

**Mendocino County Workforce Investment Board**  
631 S. Orchard Ave., Ukiah, CA 95482 (707) 463-6389/Fax (707) 463-6392

**INDIVIDUAL TRAINING ACCOUNT (ITA)**

**Policy No. 11A**

**PURPOSE:**

To describe the Local Workforce Investment Area (LWIA) policy and procedure for providing Individual Training Accounts, including any Local Board approved exceptions that apply to the financing of training services:

**BACKGROUND:**

The Individual Training Account (ITA) is established for eligible individuals to finance training services. WIA Title I adult and dislocated workers purchase training services from eligible providers they select in consultation with the case manager

**REFERENCES:**

- Title 20 Code of Federal Regulations (CFR) Sections 663.400, 663.410, 663.420, and 663.430
- EDD Draft Directive WSDD-2

**GENERAL POLICY:**

1. WIA funding for training is limited to customers who are unable to obtain grant assistance from other sources to pay the cost of training or require assistance beyond that available under grant assistance for other sources to pay the costs of such training.
2. ITA funding amounts and duration are based on the individual needs of the customer as demonstrated in the customer's Individual Employment Plan.
  - a. A Cost Analysis of Eligible Training Providers to determine local market rate must be completed for all requests for ITA's exceeding \$2,000 for a given training activity. The total training shall not exceed \$10,000 without request in writing and receiving authorization from the Administrative Office.
  - b. Maximum training time shall not exceed 5 years without request in writing and receiving authorization from the Administrative Office.
3. Payments from ITA's are requested using the WIA form, Request & Authorization for ITA and Support Services.

4. When the services provided are on-the-job training (OJT), contracts for services may be used instead of ITA's.

<b>Title</b>	<b>Individual Training Account (ITA)</b>		
<b>Policy Number</b>	<b>11</b>	<b>Revision Number</b>	<b>11A</b>
<b>Effective Date</b>	<b>8/8/2001</b>	<b>Revision Date</b>	
<b>References</b>			
<b>Key Words</b>			
<b>Author</b>	<b>Amendment A Laura Stebbins</b>		
<b>Section(s) Amended</b>	<b>General Policy #2 – added sub-paragraphs “a” and “b”</b>		
<b>Adopted Comm.</b>	<b>Executive Committee</b>	<b>Date:</b>	<b>9/21/2007</b>
<b>Adopted WIB</b>	<b>10/16/2007</b>	<b>Attest:</b>	<b>Laura Stebbins</b>