

PROCEDURE TO AWARD INDIVIDUALIZED TRAINING ACCOUNTS (ITAs)

I. INTRODUCTION

The Individualized Training Accounts (ITAs, for its English acronym) are key tools that are used to provide training services. An individual that is interested in receiving training services, and is illegible, in consultation with the Career Planner can select a training service provider from the State List of Training Services Providers. The individual receives orientation to visit the educational institution and, if accepted, an economic agreement is reached with the eligible training provider on behalf of the participant.

The ITAs are an economic agreement established with a training provider to offer service to one or more participants.

II. PURPOSE

The purpose of this procedure is to establish uniform processes and instructions in relation to the award of the Individualized Training Accounts (ITAs, for its English acronym).

1. These services are available for youths of the out-of-school category, employed or unemployed adults and dislocated workers that:
 - a. After an interview, evaluation, and career planning:
 - i. It is unlikely or they cannot obtain or retain an employment that allows them to be financially self-sufficient or to receive salaries comparable or higher than what they received through the offering of the career services.
 - ii. They are in need of training services to obtain or retain an employment that leads them to be financially self-sufficient or receive salaries comparable or higher than what they used to receive in their previous employment.
 - iii. They have the aptitudes and qualifications to successfully participate in the training services.

- iv. They select a training program that is directly linked to the employment opportunities in the local area or economic region or in other area in which the participant is ready to be relocated.
 - v. They are unable to obtain financial aid from other sources to pay for the training cost.
 - vi. If the training services are offered with funds of the Adult Program, the priorities will be met, as established in Section 134 (c) (3) (E) of WIOA.
2. The Occupational Skills Development element corresponding to the Youth Program will be offered through the ITAs modality, as applicable according to eligibility (16-24 years old out-of-school eligible youth).
3. For the effective administration of the services, this activity can be provided through a group contract, provided that more than one participant freely and voluntarily selects a training program, and the dates and requirements coincide with the beginning of the academic calendar.

III. FORMS

- A. Certification of Orientation about Eligible Providers
- B. Referral to the Educational Institution
- C. Acceptance of Institution Referral
- D. Certification of Ferpa Law Compliance
- E. Certification of Participant's Responsibility and Commitment
- F. Checkup Form for Certification and Referral for Approval
- G. Checkup of Documents for Approval
- H. Certification of Proposal Recommendation and Approval
- I. Educational Bulletin
- J. Request of Budget Allocation
- K. Invoices Certification

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IV. LEGAL BASE

- Section 134 (c) (3) (F) (iii) - The Workforce Innovation and Opportunity Act (WIOA, for its English acronym)
- The Regulation of the Workforce Innovation and Opportunity Act (WIOA, for its English acronym), CFR 20 Subpart A, Section 680.100, Subpart C, Sections 680.300, 680.310, 680.320, Subpart C, Section 681.550
- TEGL 19-16 – issued by the Employment and Training Program, ascribed to the Federal Labor Department on March 1, 2017
- Public Policy, issued by the Local Board on January 22, 2019

V. DEFINITIONS

1. Individualized Training Account – It is an economic agreement made with an eligible training provider on behalf of a participant to offer services to one or more participants.
2. Local Labor Development Board – It is the ruling organism that oversees and develops public policy in regard to the labor development system.
3. State List of Training Services Providers – It is the list approved by the Labor Development Program, in which the eligible training service providers are included, as recommended by the Local Boards.
4. Career Planner – It is the official responsible of providing services, with a participant-centered approach, which are designed to prepare and coordinate comprehensive employment plans in order to make sure that participants have access to the activities inherent to the workforce development. Their purpose is to facilitate access to jobs, career education and counselling, as appropriate, during their participation in the programs and after they have been placed in a nonsubsidized job.

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5. Title 1-B Service Provider – It is the office responsible of planning, coordinating and/or providing the Individualized Career Services and the Training Services inherent to the Adult and Dislocated Worker Program, as well as the services related to the Youth Program.
6. Service Specialist – It the official to whom is delegated the responsibility of conducting the functions related to the Individualized Training Accounts of the Southeast Local Area.

VI. GENERAL NORMS

1. Through the One-Stop Center System the out-of-school youth, adult and dislocated workers will have access to the eligible training service provider lists. In consultation with the Career Planner, they select the training provider from the State List of Training Services Providers.
2. The training service providers and their programs will have to comply with the performance standards established by the Local Area.
3. It is stipulated that an ITA duration will not exceed the time and/or credits established in the providers' register.
4. The WIOA contribution will not exceed \$10,000.00 per participant. In particular cases in which the cost is higher than the set limit, the final approval of the service will correspond to the Local Board or the representative that said entity delegates to. In addition to that, every possibility of funds paired with Pell Grants or other available financial aids must have been depleted.
5. The Local Board or the representative delegated by the Board could approve up to a maximum of \$18,000.00 per participant.
6. The factors that did not allow a participant to complete the study program could be considered. If the participant shows interest and complies with the requirements, an ITA could be awarded, be it a group or individual one, so that the participant complete the study program.
7. Every participant that is in default or at fault with the federal government due to debt could be considered taking into consideration what is established in the public policy.

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8. The Local Board could approve the following exceptions after evaluating the request that must be presented by the Title I-B Service Provider. To this end, the latter must present data, statistics, metrics, or others that justify the request to exempt the use of the Individualized Training Accounts modality in the following circumstances:
 - a. When there is an insufficient number of eligible training providers in the local area to meet the purpose of the Individualized Training Accounts.
 - b. When there is a training program of shown efficacy offered by a community-based organization or a private organization that serves individuals who face employment barriers.
 - c. When it is a pay-for-performance contract.

VII. PROCEDURE

1. Upon determination of eligibility, and it has been concluded that the individual needs the training services to obtain or retain a job that allows them to be economically self-sufficient or receive salaries comparable or higher than the ones received in their previous job, the participant will be oriented in regard to the available training services.
2. If the participant is interested, and it is determined that there is need to successfully participate in the training services, the participant will be oriented and receive career counselling to document the need and interest.
3. As part of the Career Planner's functions, this official must:
 - a. Orient and give support to the participant during all the process.
 - b. Provide orientation about the providers register for the free and voluntary selection of the training program; in addition, it will be certified in the form identified to that purpose.
 - c. Conduct the case management justifying the need.
 - d. Refer the participant to Career Counselling in order to teach them to manage the tools available to these ends.

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- e. Coordinate the documentation of the *Referral for Approval of Institution* form CGU-ITA'S 001B. This form must be completed in all its parts by an authorized official from the educational institution.
 - f. Document and determine the need of support services for the participant and carry out the corresponding process.
 - g. Transfer the file to the designated specialist for the hiring process.
 - h. Visit the training site and/or educational institution as part of the services in order to make sure that the participant does not present difficulties that prevent them to complete the training program satisfactorily.
 - i. Give the necessary follow-up or the one that is determined, according to the case in order to make sure that the participant obtains a nonsubsidized job.
4. Designated Specialist's functions:
- a. Verify that the requested training is on the current State List of Training Service Providers and complies with what is established in the applicable public policies.
 - b. Prepare a certification of *Proposal Recommendation and Approval* ITA'S CGU-ITA'S-008 and refer it to the Programmatic Activities Development Manager for approval.
 - c. Give follow-up to the process for the compliance of the established starting dates.
 - d. Prepare and complete the Educational Voucher and the Budgetary Request in order to certify the funds availability and approval.
 - e. Send the Educational Voucher to the institution so that it is accepted in the training.
 - f. Refer the file to the Career Planner, and periodically send the *Academic Performance* and the Certifications of each one of the participants.
 - g. Work with the assigned contracts, including the participant's hiring, invoicing, and performance process.

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VIII. APPROVAL AND VALIDITY

This procedure was approved by the ALDLSoutheast's Local Board in a virtual meeting held on October 13, 2020. It will take effect immediately as of its approval, and it nullifies any other written communication, administrative order and/or procedure related to the award of Individualized Training Accounts, completely or partly, that is not compatible with the herein indicated. It will be the Executive Director's responsibility to inform the personnel regarding this Procedure within the five (5) days after its approval.

For the record, I sign the present public policy in Humacao, Puerto Rico, on the 13th day of the month of October of the year 2020.

[Signed]

Jesús E. Delgado Morales

Local Board President

Southeast Labor Development

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