

Attachment 20



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INDIVIDUAL TRAINING ACCOUNT POLICY (Funding Limits Policy)

ITA Limits

Many Missouri Job Center customers will participate in skill building activities; however, some of these customers will participate in formal skills training that lead to certifications, degrees, and other industry recognized credentials. Typically, these customers will have job/career goals that require a formal certification or formal skills training. Once it has been determined that the customer meets the required criteria to participate in occupational skills training activities, the advisor will meet with the customer to review the need for specific credentials or degrees that can be earned through occupational skills training. As part of this conversation, the advisor will also address specific skills that must be acquired through the formal training activity. The advisor will use available assessment results to help guide this discussion, ensuring that all certification and skill issues are addressed. The WDB has established a monetary limitation and time limitation on paid classroom training.

- 1) The limit for a participant in non-medical training is \$5,000.00 per contract year for two years.
- 2) The limit for a participant in medical related training is \$7,500.00 per contract year for two years.

Customer Choice:

Missouri's Eligible Training Provider List (ETPL) ensures the accountability, quality and labor-market relevance of programs, and ensures informed customer choice for individuals eligible for training. The list of Eligible Training Providers (ETPs) is available to all Regional WDB staff to maximize consumer choice. The selection of training services should be conducted in a manner that maximizes customer choice, is linked to in-demand occupations, is informed by the performance of relevant training providers, and is coordinated to the extent possible with other sources of assistance, including Pell Grants. While customers do have a choice when it comes to training providers and programs, they do not have a choice when it comes to funding and WIOA funds should always be used as a last resort.

Individual Training Account – Above the Max Tuition Funding

In some circumstances, it may be appropriate to consider the participant for an amount above the maximum amount listed in the Southeast Workforce Development Board Policy. These approvals are dependent on the amount of funding available in the Southeast Region's Programs. There must be a clear justification of the need for above the max approvals and the following considerations must be made. Each case is reviewed on a case-by-case basis.

- In Demand Grade of Occupation and likelihood to get and retain a job in that field.
- Supportive Service needs that may arise during training. Since tuition is looked at as the full cost including supportive services, we need to take into consideration those needs for participants and the availability of other resources/funding.
- PELL grants accepted and/or award amount.
- Necessity of taking out loans to cover the remaining portion of training costs.
- Participation of the participant in the program and the likelihood of successfully completing the training.
- Opportunities for Dual Enrollment/Braiding Funds.

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The justification for this approval should be case noted by the program staff. SEWDB Program Management will submit participants they are recommending for above the max approval to the Compliance Department for system documentation.

Please note: Cosmetology related training is not an occupation that would not be approved for above the max tuition assistance. The cap on any cosmetology related training will remain at the \$5,000 policy limit.

For more information, please see the Southeast Workforce Development Board Training and Tuition Policy (Training Expenditure Rate/Local Criteria for Training Recipients) and the Eligibility Policy – Individualized Career Services.



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Eligibility Policy – Individualized Career Services

Individualized career services must be provided to participants after Job Center staff has determined such services are required to retain or obtain employment, consistent with any applicable statutory priorities. This policy covers all Southeast Workforce Development Board programs unless otherwise noted within the program scope. This policy is in addition to any federal, state, or local guidance and regulations.

Participants are offered Basic Career Services before determining the need for Individual Career Services. Basic Career Services include: eligibility determinations, initial skill assessments, labor exchange services, provision of information on programs and services, and program referrals. Individual Career Services can include but are not limited to: Specialized Assessments, development of an Individual Employment Plan, Financial Literacy, Counseling, Short Term Pre-Vocational Services, Work Experience, WIOA Pre-Apprenticeship, English Language Acquisition, and Workforce Preparation services. Southeast Job Center staff members use interviews, comprehensive objective assessments, and individual employment plans to determine if individualized career services would be appropriate. Generally, these services involve significant staff time and customization to each individual's record.

Interviews are conducted with each participant being evaluated for Individualized Career Services. These interviews could have been recently completed (within 30 days) or completed on the day of progression from Basic to Individualized Services.

Job Center staff members are required to use the comprehensive objective assessment within the data system to verify the need of Individualized Career Services. This comprehensive and specialized assessments of the skill level and service needs may include diagnostic testing and use of other assessment tools as well as in-depth interviewing and evaluation to identify employment barriers and appropriate goals. The objective assessment incorporates a comprehensive evaluation of:

1. General Expectations
2. Program Expectations
3. Employment Expectations
4. Education History
5. Basic Skills/Education Factors
6. Education
7. Occupational Skills
8. Employment History
9. Work Readiness
10. Workplace Behavior
11. Health and Behavioral Observations
12. Living Environment
13. Economic Factors/Financial Situation
14. Vocational/Occupational Factors
15. Other Assistance Received by the Participant
16. Barriers to Employment
17. Testing Results
18. Agency Referrals

Job Center staff members are also required to develop an Individual Employment Plan with each participant who receives individualized services. The development of this Individual Employment Plan is an on-going strategy to identify employment goals, achievement objectives, and an appropriate combination of services for the participant to achieve their employment goals.

All services must be posted on the participant account and must be accompanied by an appropriate case note. These services are generally provided by the WIOA Adult and Dislocated Worker programs, although it may be appropriate for the Employment Service to provide some of these services.

Please see the Southeast Adult and Dislocated Worker Standard Operating Procedure Guidelines for more details.

Effective Date: 2/14/2018; Revised September 2019

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