

Policy Name: Individual Training Account (ITA)
Policy Number: BGWIOA-R17-T5
Effective Date: June 28, 2017
Applies To: Adult, Dislocated Workers, Older Youth

1. **Purpose:** To provide guidance to staff, including subcontracted staff, on how to administer ITA to clients.
2. **Background:**
 - (Replaces BGWIOA-N16-T5)
 - Title I of the Workforce Innovation and Opportunity Act (WIOA) of 2014, Sections 108 and 134(c)(3).
 - WIOA Department of Labor Final Rule (81 FR 56072, Aug. 19, 2016).
 - Veterans' Program Letter (VPL) 07 - 09,
 - Implementing Priority of Service for Veterans and Eligible Spouses in all Qualified Job Training Programs Funded in Whole or in Part by the U.S. Department of Labor.
 - Policy Guidance Letter (PGL) WIOA 2015
 - 06, Eligible Training Providers for WIOA Title I Adult and Dislocated Worker Programs.
3. **Definitions:**
 - **Credential:** Credential is defined as a document or certificate proving an individual's qualifications, such as: diploma, degree, license, or certification.
 - **Eligible Training Provider List (ETPL):** A list established by the Workforce Innovation and Opportunity Act (WIOA) of 2014 to provide customer-focused employment training resources for adults and dislocated workers. Training providers who are eligible to receive Individual Training Accounts (ITAs) through WIOA Title I-B funds are listed on the ETPL.
 - **School Fees:** For the purpose of this policy school fees are defined as: cost for books, special equipment required for class work, certification tests, etc.
4. **Policy:**
 - A. **Training Guidelines:**
 1. The cost of training cannot be more than that charged to the general public.
 2. ITA's will be issued only for training programs on the Eligible Training Provider List (ETPL) which lead to credentials utilized in Bluegrass Workforce Innovation Board identified target industry sectors.
 - a. Credentials in other sectors will be considered on a case-by-case basis.
 3. The limit for maximum financial assistance through an ITA is \$8,500.
 - a. ITA's may be spent on tuition and school fees.
 - b. Workforce staff will review the training needs of the individual to make the determination of how the maximum financial assistance available is best applied to meet the overall needs of the individual.
 - c. The workforce staff supervisor/manager will review the financial assistance requested amount.
 4. Individuals attending a program consisting of a single enrollment period (i.e. nurse aide training) will qualify for a maximum ITA of \$8,500 to include tuition and school fees.
 - a. Workforce staff will review training needs of the individual to make determination of how maximum financial assistance available is best applied to meet overall needs of the individual.
 - b. The workforce staff supervisor/manager will review the financial assistance requested amount.

5. Training is limited to programs of up to two years in length and must lead to a credential.
 - a. A two-year program must show a completion date within 104 consecutive calendar weeks.
 - b. In extenuating circumstances training, may be extended beyond two years, if appropriate documentation is provided as to why the individual needs a training extension.
 - c. The maximum of \$8,500 for tuition and fees would still apply.
6. Individuals may receive up to \$600 per year additionally for up to two years.
 - a. Supportive services may include items such as test fees, books, tools, and uniforms.
7. Participants will be responsible for providing full and accurate information to the workforce staff regarding their financial obligations.
 - a. It is the responsibility of the workforce staff to verify that the information provided by the participants is true and correct.

B. Satisfactory Progress:

1. A continuation of tuition payments will be based on the participant making satisfactory progress.
2. The participant is required to provide his/her workforce staff with a copy of his/her grades within 30 days of the end of the grading period.

C. Cessation of Training:

1. Clients who have previously been enrolled in classroom occupational training, but did not complete training, cannot be enrolled in another training program unless the reason for incompleteness was through no fault of their own.
2. Clients who are forced to stop training due to no fault of their own will be allowed one time per enrolled training to drop out of for up to 6 months at a time.
3. Decision on allowable reason for dropping out will be on the workforce staff under consultation of the workforce staff supervisor/manager.

D. Additional Dislocations:

1. A client can be enrolled in training only one time per dislocation.

5. Inquiries:

Questions should be addressed to the Workforce Services Manager and/or the Director of Workforce Services.