



CWP Policy/Procedure Transmittal

Policy and Procedures Transmittal Number: 20-06

Effective Date: January 28, 2020

To: CWP Staff and Subrecipient Staff

From: Julie Watson, Compliance & Accountability Administrator

A handwritten signature in blue ink, appearing to read 'Julie Watson', is positioned to the right of the 'From:' field.

Issue Date: January 15, 2021

Subject: WIOA Adult and Dislocated Worker Individual Training Account (ITA) Policies

With this transmittal, CWP is issuing revised WIOA Adult and Dislocated Worker Individual Training Account (ITA) policies. These revised ITA policies clarified the priority of service categories for ITAs.

In addition to being attached to this transmittal, these policies can be found in CWP's online Policy and Procedures Manual, Section 3-50 WIOA Adult and Section 4-50 WIOA Dislocated Worker at <https://capitalworkforce.org/policies/>.

Questions regarding CWP's WIOA Adult and Dislocated Worker Supportive Services policies should be addressed to Shelly Henderson, CWP's One-Stop Services Manager, at SHenderson@capitalworkforce.org.

CWP Policy and Procedure Manual

Program: WIOA Adult	Section: 3-50	Page 1
Subject: Individual Training Account (ITAs)	Effective Date: 9/28/15 Rev. 1/28/20	

A. Purpose

To establish a policy and procedures for selection of entities and programs eligible to receive Workforce Innovation and Opportunity Act (WIOA) funding through Individual Training Account (ITA) scholarships to provide training to WIOA Adult program customers in the North Central Region.

B. Policy

1. Selection of Entities and Programs

Demand Occupation Requirement for Training: Capital Workforce Partners (CWP) is committed to increasing income levels and creating employment opportunities for customers in the North Central Region. CWP will assign priority to training programs for WIOA scholarship funding based on labor market demand and potential earnings.

It is CWP policy to analyze the labor market as part of its annual strategic planning process to identify labor market trends and identify occupations in demand in the local labor market. Demand occupations will have the potential for high entry wages (at least 200% of the federal poverty level) and projected growth and/or significant job openings in Connecticut and the North Central Region. Occupations will be prioritized based on the total number of jobs in the region, number of openings, and median wages. To be considered for funding through WIOA, a training program must lead to a recognized credential as defined by the U.S. Department of Labor.

WIOA customers will choose from among eligible training providers and programs listed on the State of Connecticut Eligible Training Program List (ETPL) that offer training programs in demand occupations as described in this policy. The current list of priority occupations will be provided to potential scholarship applicants.

2. Selection of ITA Recipients

It will be the policy of CWP to deliver occupational skills training for WIOA Adult program participants through the American Job Center (AJC) using, to the maximum extent possible, an ITA scholarship process. ITAs are the mechanism, under WIOA, for providing eligible customers with the resources to access training in demand occupations through WIOA approved training providers.

- a. To be eligible for an ITA, a customer must, at a minimum:
 - i. Be determined eligible for a WIOA program
 - ii. Have a high school diploma or GED; ITAs for customers concurrently enrolled in high school completion or GED programs may be approved on a case-by-case basis
 - iii. Be unable to obtain employment in the current labor market
 - iv. Complete the scholarship application process as prescribed by CWP and earn a passing score
- b. Priority of service
 - i. Residents of the North Central Region have priority of service.
 - ii. United States Veterans and eligible spouses who receive a passing score will always have priority over non-veterans for service, as defined in federal, state and CWP policy. In the event that funding is extremely limited or nearing exhaustion, after US Veterans and eligible spouses, WIOA-eligible TANF customers have the next highest priority for training, followed by WIOA Low Income Adults.

CWP Policy and Procedure Manual

Program: WIOA Adult	Section: 3-50	Page 2
Subject: Individual Training Account (ITAs)	Effective Date: 9/28/15 Rev. 1/28/20	

3. Customer choice

A customer may select any WIOA-approved education and training program in the state, as listed on the current ETPL, if he or she meets all other criteria relating to initial and subsequent eligibility for such educational and/or training services. Individuals seeking WIOA-funded assistance have the freedom of “customer choice” in selecting the training program that best fits their personal and career needs as determined through the North Central scholarship process.

4. ITA Recipient Application Process

The scholarship application process consists of a set of assessments, submission of a current resume and essay, and completion of an application package. Scholarship applications are evaluated on a scheduled basis, and are scored based on the priority ranking of the training program as determined by CWP based on labor market demand, the alignment of the applicant’s background, transferable skills, aptitudes and interests with the training program, the applicant’s awareness of the occupation and industry, and the applicant’s readiness as demonstrated by a personal and financial plan. Applicants who are veterans or eligible spouses receive additional points in the application rating process.

In all cases, the need for training, and the activities related to and including the training funded through the ITA, shall be documented in the Individual Employment Plan (IEP) in required data/case management system. The IEP includes work history, education level, assessment results, and the sequence of activities.

5. Additional Parameters for ITA Usage

- a. Generally, ITAs will be given to WIOA-approved programs currently listed on the ETPL that last not more than **12 consecutive calendar months**.
- b. Customers who have current academic credit toward associate or bachelor degree programs, which can be completed within **two consecutive semesters or less**, may request WIOA funds to complete a degree. An academic plan from the institution detailing a course schedule that will result in degree completion within two consecutive semesters must be submitted by applicants requesting WIOA funds for this purpose.
- c. In no instance will CWP fund all four years of a customer’s post-secondary education.
- d. Funding for education and training beyond the baccalaureate level is limited to certifications.
- e. Generally, funding for ITA Scholarships will not exceed \$7,500 per customer.
- f. Exceptions to the time limit and/or scholarship limit are only granted based on factors unique to the specific ITA application including application’s score, priority of the training, fund availability and fund source limitations and priorities. Exceptions to the limitations on duration and/or scholarship level for an ITA require prior approval by the CWP President/CEO or designee.

C. Procedures

1. Customer must complete the following steps when applying for an ITA scholarship:
 - a. Attend the Career Services Information Session at the *American Job Center* (AJC).
 - b. Attend the S.T.Y.L.E. Workshop at the AJC.
 - c. Conduct research into career training programs; this research will be described in the application essay.
 - d. Select a training program (the applicant must meet the basic eligibility criteria for the training program at the time of ITA application. Training program eligibility may include criteria such as prior education and/or skill levels, a clean driving record or no criminal record.
 - e. Secure a copy of the course listing for the intended training program.
 - f. Apply to the training program but **do not enroll**.

CWP Policy and Procedure Manual

Program: WIOA Adult	Section: 3-50	Page 3
Subject: Individual Training Account (ITAs)	Effective Date: 9/28/15 Rev. 1/28/20	

- g. Apply for any financial aid that is available.
- i. Have a representative of the training institution complete the Coordination of Benefits form and attach a copy of proof you applied for FAFSA (Free Application for Federal Student Aid), if applicable.
- j. Meet with a Career Agent to apply for Workforce Innovation and Opportunity Act (WIOA) certification; only individuals determined to be eligible for WIOA will be considered for a scholarship.
- k. Complete the Career Scope Assessment of Aptitudes and Interests; the summary will be attached to your application.
- l. Complete a Reading and Math Skills Assessment; a college degree may be considered as evidence of reading and math skills in some cases.
- m. Complete Individual Training Scholarship Application, including:
 - n. Individual Training Scholarship Application Form
 - o. Resume (must be typed)
 - p. Essay (must be typed)
 - q. Signed Participant Agreement
 - r. Signed Education Release Form
 - s. Course listing for training program
 - t. Submit the Application package by the deadline.
 - u. If WIOA Scholarship is awarded, applicant must schedule an appointment with a Career Agent to finalize program eligibility, funding, and program start/end dates.

2. Reviewing and Scoring ITA Applications

Once the application is completed and submitted, a panel of Workforce Development Professional staff will review and score the applications. The scoring system includes priority for Veterans and for training programs with a history of positive credentialing job placement outcomes. The passing score is 70 points.

Funding for scholarships is limited; when the volume of applications exceeds available resources, recipients will be selected based on application scores. When there are multiple applications with the highest score, preference will be given to applicants who have selected Capital Workforce Partners' high priority training programs.

CWP Policy and Procedure Manual

Program: WIOA Dislocated Worker	Section: 4-50	Page 1
Subject: Individual Training Account (ITAs)	Effective Date: 9/28/15 Rev. 1/28/20	

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