



AB - #1774
Effective Immediately

ACTION BULLETIN

TO: All One-Stop Career Center Site Managers

DATE: July 1, 2017

SUBJECT: Individual Training Account (ITA) and On-the-Job Training (OJT) Policy

Purpose of Bulletin:

The Alameda County Workforce Development Board (ACWDB) is required under the Workforce Innovation and opportunity Act (WIOA) to set policies, for Adults and Dislocated Workers using training services that define time limits and dollar limits (caps). The purpose of this bulletin is to discuss the changes related to ITA and OJT time and dollar limits.

Citation(s):

- Workforce Innovation and Opportunity Act Section 134
- Federal Regulations Subpart C Section 680

Superseded Action Bulletins

- Alameda County WDB Action Bulletin # 4 ITA Policy – December 11, 2000
- Alameda County WDB Action Bulletin # 5 OJT Policy – December 11, 2000
- Alameda County WDB Action Bulletin #35 ITA Policy – May 18, 2004
- Alameda County WDB Action Bulletin #74 Revision to the Individual Training Account (ITA) and On-the-Job Training (OJT) Policy Revision ITA Policy – January 1, 2008
- Alameda County WDB Action Bulletin #80 Individual Training Account (ITA) and On-the-Job Training (OJT) Policy.

Policy:

Individual Training Account (ITA):

1. ITA caps will be set at \$5,000. Under special circumstances and on a case-by-case basis and with proper justification, AJCC staff may request a waiver to exceed the \$5,000 limit from ACWDB staff. Sequential training will be permitted. Requests should be made in writing to appropriate program liaisons.
2. Maximum training time will be 2 years, including sequential training activities.
3. ITA's can be combined for up to a \$7,500 limit. Under special circumstances and on a case-by-case basis and with proper justification, AJCC staff should make formal requests in writing to the ACWDB staff.
4. ITA caps will apply to both adults and dislocated workers unless state or federal regulations require revision to the policies or more stringent limitations.

On-the-Job Training (OJT):

1. OJTs will be set at \$5,000 or 520 hours, whichever occurs first.
2. OJT's can be combined for up to a \$7,500 limit. Under special circumstances and on a case-by-case basis and with proper justification, AJCC staff should make formal requests in writing to the ACWDB staff.
3. OJT caps will apply to both adults and dislocated workers unless state or federal regulations require revision to the policies or more stringent limitations.

Procedures

Preliminary steps before the ITA/OJT process:

- 1. Determining eligibility for WIOA is required.**
2. Pre-training assessment
 - a. Pre-Assess – Can participant obtain/retain employment with existing skill set.
 - b. Use ISOF to help participants focus on jobs in growth industries that may be appropriate for their skill sets.
 - c. Assessment of Skills, Interests, Aptitudes – EBWOL Self-Assessment, KeyTrain, CASAS, TABE, Wonderlic, etc.
 - d. Development of Individual Employment Plan (IEP)
 - i. IEP is a living document. Add information on supportive services, changes in plan or additional assessment as needed.
 - e. ITA – Begin process of researching potential training Providers through ETPL
 - f. OJT – Begin discussions with Employer regarding OJT requirements

- i. Refer employer to BDG for development of Master Agreement
- ii. Submit resume to Employer for pre-screening approval
- g. Explain the WIOA ITA requirement, process and timelines to the participant.

Steps to getting their desired training paid for with WIOA funding:

1. Determine if funding is available in GRANT CHECKBOOK to cover training costs.

2. ITA Steps:

- a. Determine whether ITA training is in the ISOF.
- b. Have participant research multiple possible training Providers or information interviews with potential employers.
- c. Review financial situation to determine ability to stay in training
- d. Ensure participant meets chosen Training Provider/Employer requirements (Reading, Math, Experience, etc.)
- e. Training Provider must be active on the CalJOBS ETPL site. Print the Provider page, showing Provider Code, Program Code, Job Code, and overall cost of the training including availability of Financial Aid and other Grants.

3. OJT Steps:

- a. Determine whether OJT Training is in the ISOF.
- b. Determine that the OJT is NOT displacing a permanent full time position.

Copies of all ACWDB bulletins can be viewed and printed from the ACWDB website at www.acwdb.com. Click on Bulletins and Forms and locate by year of effective date.

Information & Inquiries:

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