

THE MISSISSIPPI PARTNERSHIP WORKFORCE DEVELOPMENT AREA

INDIVIDUAL TRAINING ACCOUNT POLICY

Revision Date: July 1, 2017

**Mississippi Partnership
Workforce Development Board
Individual Training Account Policy**

I. SCOPE AND PURPOSE

The Workforce Innovation and Opportunity Act (WIOA) section 134(d)(3)(G) authorizes the use of Individual Training Accounts (ITAs). ITAs are to be used by customers, after consultation with a case manager, to purchase approved training programs, provided by "eligible training providers". Approved programs are those which are maintained on a statewide listing of training providers known as the "State List". Consideration must be for training programs on the statewide listing Eligible Training Provider List (ETPL) that lead to recognized postsecondary credentials that align with the Mississippi Partnership Sector Strategy Plan. This policy outlines the minimum requirements. The Mississippi Partnership Workforce Development Board (MPWDB) has established the local area ITA policy. From time to time, the Mississippi Department of Employment Security (MDES) or the local area may request and be granted waivers applicable to ITAs; those waivers may override this policy. This policy shall provide the framework for WIOA Funds utilized for ITAs.

II. REQUIREMENTS

An ITA is an account established by a WIOA Service Provider on behalf of an eligible individual. ITAs are funded with adult and dislocated worker funds as authorized under Title I of WIOA. ITAs are to be used to purchase training services that lead to recognized postsecondary credentials that align with the Mississippi Partnership Sector Strategy Plan from training providers on the statewide eligible training provider list. In order to receive an ITA, participants must follow the guidelines of the Smart Start Career Pathway as approved by the fiscal agent and the Mississippi Partnership Local Workforce Development Board.

A. At a minimum the WIOA Participant must meet the following conditions:

1. Training services may be made available to employed and unemployed adults who have met the eligibility requirements for WIOA; have received an interview, evaluation or assessment, and career planning so that the one-stop operator or partner can obtain enough information to determine eligibility; and have been determined to be unable to obtain or retain employment providing a self-sufficient wage through services.

The MPWDB has established the self-sufficient wage to be 350% of the Lower Living Standard Income Level (LLSIL) which is currently \$21.82 hourly wage or \$44,852 annual wage.

2. The WIOA Service Provider must determine and document in the individual employment plan that the individual is in need of training services and has the skills and qualifications to successfully complete the selected training program.
3. The WIOA Service Provider must determine and document in the IEP that the training selected aligns with the Mississippi Partnership Sector Strategy Plan.
4. Only after intensive counseling should a participant be given an ITA for a training program in which he anticipates a decrease from pre-program wages upon employment in that occupation.
5. The workforce development system established under WIOA emphasizes informed customer choice. In consultation with case managers, an individual who has been

determined eligible for an ITA may make an informed choice for training that aligns with the Mississippi Partnership Sector Strategy Plan from the state list of eligible providers to choose the provider from whom he/she will receive the training.

It is the intent of MPWDB that training courses offered by universities are for non-traditional students and dislocated workers.

6. The program must be directly linked to the employment opportunities in the local area based on the Mississippi Partnership Sector Strategy Plan, or in another area in which the adult or dislocated worker is willing to relocate. *Unless the program has exhausted training funds for the program year, the operator must refer the individual to the selected provider, and establish an ITA for the individual to pay for training.* Federal Regs. 680.340 (c)
7. The WIOA Service Provider staff must ensure that the training provider is included on the State Eligible Training Provider list for the particular type of training requested, and that the occupation does in fact align with the Mississippi Partnership Sector Strategy Plan.
8. Participants who are enrolled into training programs should be carefully screened to ensure that they have the necessary desire and ability to complete these programs since the area's performance standards relate to attainment of credential and retention of employment.
9. The following items are conditions the participant must meet.
 - a. The participant seeking training must agree to apply for Pell Grant or other available financial assistance aid if the training of their choice is eligible for such assistance. The case manager must take into consideration all sources of funds, excluding loans, when determining an individual's overall need for WIOA funds. When appropriate, WIOA training funds must be reimbursed through Pell Grant funds.
 - b. The participant seeking training services must certify commitment to attend classes and to complete the training.
 - c. The participant seeking individual training account services must have at a minimum a Silver Career Readiness Certificate.
 - d. The participant seeking training must agree to provide attendance information, grades and/or progress reports while enrolled in WIOA-approved training activities or agree to allow the training provider to release such information to the One-Stop operator and/or WIOA Service Provider.
 - e. If an individual is awarded an ITA, the individual must maintain a minimum 2.0 Cumulative Grade Point Average (GPA). The individual's GPA will be evaluated at the end of each semester. If the individual does not maintain a cumulative 2.0 GPA, the individual will be placed on probation and WIOA will not reimburse the training provider until the individual acquires a 2.0 cumulative GPA. An individual is only allowed two probation periods for the length of the ITA; if after two probation periods the individual does not acquire a 2.0 cumulative GPA, additional payments may not be made on behalf of this individual for the ITA.
 - f. Upon completion of training the participant must agree to provide or authorize the provision of documentation of completion of training (credential) and, when hired, provide name of employer and wage/salary information to the One-Stop operator and/or WIOA Service Provider.
 - g. The participant must agree to participate in local contact and follow-up activities to determine employment retention and wages at designated intervals.

B. Limitations on ITAs for regular WIOA Funds

1. An ITA may pay for a narrow or broad range of services, but not for services prior to the determination of need for training and selection of a training program. Tuition and fees can be funded by ITAs and the MPWDB permits ITAs to be used for equipment, tools, books, or other costs that increase the probability of successful completion of training.
2. As allowed by the WIOA, the MPWDB has established limitations on the dollar amount and duration of ITAs, as indicated in the following:
 - a. Limitations on dollar amounts –
 - i. ITAs with training length of one year or less: The maximum amount that the MPWDA will contribute towards the cost of a training program funded through an ITA with a training length of one year or less listed on the ETPL is \$1,500 per semester, with a maximum of \$3,000.
 - ii. Truck Driver Training: The maximum amount that the MPWDA will contribute towards the cost of a truck driving training is \$2,500.
 - iii. Full-Time ITAs (12 semester hours or more): The maximum amount that the MPWDA will contribute towards the cost of a training program funded through a Full-Time ITA is \$1,500 per semester, with a maximum of \$6,000.
 - iv. Part-Time ITAs (less than 12 semester hours): The maximum amount that the MPWDA will contribute towards the cost of a training program funded through a Part-Time ITA is \$1,500 with a maximum of \$6,000
 - b. Limitations on duration - The Mississippi Partnership has set the maximum duration of an ITA at twenty-four (24) months except in cases of personal hardship, in which case an ITA may last no longer than thirty-six (36) months. In no cases, however, will WIOA funding for an ITA exceed \$6,000.
 - c. Coordination of funding for training - If the cost of training as published in the State Eligible Training Provider List is more than the WIOA contribution of \$1,500 per semester, the individual participant is responsible for securing funding to make up the balance from non-WIOA resources (personal resources, Pell grants, etc.). Payment of said funds must be documented by the training provider prior to disbursement of WIOA funds.

C. Priority of Service

1. Priority of Service for Adults
 - a. In line with the area's priority of service statement that if training funds are limited for any WIOA Service Provider, priority of service will indicate that individuals enrolled in WIOA under the adult program who are economically disadvantaged will have priority over non-economically disadvantaged persons for the receipt of training funds.
 - b. A Priority of Service Rating Sheet must be completed for each individual enrolled in WIOA under the adult program who is requesting training services from the Mississippi Partnership. Scoring on this rating sheet will determine the priority that these individuals will receive in accessing training funds. If no waiting list exists, those persons who receive any points on the rating scale must immediately receive appropriate WIOA Title I career or training services.
2. Priority of Service for Dislocated Workers

Priority of service is not applicable to dislocated workers.

3. Four Year Degree Holders

To prioritize individuals who need training to ensure that they obtain a job leading to self-sufficiency, persons already having a four-year degree will have less priority than those persons who do not. However, case management will ultimately determine who does or does not receive an ITA.

D. Coordination of WIOA Training Funds

1. WIOA funding for training is limited to participants who are unable to obtain grant assistance from other sources to pay for their training or require assistance beyond that available under grant assistance from other sources available under other Federal programs. Procedures for ensuring coordination of available sources of funds are as follows:
 - a. Program operators and training providers must enter into arrangements with the entities administering the alternate sources of funds, including eligible providers administering Pell Grants.
 - b. All sources of funds, excluding loans, should be considered when determining an individual's overall need for WIOA funds.
 - c. With this information, the WIOA counselor should work with the participant to calculate the total funding resources available to ensure the participant's success in the training program.
 - d. This coordination between program operators, training providers, and the participant should ensure that duplicate payments of training costs are not made.
 - e. Participants may enroll in WIOA funded training while application for a Pell Grant is pending, as long as the WIOA Service Provider has made arrangements with the training provider and the WIOA participant regarding allocation of the Pell Grant, if it is subsequently awarded. In that case the training provider must reimburse to the WIOA Service Provider the WIOA funds used to underwrite the training for the amount the Pell Grant covers.
2. The participant seeking training must apply for all known available financial assistance and provide proof of a Pell Grant, except when the training program selected is not eligible for Pell participation. If a participant received any Pell funds, it must be applied first and if there's a balance, WIOA may pick up the remaining cost. This will allow the training provider to make adjustments based on participant needs.

If a participant is in need of a training that aligns with the Mississippi Partnership Sector Strategy Plan and not on the ETPL, an ITA maybe written for the training if the training is conducted by a post-secondary education institution. The training provider must submit an application for the training program for inclusion on the ETPL if an ITA is written for such training. All policies and procedures for ITAs shall be followed for such ITAs.

III. PROCEDURES

The Fiscal Agent shall adopt and WIOA adult, dislocated worker and NEG service providers shall comply with procedures describing how ITA services are justified, documented, and paid out.

IV. EFFECTIVE DATE

This policy is effective July 1, 2017.