

Policy for the Issuance of Individual Training Accounts (ITAs)

I. INTRODUCTION

In accordance with the purpose of the Workforce Innovation and Opportunity Act (WIOA), the Local Workforce Development Area establishes its Public Policy to provide guidelines and govern services delivered through Individual Training Accounts (ITAs).

Individual Training Accounts (ITAs) are key mechanisms used to deliver training services. The primary purpose of an ITA is to ensure participant empowerment, as conferred by law, allowing eligible participants to select their preferred training program. Furthermore, the law grants Local Workforce Development Boards flexibility regarding the management of ITAs, including duration, funding limits per account, and exceptions. These parameters may not be used to establish arbitrary limits that exclude eligible training service providers. An ITA represents a financial commitment established with a training provider on behalf of a participant.

II. LEGAL AUTHORITY

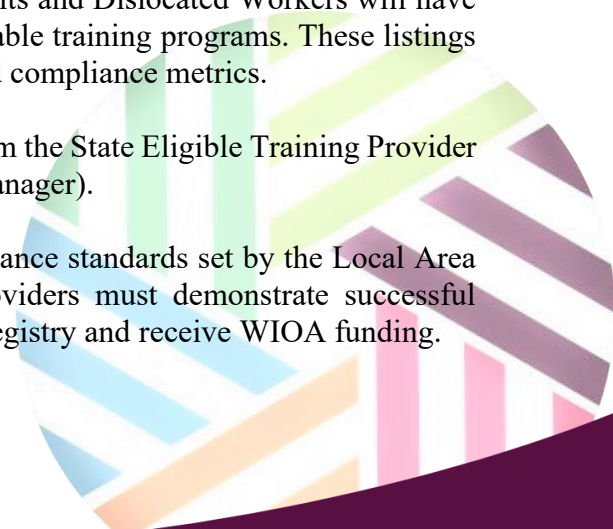
- **Section 134(c)(3)(F)(iii)** of the Workforce Innovation and Opportunity Act (WIOA).
- **20 CFR §§ 680.100, 680.300, 680.310, 680.320, and 681.550** (WIOA Final Regulations).
- **Training and Employment Guidance Letter (TEGL) No. 3-15**, issued by the Employment and Training Administration (ETA) of the U.S. Department of Labor on July 1, 2015.

III. POLICY FOR THE ISSUANCE OF ITAs

A. Through the American Job Center (One-Stop) System, Adults and Dislocated Workers will have access to the Eligible Training Provider List (ETPL) and available training programs. These listings include information regarding program costs, performance, and compliance metrics.

B. Adults and Dislocated Workers select a training provider from the State Eligible Training Provider List (ETPL) in consultation with their Career Planner (Case Manager).

C. Training providers and their programs must satisfy performance standards set by the Local Area and the Workforce Development Program (PDL/WDP). Providers must demonstrate successful performance outcomes to maintain eligibility on the provider registry and receive WIOA funding.



D. The maximum duration of an ITA shall not exceed twenty-four (24) months, unless otherwise justified and established within the Individual Employment Plan (IEP/Individual Service Strategy). Prior to the start of extended services, final approval must be granted by the Executive Director of the Local Workforce Development Area (LWDA). The Executive Director reserves the right to request additional information beyond the service strategy and interview both the Career Planner and the participant.

E. The maximum cost of an ITA shall not exceed \$10,000.00 in WIOA funding per participant. In exceptional cases where costs exceed this cap, final approval must be granted by the Local Board under the same conditions outlined in subsection D. Additionally, all possibilities for combining funds with Federal Pell Grants or other available financial aid must be exhausted.

F. If a participant has completed two years toward a bachelor's degree, an ITA may be issued to complete the final two (2) years of study. The Career Planner will evaluate factors that previously prevented degree completion as part of the assessment process. The participant must submit academic transcripts and a certificate of no debt for study periods not subsidized under WIOA. The progress report or academic transcript (demonstrating satisfactory academic progress and total credits earned) will be decisive in ITA approval, subject to fund availability.

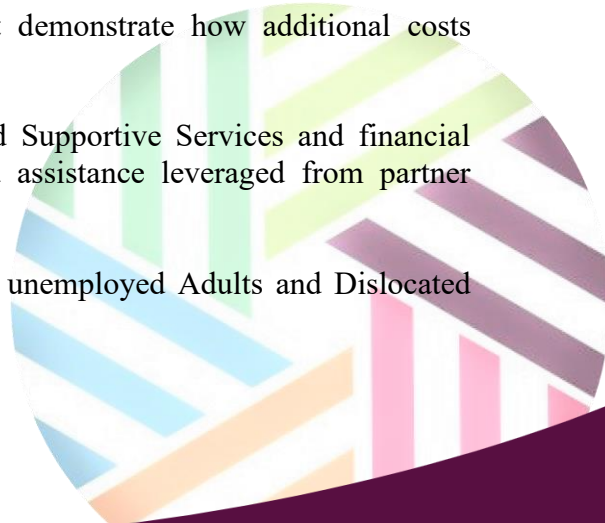
G. Any participant in default or owing a federal government debt may be considered for funding under the bachelor's degree provisions of subsection F, provided they present documentation showing Pell Grant denial and the potential for alternative aid.

H. Co-funding and leverage of funds from mandatory partners or other assistance (such as federal, legislative, or institutional scholarships) must be documented to prevent double payment for the same training services via the ITA.

I. If a participant selects a Service Provider in another locality in Puerto Rico, the training must correspond to an in-demand occupation within the Mayagüez–Las Marías Local Area or in the local area where the participant will study. The participant must demonstrate how additional costs exceeding the LWDA's ITA limit will be covered.

J. In addition to training costs, participants will be provided Supportive Services and financial incentives based on individual needs, fund availability, and assistance leveraged from partner programs or system partners.

K. Training services shall be made available to employed or unemployed Adults and Dislocated Workers who:



1. Following an interview, evaluation, and career planning process, are determined to be:
 - i. Unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or yields wages comparable to or higher than previous employment through career services alone;
 - ii. In need of training services to obtain or retain employment leading to economic self-sufficiency or higher wages;
 - iii. Possessed of the skills and qualifications necessary to successfully participate in training services;
 - iv. Selecting a training program directly linked to employment opportunities in the local area, economic region, or another area to which the participant is willing to relocate;
 - v. Unable to obtain financial assistance from other sources to cover training costs; and
 - vi. Compliant with statutory priority requirements under WIOA Section 134(c)(3) if services are funded through the Adult Program.

L. Occupational Skills Training under the Youth Program shall be provided via ITAs for eligible Out-of-School Youth aged 16 to 24. Training programs must be selected from the State Eligible Training Provider List in consultation between the youth and their Career Planner.

M. Training services shall be delivered through ITAs, with the exception of the following conditions:

1. Specific training mechanisms, including:
 - i. On-the-Job Training (OJT)
 - ii. Incumbent Worker Training
 - iii. Customized Training
 - iv. Transitional Jobs
2. When there are an insufficient number of eligible training providers in the local area to accomplish the purpose of the ITA system.
3. When a training program of demonstrated effectiveness is offered by a community-based organization or private organization serving individuals with barriers to employment.
4. When it is determined most appropriate to award a contract to an institution of higher education or other eligible training provider to train multiple individuals in in-demand sectors or occupations (provided such contracts do not restrict participant choice).
5. When operating under a pay-for-performance contract structure.

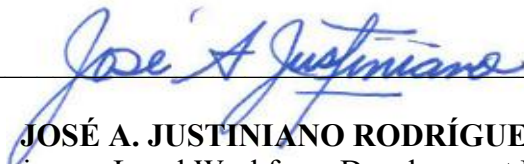


IV. PROCEDURE

The Mayagüez–Las Marías Consortium, as administrator of Title I-B funds, is delegated the authority to establish operational procedures for issuing ITAs in full compliance with WIOA laws and regulations.

V. APPROVAL AND EFFECTIVE DATE

This policy shall take effect immediately upon its approval. The Executive Director is responsible for informing all staff within five (5) business days following its adoption.


JOSÉ A. JUSTINIANO RODRÍGUEZ
Chairman, Local Workforce Development Board

March 19th, 2024
DATE

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