REVISION
This policy has been revised to clarify the selection of eligible training programs and was approved by the MontcoWorks board on April 8, 2022.

PURPOSE
The purpose of this policy is to articulate how Individual Training Account (ITA) funds are to be administered in Montgomery County under the Workforce Innovation and Opportunity Act (WIOA).

BACKGROUND
The Workforce Innovation and Opportunity Act (Public Law 113-128) is a 2014 law designed to help job seekers across employment, education, training, and support services succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy. This policy applies to all Montgomery County Adult and Dislocated Worker participants who will participate in an ITA as well as training providers through which an ITA contract is established.

REFERENCES
- WIOA (Public Law 113-128)
- 20 CFR §680

DEFINITIONS
Adult – an individual who is age 18 or older.\(^1\)

Disadvantaged Adult – an adult who received an income, or is a member of a family that received a total family income, that, in relation to family size, does not exceed the higher of— (a) the poverty line; or (b) 70 percent of the lower living standard income level.\(^2\)

Dislocated Worker – an individual who:
A. (i) has been terminated or laid off, or who has received a notice of termination or layoff, from employment; (ii)(I) is eligible for or has exhausted entitlement to unemployment compensation; or (II) has been employed for a duration sufficient to demonstrate, to the appropriate entity at a one-stop center referred to in section 121(e), attachment to the workforce, but is not eligible for unemployment compensation due to insufficient earnings or having performed services for an employer that were not covered under a State unemployment compensation law; and (iii) is unlikely to return to a previous industry or occupation;
B. (i) has been terminated or laid off, or has received a notice of termination or layoff, from employment as a result of any permanent closure of, or any substantial layoff at, a plant, facility, or enterprise; (ii) is employed at a facility at which the employer has made a general announcement that such facility will close within 180 days; or (iii) for purposes of eligibility to receive services other than training services described in section 134(c)(3), career services described in section 134(c)(2)(A)(xii), or supportive services, is employed at a facility at which the employer has made a general announcement that such facility will close;
C. was self-employed (including employment as a farmer, a rancher, or a fisherman) but is unemployed as a result of general economic conditions in the community in which the individual resides or because of natural disasters;
D. is a displaced homemaker; or

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\(^1\) WIOA §3(2)
\(^2\) WIOA §132(b)(1)
E. (i) is the spouse of a member of the Armed Forces on active duty (as defined in section 101(d)(1) of title 10, United States Code), and who has experienced a loss of employment as a direct result of relocation to accommodate a permanent change in duty station of such member; or (ii) is the spouse of a member of the Armed Forces on active duty and who meets the criteria described in paragraph (16)(B).

**Individual Training Account** – a payment agreement established on behalf of a participant with a training provider.

**MONTCOWORKS POLICY**

**ITA Eligibility Requirements**
- Due to limited fund availability, individuals being served with MontcoWorks funds must be Montgomery County residents.
- ITAs will be issued to dislocated workers and economically disadvantaged adults as determined eligible under WIOA § 134(c)(3)(A) or 20 CFR §680.210 that have received PA CareerLink® Montgomery County interview, evaluation, assessment, or career planning services sufficient to determine the need and preparedness for a selected training program.
- Immediate family members of MontcoWorks employees or MontcoWorks subcontractors’ employees are not eligible for Adult ITA funding. However, due to the eligibility guidelines established for participation in the Dislocated Worker and Welfare programs, an immediate family member may be eligible for an ITA. Any officer, employee, or agent of MontcoWorks, or its subcontractors must disclose an immediate family member’s identity prior to submission or with the application for ITA consideration. Once the proposal has been reviewed by MontcoWorks fiscal staff and the applicable program staff, the final approval must be given by the MontcoWorks Executive Director. Should the ITA be approved, the employee must be removed from any functions or responsibilities in connection with the participant’s ITA.
  * Immediate family member is defined to include: wife, husband, mother, father, son, daughter, grandparent, grandchild, sister, brother, uncle, aunt, niece, nephew, cousin, step-parent, step-child, mother-in-law, father-in-law, son-in-law, daughter-in-law, sister-in-law and brother-in-law.
- Skilled training programs must be selected from the Commonwealth’s Eligible Trainer Provider List (ETPL). Training program selection must be oriented to the obtainment of full-time, unsubsidized, permanent employment in an in-demand occupation.
- A contract, including all invoicing and documentation requirements, will be executed between the Montgomery County Workforce Development Board, MontcoWorks, and the training provider.
- Case management will be provided to participants, including the provision of labor market information, career options, and career pathways. Staff is responsible for maintaining effective, meaningful communications with participants throughout the length of training. Additionally, staff will make contact with the Training Provider to determine progress. Staff will follow up with participants upon completion of training to offer job search assistance. If an ITA is not successfully completed, staff will offer case management to help the participant find employment.
- Participants are required to submit employment information to their case manager within two weeks of obtaining employment after the completion of their training.

**ITA Funding Requirements**

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3 WIOA §3(15)
4 20 CFR §680.300
The maximum dollar amount of an ITA is $4,000 per customer per lifetime. The $4,000 lifetime cap can be waived at MontcoWorks’ discretion, based upon additional available funding due to the receipt of a special grant(s). Waivers will be granted following the guidelines of the specific grant.

MontcoWorks will pay for the cost of training once all other sources of financial aid, including PELL and PHEAA, have been applied.\(^5\)

ITA funding can be applied to tuition, fees, books, uniforms, and any other required elements verified by PA CareerLink® Montgomery County staff as necessary for program completion.

ITA hours cannot exceed those listed on the ETPL. If hours are less than those listed on the ETPL, a written explanation by the provider is required.

Training is encouraged to be no longer than two years; however, exceptions will be reviewed on a case-by-case basis and can be approved by the MontcoWorks Executive Director.

Once a customer selects a training program, the PA CareerLink® Montgomery County Training Specialist or other appropriate staff will verify a contract is in place then prepare the ITA. All costs of training shall be listed on the ITA, including training funds covered by other sources. The ITA must then be signed by the Executive Director, the Fiscal Officer, a PA CareerLink® Montgomery County staff representative, an authorized representative from the training provider, and the customer. The customer agrees to be responsible for any training costs not covered by MontcoWorks and agrees to keep PA CareerLink® Montgomery County staff aware of any changes that may impact training outcomes.

Requests for extensions or changes related to costs and/or completion dates must be submitted to the MontcoWorks Fiscal Staff with a written explanation for approval.

If a customer is unable to complete the training program, MontcoWorks will follow the standard withdrawal refund policy of the training provider. The customer can continue to use PA CareerLink® Montgomery County services for job placement assistance.

Eligibility for and receipt of ITA funds does not in any way impact eligibility for On-the-Job (OJT) training funds or other services available through PA CareerLink® Montgomery County.

\(^5\) 20 CFR 680.230