



Larimer County Workforce Center Policies and Procedures

Subject: Individual Training Account Policy

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Updated:

Reviewed:

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Approved by: M. Johnston

Reviewed by:

I. POLICY

A. The Larimer County Workforce Center (LCWC) provides training services to Workforce Investment Act (WIA) adult and dislocated worker customers through the use of Individual Training Accounts (ITAs) provided in the form of scholarships. It is intended that the use of ITAs will allow for training services to be provided in a manner that maximizes customer choice in the selection of an eligible provider of such services. The LCWC also assures that coordination with other grant assistance sources will occur for all WIA adult and dislocated worker customers who are enrolled in training activities.

II. SCOPE OF POLICY

A. Addresses, with limited exceptions, all training services provided to WIA adults and dislocated workers.

III. DEPARTMENTS AFFECTED

A. WIA Career Transition program

IV. REFERENCES

A. The Workforce Investment Act of 1998 and the Colorado One-Stop System Policy Guidance Letter #00-15-WIA1

V. DEFINITIONS

A. N/A

VI. APPLICABLE FORMS

- A. Career Transition Program Scholarship Application
- B. Release of Financial Aid/Training Information form
- C. Individual Training Account Training Invoice
- D. Scholarship Agreement

VII. PROCEDURES

A. In an effort to increase the likelihood of successful training completion, and the necessity to meet and/or exceed WIA Common Performance Measure outcomes, each prospective WIA Career

Transition Team customer interested in receiving an ITA must demonstrate the following requirements:

1. Ability to demonstrate a 9th grade reading level and 6th grade math level through a locally provided assessment

-OR-

2. Possess a minimum of 60 documented credit hours at a post-secondary education institution

a) Upon the above demonstration, the following procedure will occur:

B. The LCWC WIA Career Transition Team will use the Scholarship Application's Training Curriculum and Expense Worksheet to demonstrate the coordination of Federal, State, and local resources that will be utilized to meet the training related costs of the customer. The Training Curriculum and Expense Worksheet will be reviewed at every ITA disbursement interval and will identify what non-WIA resources were explored prior to accessing WIA funds.

C. The LCWC WIA Career Transition program counselors will use the Training Curriculum and Expense Worksheet to record the customer's training-related financial needs and to document the mix of funding assistance received.

D. The LCWC has developed a Release of Information form to authorize the release of a WIA customer's financial aid information. This procedure ensures that coordination will occur when there is a mix of funds used to pay for a customer's training costs.

E. The LCWC assures that WIA customers who participate in training services will not be required to apply for or access student loans or incur personal debt. If a WIA customer chooses to access student loans or incur personal debt, counseling on the topic of indebtedness will be provided by the WIA counselor. This counseling shall include information on the responsibilities of indebtedness and loan repayment.

F. LCWC customers will receive assessment, counseling and the development of an Individual Employment Plan through intensive services prior to the selection of a training program. The LCWC Career Transition Team has developed a scholarship award procedure for customers to access ITAs. This procedure ensures that training programs meet the needs of both potential employers and job seekers.

G. The LCWC assures that all WIA customers will have access to the list of eligible training providers in accordance with WIA law. When the need for training becomes apparent for these customers they will be informed of this list by their WIA counselor. This will generally be after the completion of core and intensive services that do not result in obtaining employment to a level that would allow for their exit from the program. All LCWC WIA counselors will have access to the statewide eligible training provider list by accessing the Colorado Navigator website via their desktop computers. Additionally, WIA customers can access this information through home personal computers, community based computer labs, and at the LCWC resource centers.

H. All WIA customers who are interested in training will complete a Career Transition Program Scholarship Application. Applications will be reviewed by the Career Transition Team prior to the commencement of fall, spring, and summer semesters. If a scholarship application requires team review outside of these timeframes, it may also be reviewed via email or at team meetings. All scholarships require the final approval by the WIA Center Manager.

I. The LCWC shall issue Individual Training Accounts/scholarships with a Training Invoice. This invoice will commit funds in semester/quarterly increments for training to include tuition, books and fees and must be authorized by the WIA counselor. This document will also serve as the billing vehicle for the training institution.

1. Funding limitations for ITAs shall be determined by the LCWC Career Transition Team and will be reviewed a minimum of two times per year. The amount of an individual WIA customer's ITA will not exceed the current ITA standard established by the WIA Career

Transition Team, nor will the ITA amount exceed the cost of tuition, books, fees, and supplies.

2. Every attempt will be made by the WIA Career Transition Team to honor the scholarship awards made to customers. There may be instances, however, where the financial commitments to WIA customers cannot be kept, such as significant reductions in Federal, State, or local funding. In this event, the WIA counselor will work closely with the customer to identify other available financial resources to assist in the successful completion of their training.

J. If a WIA customer's financial need exceeds that of the current ITA standard, supportive services, which are directly tied to the customer's training plan, may be accessed by following the WIA Career Transition program's supportive services policy.

K. Prior to any scholarship disbursement, the WIA customer will read and sign the Career Transition Program Scholarship Agreement. This agreement outlines the expectations associated with the customer accepting a scholarship from the WIA Career Transition Program.

L. The LCWC ITA system will be monitored a minimum of two times per year. This monitoring will consist of a random sample of up to 10% of WIA files and shall ensure compliance with the procedures identified under this policy.

M. Limited Exceptions to the use of ITA's:

1. The Larimer County Workforce Investment Board has determined that situations may arise where WIA customers will desire to attend training that meets the needs of the local labor market but has not been approved through the eligible training provider list system. When this occurs, and it can be determined that appropriate eligible training providers do not exist in the local area to accomplish the purposes of the system of ITAs, exceptions may be granted with the approval of the WIA Center Manager.

VIII. RESPONSIBLE PARTY

A. Joni Friedman, Workforce Center Director or her designee.