

## **INDIVIDUAL TRAINING ACCOUNT (ITA) POLICY 2022**

An Individual Training Account (ITA) provides approved course instruction in locally-identified skill-shortage and/or high-demand occupations through community colleges, private schools or other training institutions approved by the Workforce Development Board. An ITA is designed to provide training in a variety of occupational areas for customers based on individual needs. ITAs can also be used to upgrade skills of employed workers who are locked into low-paying jobs or dislocated workers who need just a few additional skills to return to the workforce.

The local ITA (Individualized Training Account) is a system through which a training voucher is issued to an eligible customer for training. The ITAs are established through the WIOA case manager at the Career Center after agreement has been met as to the customer's occupational choice. A voucher will then be issued which is redeemable at training providers who have been approved by the Local Board and are included on the statewide list of approved training providers. ITAs will be established only for demand occupations within the local area or an area where the customer is planning to relocate. The vouchers are non-transferable and will be issued on an incremental basis (i.e. by semester, quarter, etc.). The ITA will cover the cost of books and tuition/fees. The accounts will be coordinated with the training providers' financial aid departments, and/ or business office.

**ITAs are issued utilizing the “Foothills Region Workforce Innovation and Opportunity Act Authorization for Training” form available in electronic format (MS Excel format)—see copy attached.**

**A financial award analysis must also be completed for each participant prior to the issuance of the authorization for training. The form is also available in electronic format (MS Excel format)—see copy attached**

### **a. Curriculum Selection**

Customers will be enrolled in approved courses of instruction. Selection of a curriculum generally depends upon three factors:

1. the customer's educational and employment goals as defined in his/her Individual Employment Plan.
2. an analysis of skill demand areas ( WDB approved occupations)
3. the customer's ability to complete the curriculum in the one to two year curriculum schedule and to obtain long-term employment in that area

The labor market for skill demand areas (occupational outlook) will be assessed prior to approval of the curriculum for the customer. Types of curriculums available to WIOA customers are **vocational and technical in nature**. Consideration for approval will be given to curriculums which provide training for jobs that have significant openings projected and that have been proven

to provide an average annual income sufficient to meet the goals of the customer and the intent of WIOA, as cited in the Local Area Strategic Plan. Prerequisites for curriculums **may** be approved, after consultation with local area leadership, prior to the applicant's acceptance into the curriculum (e.g. LPN, RN, Radiology).

ITAs will be issued to cover the cost of training for certificates, AA/AS degrees, bachelor's degrees, and advanced degrees with the following considerations:

**Certificates:** Certifications that can be obtained in 6 months—e.g. Certified Nursing Assistants, Truck Driver Training, EMS, Basic Law Enforcement, and etc.

ITA's will be utilized for programs that are listed on the approved training provider list—NCWORKS. Continuing Ed. and other certificate programs may be paid for using a purchase order or other means of payment.

**AA/AS Degrees:** Occupational degrees that will be completed in 2 to 3 years.

**Bachelor of Arts/Science:** Occupational specific degrees that can be reached within 2-3 years and builds on previous college experience and credits—e.g. Teaching, Engineering, Accounting, and etc.

**Advanced Degrees:** Masters of Arts/Science degrees that are occupation specific, build upon an already-achieved undergraduate degrees and can be completed in 2-3 years—e.g. Human Resource Development, Counseling, Teacher's Certification, Public Administration, and etc.

It will be necessary to leverage additional financial resources to cover the cost of bachelor's and advanced degree training programs.

#### **b. Coordination With Other Financial Aid**

WIOA funds will be supplemented by other federal sources of financial aid. This will allow WIOA to serve more eligible persons. Each individual enrolled in a training program where student financial aid is available will be required to complete and submit to the Student Financial Office a Free Application for Student Financial Aid (FAFSA). The training case manager will verify the FAFSA application with the training provider financial aid office. Upon approval for PELL, the customer must inform the case manager of the approval.

The WIOA Service Provider will coordinate funds available for training with the Financial Aid office of the selected Training Provider. The Financial Aid office of the selected Training Provider shall determine the Cost of Attendance based on the individual's need. The Cost of Attendance will take into account the estimated costs of tuition, fees, books, supplies, room and board, personal expenses, transportation, child care and/or other education-related expenses.

**GENERAL POLICY:** An Individual Training Account Voucher will be issued to the customer for redemption at an approved training provider. WIOA funds should be used to cover the costs of tuition and other related program costs (e.g., fees, books, supplies) and Pell Grant funds should be used to cover living expenses, including transportation and child care consistent with the Cost of

Attendance analysis. Combined resources, i.e. Pell Grants, WIOA, etc. will not exceed the Cost of Attendance analysis

**EXCEPTION:** Case managers may request that WIOA funds be used to cover a portion of transportation and child care expenses where the approved Pell Grant amount is based on estimated personal resources that are no longer available to the applicant, and where funds to cover these expenses are not available from other sources (e.g., DSS). The WIOA review committee must approve the use of WIOA funds for these types of expenses.

Once the PELL check is received, the customer is responsible for paying for his/her own school-related expenses such as transportation and child care. It is the responsibility of the customer to ensure that his/her PELL Grant is used for school-related expenses.

If a customer's PELL Grant does not cover all of the school-related expenses, he/she should contact the WIOA staff. Funds for supportive services may then be available to cover these expenses. The customer must be able to demonstrate his/her financial need in order to qualify for these funds. Ideally, a strategy should be developed with PELL Grant recipients at the beginning of each semester to plan for their support costs.

### **c. Hours of Participation**

All customers are expected to carry a minimum of 12 credit hours. Prior approval must be given if a customer carries less than 12 hours. Full time employment or a lack of appropriate courses being offered may be an adequate reason for carrying less than 12 hours. Customers receiving PELL will be encouraged to take more than 12 credit hours in order to comply with their PELL obligations.

All customers are required to meet with their case manager on a monthly basis. Failure to cooperate with this policy, may result in suspension from WIOA for one term. Repeated failure may result in termination from WIOA.

**Grades must be received in all classes. WIOA will not pay for audited classes or classes that have already been paid for and must be retaken due to a failing grade or withdraw.**

### **d. Progress Towards Completion**

Customers are expected to make reasonable progress toward completion of their training. Progress will be monitored by student transcripts, schedules, and grade reports. Class attendance is required in accordance with the school's policy. Courses should only be approved when they are part of the customer's curriculum or approved electives. Courses that are not in the curriculum may be approved if the customer can show that it is related to their course of study and is needed to enhance their employability.

Customers must maintain a cumulative grade point average of 2.0 or higher. If he/she falls below a 2.0 average they will have one semester to bring their grade point average up to 2.0. If the customer is unable to improve they may be separated from the program. A release will be signed by the customer at enrollment which will enable the case manager to contact any instructor or advisor to discuss their performance and progress.

The length of participation will be limited to one term beyond the curriculum schedule for full-time students. Exceptions will be made in cases of courses not being available, illness, family problems, or part-time students who are employed.

#### **e. Withdraw from Courses**

Customers who wish to withdraw from courses should first check with their academic advisor and their case manager. The customer should withdraw officially through Student Services and should be done by the deadline set forth by the school. If a student does not officially withdraw they will receive an F for that course.

If a student withdraws completely from school within the first ten calendar days of class they are eligible for a two-thirds refund which will be credited to WIOA. It is the case manager's responsibility to ensure that the business office at the college issues the credit. If individual courses are dropped or a customer withdraws after the ten day period, there is no refund for the dropped class.

#### **f. Leave of Absence**

A leave of absence from the Individual Training Account may be granted for one term for the following reasons:

1. needed courses are not offered
2. family problems
3. employment
4. health problems

A leave may be granted for other purposes if it is determined reasonable by the staff and case manager. Absence from the program for more than one semester may result in separation from the program. A customer can re-apply and will be subject to the same selection criteria as a new applicant.

#### **g. Changing Curriculum**

Customers are discouraged from changing curriculums. Approval for changing curriculums may be given if the customer can show that they are unlikely to obtain training related employment or that they are having problems with the curriculum. There will only be one change in curriculum allowed.

The costs of training will only be covered by the program for one term beyond the scheduled terms for the customer's current curriculum.

For example: If a customer spent two terms in the Business Administration curriculum and transferred to the Electronics Engineering Technology curriculum, which is a five term curriculum, The Individual Training Account will only cover three terms of the Electronics Engineering Technology curriculum.

#### **h. Limits on Individual Training Accounts (ITA)**

The WIOA funding maximum for individual training accounts is **\$4,600.00** total expenditures for a one-year program and **\$9,200** for a two-year program.

WIOA vouchers issued from an ITA will not exceed the actual costs for tuition, books, fees and basic supplies or the amount of the above costs not paid by other grants or financial resources.

Supplies needed beyond the need of basic classroom activities such as tools, calculators, uniforms and etc., may be covered with WIOA funds through purchase order arrangements or reimbursement to the student. **Assistance for these items will be limited to \$500.00 per program year (July 1 through June 30). Pell Grant should be considered first for use for this assistance and provided only to those individuals most-in-need.**

**Attachments**

**FOOTHILLS REGION WORKFORCE DEVELOPMENT BOARD  
WORKFORCE INNOVATION AND OPPORTUNITY ACT  
Authorization For Training**

WIOA Customer: \_\_\_\_\_  
 Social Security Number: \_\_\_\_\_ Expected Completion Date: \_\_\_\_\_  
 Approved Course of Study: \_\_\_\_\_ Applied for Pell Yes No N/A  
**Fund:**  
**ADULT** \_\_\_\_\_ **DW** \_\_\_\_\_ Semester/Year: \_\_\_\_\_

**Local WDB Foothills Region**

Foothills Regional Commission  
 PO Box 841  
 Rutherfordton, NC 28139

**Training Provider:**

Contact Person:	Contact Person:
Phone:	Phone:
Fax:	Fax:
Email:	Email:

**Approved Services:(please fill in the approved amount for each service)**

Application/Registration			Fees	
Tuition			Supplies	
Books			Other	

**Total amount of approved funds not to exceed**                      \$ \_\_\_\_\_

Notes

This Voucher Certificate is approved and issued by:

(Authorized Signature)	(printed Name)	(Date)
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**Redemption of Voucher**

**To Redeem:**     The training provider must return this voucher along with sufficient documentation to support the amount of money being requested for services rendered to the WIOA customer.

<u>Type of service</u>	<u>Cost</u>	<u>Type of service</u>	<u>Cost</u>
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Application/Registration		Fees	
Tuition		Supplies	
Books		Other	

Total Cost		Total Cost
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Authorized Signature

Printed Name

Date

Please submit to: Foothills Region Workforce Development Board, PO Box 841, Rutherfordton, NC 28139, attn: Diane Hodge  
The Foothills Region Workforce Development Board does not discriminate  
on the basis of race, color, national origin, creed, sex, religion, age, or disability.

### Financial Award Analysis

TRAINING PROVIDER \_\_\_\_\_

WIOA Participant Name	SS#	Telephone #
Training Start Date:	Estimated Training End Date:	
Type of Training	No. of Semesters	
Training Provider Contact Person	Telephone #	

Training Items Cost of Attendance	Fund Assignments (1-4 Under Funding Sources)	Costs Per Semester	Number of Semesters	Total Cost of Training Services
Application/Registration				\$0.00
Tuition				\$0.00
Books/ Supplies				\$0.00
Clinic/Lab Fees/Uniforms				\$0.00
Physicals				\$0.00
License/Permits				\$0.00
Parking Fees				\$0.00
Student Activity Fees				\$0.00
Transportation				\$0.00
Child Care Cost				\$0.00
Other Required Cost				\$0.00
Other Required Cost				\$0.00
<b>TOTAL PROJECTED COST OF TRAINING</b>				<b>\$0.00</b>

Available Funding Sources (Documentation attached)	Aid Per Semester	Number of Semesters	Total Available Resources
1. Federal Pell Grant			0.00
2. Scholarships/Grants/Other			0.00
3. Other Sources: Specify			0.00
4. Vocational Rehab/Social S			0.00
5. Total Non-WIOA Resources			0.00
6. Needed/Requested WIOA Resources			0.00
7. Additional Resources Needed			0.00

I, \_\_\_\_\_, authorize and consent to the release and exchange of confidential information to the WIOA Service Provider and the Training Provider.

**Signatures:**

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WIOA Participant      Date

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Training Provider      Date      WIOA Service Provider      Date