

## Individual Training Account (ITA) Forms (Training Scholarship)

To be awarded an ITA Form, a customer must have an Individual Employment Plan (IEP) that provides a rationale for their career training choices as well as support services necessary to attain their goals. The case manager or other appropriate staff is responsible for development of the IEP. A training scholarship can only be issued for certified courses published in the statewide Eligible Training Providers List (ETPL).

A customer must be enrolled in approved training 90 days from designation of the training scholarship award. A customer would be considered enrolled in training if they are:

- 1) pre-registered for classes or on a waiting list of an approved training provider;
- 2) have a starting date of training; and
- 3) the starting date is not more than one quarter or term away.

A customer must be making satisfactory progress in training to access all payments of their training scholarship. The training provider will certify if a customer is making satisfactory progress with certification signed by the registrar or an equivalent person designated by the training provider. The training scholarship will be automatically cancelled if the customer is not in a training activity within 90 days.

A customer in a training activity who does not fully access or follow through on the training scholarship may not access a training scholarship through another AJCC within the Bay Peninsula Region (San Benito, Santa Clara, NOVA and San Francisco) and nearby counties (Santa Cruz and Monterey) for a period of one year from the date of non-completion. Exceptions to this may include but not limited to:

- Career field no longer has a labor market demand
- Customer did not complete the training due to extenuating circumstances
- Training was defective

Based on an individual assessment and funds available, a training scholarship of up to \$4,000 may be awarded to eligible adults and/or dislocated workers for up to one year of training. This amount includes monies for tuition, books, fees, required training supplies necessary to successfully complete the program. In the event that the scholarship is not completely exhausted, the balance of funds may be used for supportive services.

This limit may be increased if approved by the local WDB through the case manager on a case-by-case basis. However this increased limit would not exceed the previously established maximum under WIOA training. Justification must be provided, which supports further scholarship assistance is needed, in order for the customer to obtain employment. Criteria to adjust this limit may include but not be limited to:

- Extreme hardship
- Unique training
- Labor market
- Wages at placement

Support services will be determined based on the documented needs of the customer and will not be included in the Form (scholarship) amount. The Support Services cap is \$500.

The local WDB, when awarding a training scholarship, will assume full program responsibility for the customer, even when training is provided in another WDB jurisdiction or local workforce area. This local area in which the scholarship originated will be designed as the “area of customer service” for anyone in training, thereby identifying the source of future tuition scholarship, support services, or other funding for the customer, regardless of where the training is provided.

Some customers may be eligible for PELL grants and in such cases; the amount of the tuition scholarship plus the PELL will not exceed the total cost of training. To facilitate access to PELL grants, eligibility determination may be made at an AJCC via partner staff or computer software.

Customers needing supplementary funding, such as a student loan, to complete desired training, would sign a waiver or disclosure statement indicating personal responsibility for these additional funds and acknowledgement that obtaining this supplementary funding is voluntary.

Customers interested in training outside of the Bay Peninsula Region (San Benito, Santa Clara, NOVA and San Francisco) and nearby counties (Santa Cruz and Monterey) will require management approval on a case-by-case basis.

**ITA Payment Process:**

AJCC will use a direct billing process to pay training providers. All invoices will be forwarded directly to the Fiscal Department, in accordance with AJCC payment policies.