



Workforce Investment Board Mid-Ohio-Valley

Policy #02

Subject: Individual Training Accounts (ITA)

Effective Date: July 1, 2000

Background: The Workforce Investment Act identifies the Individual Training Account as the primary means of providing training to individuals. This ITA system should be designed to provide customer choice within guidelines established by the local Workforce Investment Board. TEGL 17-07 addresses 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 request is approved. ~~All ITA's 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 ~~by Workforce WV to the Workforce Investment Board one month in advance of the start date of the next term of training in the spring of each year. This policy will apply retroactively to all ITA's in active status on July 1, 2003.~~
- Request timeline: ITA requests should be submitted to the WIB a minimum of two weeks prior to the customer's requested start date and no earlier than three months before training begins.

Award Limits

- Funding: \$4000 for the first year of training with a maximum of \$8000 to be used for tuition, books, and required ~~and general~~ supplies. ~~Up to \$25 may be awarded for miscellaneous supplies per semester/quarter, if funding allows.~~ First year of training is calculated from the ~~training start date~~ WIA began funding training. If other financial aid is available (not loans), it must be applied to tuition and fees prior to WIA funds.
- Time: The WIA customer has 36 months to complete training, based on the training start date. \$4000 will be available for the first 12 months and an additional \$4000 will be available for the remaining 24 months.
- 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.

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 grants and, if eligible, apply those grants toward tuition.
- 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. If two back to back terms are below the 2.0 GPA, funding will be terminated.
- 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

- More than three (3) developmental classes.
- 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 ITAs will be made on a case by case basis at the discretion of the Program Director or her designee. Requests ~~may~~ **must** be submitted in writing to the Workforce Investment Board office with sufficient documentation to warrant the requests. Requests for changes in occupational skill training and/or time extensions beyond the 36 month cap will not be considered.

Action: Workforce WV centers working with individuals from the WIB MOV will make customers aware of potential benefits to assist in an informed decision about employment and training options. A request for training funds must be submitted to the WIB MOV prior to approval of training related funds. 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 forms in conjunction with the One Stop provider staff and will update the forms as necessary. This form should be used by Workforce WV centers to refer individuals to training providers approved by the Workforce Investment Board Mid-Ohio Valley.

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