of the request for training. The ITA Review Panel will only review requested training denial that is determined not to be in a demand occupation, or on issues relating to the assessment process. Not subject for review is denial based on training requests exceeding maximum limit.

The ITA Review Panel will be comprised of a vocational counselor, a WIOA supervisor, and a staff representative of the Essex County Workforce Development Board.

The ITA Review Panel must complete its review within five (5) working days of the request for review. The decision of the ITA Review Panel must be made in writing and be included in the participant's file. They must notify the participant and the Complaint Officer of a panel denial. The panel must also notify the participant of the right to request a review by the Essex County DEDTE Director within five (5) days of the notification of denial. Should the Director deny the request, an appeal can be made to the NJ Department of Labor and Workforce Development. This must be in writing, signed, dated and addressed to the Commissioner, NJ Department of Labor and Workforce Development, CN 055, Trenton, NJ 08625.