Workforce Development Board Mid-Ohio-Valley   **Policy # 12**

Subject: **Individual Training Accounts (ITA)**

Effective Date: **September 27, 2019**

References: Workforce Innovation and Opportunity Act, Section 134 (c) (3) (F) (iii), (G), WIOA Sec. 3(7)(B), and WFWV Guidance No. 15-12 Change 1

Background: Workforce Development Board and Opportunity Act identifies the Individual Training Account as the primary means of providing training to eligible individuals (as defined by the Workforce Innovation and Opportunity Act) and who are not able to obtain grant assistance from other sources or require WIOA assistance in addition to other sources of grant assistance. The ITA system is designed to provide customer choice within the guidelines established by the local Workforce Development Board. TEGL 17-07 allows the use of Technology Based Learning (TBL) as an approved means of training.

Policy: The Workforce Development Board Mid-Ohio Valley has established the following guidelines to be used in implementing Individual Training Accounts, *if funds are available*:

➢ WIOA funds will be obligated for the current fiscal year in which the award request is approved. All ITA/Scholarship Award Requests issued will expire on June 30 of the fiscal year in which they were approved. Any exceptions must have the Workforce Development Board's Director or her designee's approval prior to the end of the fiscal year.

➢ All WIOA Adults, Dislocated Workers, and Youth applying for an Individual Training account (ITA) must pass drug testing as required in guidelines outlined in WFWV Guidance No 15-12 Change 1, to be enrolled in and be eligible/receive funding for an ITA.

Award Limits
➢ Funding:
  ➢ A maximum of $5000 in WIOA funding may be available for the first year of training with a maximum of $10000 available over a 36-month period to potentially be used for tuition, fees, books, and required supplies.
  ➢ If other financial aid is available (excluding loans), it must be applied to **tuition and fees** prior to WIOA funds being expended. WIOA **funds may be applied to books and required supplies prior to other financial aid, including HEAPS, or WV Invest funding.**
  ➢ If a customer will be utilizing ITA funds to complete more than one certification/credential, allowing for a career pathway, $1000 may be available for the first year of training with director approval.

➢ Distribution of Funds: WIOA funding will be distributed proportionally considering the following; length of training, program of training, financial aid, projected expenses over the course of training, and WIOA funds available. **If a participant started training prior to**

being registered with WIOA, their ITA Award will be pro-rated on a case by case basis.

➢ <u>Time</u>: The WIOA customer has 36 continuous months to complete training, calculated from the start date of the term WIOA began funding training. No extensions will be issued.
➢ <u>Training limits</u>: Customers will qualify for one (1) occupational training program in each five-year period. This requirement may be waived if a customer is affected by sudden, severe economic dislocation or approved by the Workforce Development Board Program Director or designee.
  • If funding is limited, a Standard Operating Procedure is in place to prioritize the applications for training programs.

Types of training funded:
➢ Training must lead to employment in an occupation that meets the guidelines in WDB MOV Policy on Demand and Targeted Occupations (Policy #11)
➢ WIOA training funds may only be used for training in programs that have been approved and are on the state training provider list.
➢ Programs that are considered a "Career Pathway," including pre-apprenticeship/apprenticeship programs that lead to improved employment opportunities.
➢ An internship should be combined with an ITA and be related to the customer's occupational/ employment/ training goal. An internship will be limited to 400 hours with a minimum of 20 hours per week, unless additional training is approved by the WDB Director or designee. The worksite is expected to be the employer. Funds paid out for the internship will not impact funds available for the ITA.

Submission Deadline
All ITA's must be received to the WDB at least 5 business days prior to the start date of training. This will allow the staff to review funds exist to cover all costs included in the ITA.

Lapse in Training
If there is a consecutive 30-day lapse in training for any reason, other than an approved medical leave or emergency leave, the ITA will be cancelled and all remaining funds will be de-obligated. Medical leave or emergency leave must be approved prior to a lapse in training by the WDB Director or designee.

Training Extensions
A Training extension must be approved by the WDB Director or designee if the training provider charges a "fee" associated with the extension.

Additional Requirements:
 To qualify for and continue training, trainees must:

- Document soft skills or complete a Soft Skills training program prior to or in conjunction with skill training
- Complete Career research packet prior to start of training (effective July 1, 2017).
- Demonstrate through assessment results (i.e.: TABE, WorkKeys, college entrance exams) the basic skill sets to successfully complete training and obtain employment in the proposed occupation.
- Maintain a "C" (2.0) grade point average each semester or quarter. The customer will be on probation for the next semester/quarter when the GPA falls between a 1.0 and a 2.0; if two back to back terms are below the 2.0 GPA, funding will be terminated.

- If the GPA for a term falls below 1.0, the award will not be renewed for the next term. If the customer brings his/her grades up to the required 2.0 in that next term, the award may be reinstated once the proper documents are received, if funds are available.
- Have acceptable attendance as defined by the training provider.
- Maintain required contact with Workforce WV case manager.
- Be enrolled in and attend training for all terms until the completion of the program. Prior approval from the WDB Director or designee is required to "sit out" a term.
- If a participant fails to maintain the listed requirements, funding will be terminated. Any remaining cost will then be the responsibility of the participant.
- ITA customers participating in a WIOA funded internship must be placed in an occupation related to training and must have completed at least 50% of the required course work at 2.8 GPA or greater, or with permission from the Director.

Availability of Funds and Waitlist

WDB Region 4 reserves the right to enforce an ITA waitlist for Adult and/or Dislocated Worker ITA's due to availability of funding.

Restrictions:

WDB MOV WIOA funds cannot be used for:
- Funding a customer who (1) has a student loan in default, or (2) is in default with the current training institution.
- Medical or dental procedures (excluding required exams, drug screenings, and TB tests)
- Lost books or supplies or books /required supplies for repeat classes
- Classes that must be repeated
- Any training beyond a bachelor's level without prior approval of the WDB Director or designee

Modifications of ITA:

Requests to modify ITA/Award Requests may be approved on a case by case basis at the discretion of the Program Director or her designee.

Action: Workforce WV centers will make customers aware of potential benefits and assist in making an informed decision about employment and training options. Exceptions to this policy may be approved by the WDB Director or designee on a case by case basis.

WDB Staff has developed a Standard Operating Procedure and ITA / Scholarship Award Request forms in conjunction with the One Stop provider staff and will update the forms as necessary. These forms should be used by Workforce WV centers to refer individuals to training providers on the state approved training provider list.

Expiration Date: This policy shall be in effect until revised or canceled by the Workforce Development Board Mid-Ohio Valley.

Approved:

June 26, 2015	LEOs/Executive Committee
July 24, 2015	LEOs/Board
October 28, 2016	LEOs/Board
April 28, 2017	LEOs/Board
August 24, 2018	Executive Committee
January 25, 2019	LEOS/Board
September 27, 2019	LEOS/Board