



Workforce Investment Board Mid-Ohio-Valley

Policy #02

Subject: Individual Training Accounts (ITA)

Effective Date: July 1, 2010

Background: The Workforce Investment Act identifies the Individual Training Account as the primary means of providing training to eligible individuals who are not able to obtain grant assistance from other sources or require WIA 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 Investment Board. TEGL 17-07 allows the use of Technology Based Learning (TBL) as an approved means of training.

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

- WIA 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 Investment Board's Director or her designee's approval prior to the end of the fiscal year. Requests for continued funding must be submitted to the Workforce Investment Board one month in advance of the start date of the next term of training.
- Request timeline: ITA Award requests should be submitted to the WIB a minimum of two weeks prior to the customer's requested start date. Award requests received and signed by the case manager after the term has started will NOT be considered for that term, but may be considered for the next term if funding is available.

Award Limits

- Funding:
 - A maximum of \$3000 in WIA funding may be available for the first year of training with a maximum of \$6000 available over a 36 month period to potentially be used for tuition, books, and required supplies.
 - If other financial aid is available (excluding loans), it must be applied to all training costs prior to WIA funds being expended.
 - The first year of training is calculated from the start date of the term WIA began funding training.
 - \$3000 is the maximum amount that will be expended in the first 12 months; \$6000 is the maximum amount to be expended over the 36 months.
- Time: The WIA customer has 36 continuous months to complete training, calculated from the start date of the term WIA began funding training. No extensions will be issued. A customer may not "sit out" from training in order to be accepted into a selective program and continue WIA funding. The customer is expected to attend all terms offered by the school in order to graduate as projected.
- Training limits: 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 Investment Board Program Director, unless the customer has marketable skills which the WIB is still funding based on the Demand and Targeted Occupations List (Policy #23).

- If funding is limited, a Standard Operating Procedure is in place to prioritize the applications for training programs.
- Customers who have been in training for the longest period of time and are closest to program completion will be given priority in funding.

Types of training funded:

Training must lead to employment in an occupation that meets the guidelines in WIB MOV Policy on Demand and Targeted Occupations (Policy # 23)

- WIA training funds may only be used for training in programs that have been approved and are listed on the state training provider list.

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
- Demonstrate through assessment results (i.e.: TABE, WorkKeys,) the basic skill sets to successfully complete training and obtain employment in the proposed occupation
- Meet pre-requisites of course to qualify for funding
- Apply for PELL and other financial aid and, apply those funds, excluding loans toward all schooling costs prior to WIA funds being applied.
- Maintain a full course schedule each semester/quarter so as to graduate within the time allowed for funding/program completion.
- 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 and submits them to the case manager, 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.

Restrictions:

WIB MOV WIA 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.
- More than two (2) developmental classes overall. Invoices with more than 2 developmental courses taken by the individual will be prorated.
- Medical or dental procedures (excluding required exams, drug screenings, and TB tests)
- Lost books or supplies
- Classes that must be repeated
- Any training beyond a bachelor's level

Modifications of ITA:

Requests to modify ITA/Award Requests will be made on a case by case basis at the discretion of the Program Director or her designee. Requests must be submitted in writing to the Workforce Investment Board office with sufficient documentation to warrant the request. Requests for changes in occupational

skill training must be received in the WIB office and approved prior to the start of the new training program and will only be considered if the change is in the same field as the original occupational goal. Requests for time extensions beyond the 36 month cap will not be considered.

Action: Workforce WV centers will make customers aware of potential benefits ~~to~~ and assist in making an informed decision about employment and training options. A request for training funds must be submitted to the WIB MOV prior to the start date of the term for which funding is requested. Individuals enrolled in training must submit documentation of requirements as outlined above, including regular contact with Workforce WV. A participant's failure to respond to requests for information and contact may result in cancellation of any funding obligations on the part of the WIB.

WIB 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 Investment Board Mid-Ohio Valley.

Approved:

WIB MOV Executive Committee	August 23, 2000
WIB MOV Executive Committee	Sept. 7, 2000
WIB MOV (length of training tabled)	Sept. 25, 2000
WIB MOV	Oct. 25, 2000
WIB MOV	Jan. 24, 2001
WIB MOV	March 28, 2001
WIB MOV	October, 24, 2001
WIB-MOV	April 23, 2003
WIB-MOV Executive Committee REMOVE additional \$1000 per for required books, tools, uniforms or supplies.	June 27, 2003
WIB-MOV REMOVE stipulation that customer apply for funds prior to enrolling in training -WIB & Executive	April 28, 2004
LEO	April 30, 2004
LEO	February 25, 2005
LEO/Executive Committee	June 24, 2005
WIB, Executive Committee	July 26, 2006
LEO	July 28, 2006
WIB, Executive Committee Reduced ITA to \$6000 maximum (\$3000 per year).	Oct. 24, 2007
LEO	Oct. 27, 2007
LEO	Feb. 6, 2009
LEO	April 24, 2009
LEO/Executive Committee	December 11, 2009
LEO	June 25, 2010