

SWAGL 15-1.3 – ITA Waiver Request Letter  
SOUTHWESTERN AREA GUIDANCE LETTER

DATE OF ISSUE  
May 10, 2022

EFFECTIVE DATE  
May 01, 2022

APPLICABILITY  
The Southwestern Area Workforce Development Board provides Workforce Innovation and Opportunity Act (WIOA) Adult, Dislocated Worker, out-of-school youth employment, and training services.

OBJECTIVE  
To outline the requirements for the submission of a waiver in accordance with Individual Training Account Policy 17-08.5, Section L. (3).

BACKGROUND  
References include the following: Public Law WIOA Individual Training Accounts (ITA) provides a mechanism for the payment of training expenses to eligible training providers for individuals receiving funds from the Workforce Innovation and Opportunity Act (WIOA).

REFERENCE  
Individual Training Account Policy 17-08.3, Section L. states;

- A. The allowable amount of training costs applicable to all Individual Training Accounts (ITAs) is dependent upon the type of occupational skill training and the range of costs for such training. The maximum cost per individual using ITAs shall not exceed the following amounts:

Degree or Certification	Maximum Years	Maximum Amount Per Year	Total Maximum Amount
Bachelors	5	\$3,000.00	\$15,000.00
Associates	3	\$3,000.00	\$9,000.00
Short-term Certifications	1	\$4,000.00	\$4,000.00

- B. A waiver request may be submitted to the WIOA Administrator to exceed the Maximum Amount per Year when it is demonstrated that the participant's financial need exceeds

their financial resources. The WIOA Administrator is authorized to grant or not grant the waiver. The Administrative Entity will provide a guidance letter on the waiver request criteria and submission instructions.

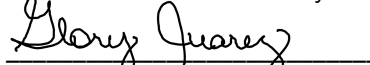
ACTION

- A. When the WIOA Training Services Contributions and Cost Sharing Worksheet of the ITA contract or a spreadsheet shows an unmet need that exceeds \$4,000.00 for Short-term Teacher certifications and short-term certifications with Participants from NMCD or \$3,000.00 for an associate or bachelor's degree in the Direct Training Expenses category, service providers must provide a narrative justifying the need. (Living Expenses are excluded – see attached ITA contract)
- B. Short-term Certifications are not waiver eligible, except for teacher certifications.
- C. The candidate's ITA contract must be attached to the waiver request letter.
- D. Address the Waiver Request Letter to:  
  
Glory Juarez, WIOA Administrator  
Southwestern Area Workforce Development Board  
PO Box 1072  
Elephant Butte, NM 87935  
  
AND  
  
Email to:  
  
gjuarez@sccog-nm.com  
kshook@sccognm.com  
jsimms@sccog-nm.com
- E. Upon receipt, an email reply will be sent indicating that a response will be provided within one to two working days.

RESCISSION

SWAGL 15-1.2 – ITA Waiver Request Letter  
INQUIRIES

WIOA Administrative Entity – 575-744-4857

  
Glory Juarez, WIOA Administrator

05/16/22  
Date