



**COUNTY OF SAN BERNARDINO  
Workforce Investment Board  
POLICY MANUAL**

No. 10 (R1)

ISSUE 1

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By

EFFECTIVE 9/8/08

SUBJECT

**INDIVIDUAL TRAINING ACCOUNTS**

APPROVED

*Michael J. Gallo, WIB Chairman*

**POLICY STATEMENT:**

To establish criteria on the amount and duration of Individual Training Accounts (ITAs) for employed and unemployed adults and dislocated workers in the Local Workforce Investment Area.

**PROCESS:**

**References:**

- Federal: Title 20 CFR Sec: 663.300 – 663.320 and 663.400 – 663.440
- State: SB 293 UI Code Sec 14206(h) and 14260(a)(5); WIAD06-15 and WIAD06-21
- Local: WIB Policy #8, (last revised 11-01-04)

**Background Information:**

Workforce Investment Act (“WIA”) Regulations (Section 663.310) defines WIA training services and outlines who is eligible to receive such services. Although a person may be eligible to receive training, s/he may not be eligible to receive an ITA if the occupation is not in demand in the local area or in an area where the person is willing to relocate.

WIA Regulations (Section 663.410) provides a definition for an ITA that seeks to provide maximum flexibility to State and local program operators in managing ITAs. The ITA is established on behalf of the customer. Both Adult and Dislocated workers purchase training services from eligible providers they select in consultation with the case manager.

WIA Regulations (Section 663.420) provides guidance on how Local Boards may impose limits on ITAs such as the limitations on dollar amounts and/or duration. In addition, the Regulations state that an individual may select training that costs more than the maximum amount available for ITAs under the local policy when other sources of funds are available to supplement the ITA (e.g., Pell grants, scholarships, etc.).

SB 293 amended the California Unemployment Insurance (“UI”) Code to repeal Division 8, Family Economic Security: Job Preparation and Training Services, and to amend Division 7, California Workforce Training Act, by replacing Section 14000 and adding Sections 14005 – 14530. These changes to the UI Code provide guidance and new requirements for carrying out WIA funded programs. UI Code 14206(h) requires Local Workforce Investment Boards to develop local policy on the amount and duration of Individual Training Accounts, based on the market rate for local training programs.

This policy establishes the criteria used to determine the amount and duration as listed in the Local Criteria for WIA Vocational Training and ITA section of Local WIB Policy Number Eight (8) Eligible Training Providers List (“ETPL”) Policies / Procedures Policy.

**Local Criteria for WIA Vocational Training and ITA:**

1. Annually the LWIB will commission a study of economic indicators within the County of San Bernardino to determine the occupations in demand by local employers. From this study the LWIB will establish the listing of demand occupations for the fiscal year from which WIA clients will be encouraged to use in selection of careers and/or vocational training programs.
2. WDD staff will identify WIA customers who qualify for training services and provide guidance to them in selecting an appropriate training provider and program from the ETPL that will lead them to self-sufficiency as identified by the Self-Sufficiency Standard for California.
3. Priority for vocational training must be in WIB established demand occupations in the local or regional area.

4. Training is limited to residents of this county.
5. Training must result in employment that will lead the individual to self-sufficiency.
6. Length of training period must not exceed 24 months.
7. Training exceeding \$7,500 per individual must have the prior approval of the Director.
8. Use of Pell Grants or other resources is required, if available, to offset WIA training costs.
9. With the exception of Customized, On-the-Job Training (OJT) and Special Funded training (e.g., 15% Governor's WIA Discretionary Funds), all training will be provided through a voucher payment system as an Individual Training Account (ITA), which is set up for each WIA customer, signed and accepted by the customer and the selected training provider and executed by the DWD Director, Deputy Director or his/her designee.

**Criteria that may be used to determine the amount of an Individual Training Account are:**

1. The training needs as identified in the Individual Employment Plan ("IEP") are in a demand occupation that leads to self-sufficiency.
2. An amount established by the average cost within the local area/market of a specific training program on the EPTL.
3. An amount established by the average cost of a specific training program from a locally maintained list of training courses.
4. Feed back from local business/employers on the cost of training employees in a demand occupation.
5. Local feedback from employers concerning workforce skill shortages.
6. When WIA funding is limited, the Local WIB may establish a maximum dollar amount applicable to all ITAs.

Exceptions to the ITA amount criteria:

- Exceptions to the maximum cost of an ITA may be approved by the Deputy Director and/or Director on a case by case basis.

**Criteria that may be used to determine the duration of an Individual Training Account are:**

1. The training needs as identified in the IEP are in a demand occupation that leads to self-sufficiency.
2. State of California Labor Market Information Division ("LMID") Education and Training Levels tables.
3. The total number of hours of instruction as listed by the training course for the local area market on the State ETPL.
4. Occupational training tables (e.g., Specific Vocational Preparation ["SVP"]) which list minimum and maximum training durations for industry recognized occupations (Occupational data bases and programs such as the Occupation Information Network ["O\*NET"], Dictionary of Occupational Titles ["DOT"], and Standard Occupational Classification ["SOC"]).
5. Feedback from local businesses/employers on employment needs and training program durations.
6. When WIA funding is limited, the Local WIB may establish a maximum duration applicable to all ITAs.

Exceptions to the ITA duration criteria

- ITA extensions may be granted to persons who face extreme barriers to employment (e.g., a physical or mental impairment)
- Extensions to the ITA may be granted to persons enrolled in a WIB approved demand sector or occupation training.
- Exceptions to the maximum duration of an ITA may be approved by the Deputy Director and/or Director on a case by case basis.