

INDIVIDUAL TRAINING ACCOUNT (ITA)

Department: Office of Economic & Workforce Development

Effective Date: January 2011

Policy/Procedure #:

Supersedes July 1, 2010

Purpose

To provide guidance to OEWD funded agencies on the process of completing an ITA

Overview

Individual Training Accounts (ITAs) support the WIA ideal of customer choice around the pursuit of a career. This type of training opportunity is reserved for those individuals who cannot be placed directly due to a lack of job skills and have demonstrated through the assessment process that they have the ability and the determination to complete training successfully.

Documenting the Need For Training

Training is not for every participant. The Intensive Service Provider is responsible for justifying and documenting the participant's need for training. The first step in this process is to complete an *Intensive Services to Training Determination* form. This form is a means of documenting the following:

- A revised or updated Individual Employment Plan
- Evidence that the participant is unable to obtain or retain employment that leads to self-sufficiency through intensive services

The following documents / information must accompany the Training Determination form:

- Comprehensive Vocational /Career Assessment
- Job Search History Form
- Research on training providers and their performance appraisals
- Research of other funding sources to support the expenditure of WIA dollars (i.e.: financial aid, Pell Grant, etc.)
- Labor Market research
- Documentation of Support Service provided (if applicable)

Individual Training Accounts

If a participant is to be referred to a formal training institution or program, the Intensive Service Provider must first complete an **Individual Training Account Worksheet** and submit it to OEWD's Contract Compliance Specialist for approval. The Compliance Specialist will confirm that the training program appears on the ETPL and is good standing with OEWD. Once the training site is approved, the Intensive Services Provider will take the following steps:

- Provide the training provider with a **Training Contract Agreement** which outlines all the deliverables and expectations.
- Ensure that both the authorized training provider representative and your authorized agency representative sign and date the contract and all related forms.
- Maintain the original contract and forms and provide OEWD with copies.
- Enroll participant in WorkforceCentral (WFC) identifying training activity, training provider, program code and provider codes.
- Monitor participant's progress, attendance, etc. by checking in with both the training site and the participant periodically.
- Maintain an Individual **Training Account Log** which tracks service dates, related expenses, et.
- Track all training related payments and/or refunds
- Obtain a copy of diploma, certificate of completion or degree from the training institution for the participant's file.

Per OEWD Directive, ITA funding amounts are based on the individual needs of the customer as demonstrated in the customer's Individual Employment Plan, not to exceed \$6,000. WIA customer shall be responsible to pay training provider for any training costs in excess of \$6,000.

Eligible Training Provider List

Any training institution interested in providing services to WIA funded participants must appear on the Eligible Training Provider List (ETPL). Participants may only be referred to training providers listed on the ETPL. The ETPL for the City and county of San Francisco is administered by OEWD. The California State ETPL may be viewed by visiting www.etpl.edd.ca.gov