



## Workforce Development Board

Bringing Jobs & People Together

1000 Coffeen Street  
Watertown, New York 13601

A proud partner of the American Job Center network

Phone: (315) 786-3651

Fax: (315) 786-3679

### Individual Training Accounts Policy (Includes CRTs, OJTs & Apprenticeships)

#### ITA Justification

Employment and Training staff determines, after an interview, evaluation, or assessment, and career planning if the customer is:

- a. Unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services;
- b. In need of training services to obtain or retain employment leading to economic self-sufficiency or wages comparable to or higher than wages from previous employment; and
- c. Has the skills and qualifications to participate successfully in training services; Customers must select approved training services from eligible training providers.

If it is determined that the customer meets the above requirements, then the ITA is considered justified. E&T staff will notate that justification in the customer's file in OSOS.

#### Income Criteria

Students attending a degree granting program and still being claimed on their parent(s) or guardian(s) income tax return must meet the federal poverty guidelines to be eligible for an ITA under Local Adult funding.

#### ITA Approval Authority

Employment and Training staff charged with running WIOA training programs are authorized to develop and submit ITAs for funding approval. The funding approval is contingent upon the availability of training funds in the local area, except for Trade Act certified customers who will follow applicable regulations as outlined in the Trade Adjustment Assistance (TAA) Act of 1974 and TAA Reform Act of 2002.

#### ITA Cap and Allowable Costs

The ITA cap is as set by the WDB and is per participant. Individuals must seek other funding sources first before WIOA funds are applied. Allowable costs will include tuition, mandatory fees, and items required to participate in each specific training program.

The ITA cap and allowable costs do not apply to Trade Act certified customers, who will follow applicable regulations as outlined in TAA Act of 1974 and TAA Reform Act of 2002.

#### Funding Sources

For WIOA Adult, Dislocated worker and Youth programs other funding sources include, but are not limited to: Pell Grants, TAP, scholarships and MyCAA. All WIOA funds paid to a training provider must be reimbursed if PELL or other funds are made available subsequent to expenditure of WIOA training funds per WIOA Sec. 134(c)(3)(B)(ii). The following statement appears on the contract signed by the training provider.

“Total cost payable to the facility will be adjusted by the individual's TAP, PELL &/or MyCAA grants & only the balance will be paid by the County WIOA Office.”

Trade Act (TAA) does not require that other funding sources are expended first due to the nature of this

specific program. In the case of TAA, WIOA funding will be utilized first and then other funding will be applied. The following statement appears on the contract signed by the training provider.

“Total cost payable to the facility will include tuition, mandatory fees, and incidentals as allowed by TAA. Per Trade Act Rules and Regulations, costs of attendance cannot be reduced by Pell Grants and other Federal student financial assistance.”

### **ITA Timeframe**

The maximum time frame for CRT allowed by current local policy is two years. The maximum time frame for Apprenticeship follows each apprenticeship training program length as set by the NYS DOL Apprenticeship and Training Council. The Jefferson-Lewis Workforce Development Board (WDB) will not fund graduate degrees.

The allowable time frame does not apply to Trade Act certified customers, who will follow applicable regulations as outlined in TAA Act of 1974 and TAA Reform Act of 2002.

### **Career Ladders**

The Jefferson-Lewis WDB understands the importance of career ladders for our customers. A customer who has utilized funding for training and then wishes to move to the next step in that career field, would be favorably considered for funding as long as the combined funding costs do not exceed the ITA cap as set by the WDB in one program year.

### **Self-Sufficiency Standard**

The Self-Sufficiency standard for Adult customers will follow the amount as set and updated by the WDB as needed.

### **Demand Occupations**

In-demand occupations are subject to frequent change. Very favorable occupations are seen as being in demand as long as there are more than 10 yearly openings. Refer to the NYSDOL in-demand occupations list for current data at: <https://dol.ny.gov/jobs-demand-today>.

### **Training Programs That Address Skills Needed for In-Demand Occupations**

Priority consideration is given to training programs that lead to NYS recognized post-secondary credentials that are aligned with in-demand industry sectors and/or occupations in our local area.

### **Availability of Funding**

Employment and Training staff maintain balance sheets at both locations for WIOA-related funding streams. Funding will be provided following Priority of Service rules and regulations until such funding has been exhausted.