



200 New River Town Center
Beckley, WV 25801

WORK4WV-Region 1 Inc.

Region 1 Workforce Development Board Policy Letter #04

Subject: Individual Training Accounts

Effective Date: July 1, 2016

Purpose: This policy outlines the process for the Individual Training Account (ITA), a system established under the Workforce Innovation and Opportunity Act to purchase training from a certified eligible provider of training services on behalf of an eligible participant.

Background: The Workforce Innovation and Opportunity Act (WIOA) establish the Individual Training Account (ITA) as one of the principal methods for WIOA-eligible participants to access needed training services. The Region 1 Workforce Development Board will approve regionally eligible training providers and programs who submit an initial or renewal application via the MACC (Mid-Atlantic Career Consortia computer system and has been granted state approval. Workforce Advisors at the One Stop Centers will provide eligible participants with access to training provider information so that participants can make an informed decision in regards to training providers thereby focusing on a customer choice driven philosophy.

Policy: The Region 1 Workforce Development Board may provide eligible WIOA participants with training services according to local provisions and according to availability of funds.

Limitations on Programs:

- ➔ Training costs, reimbursable by WIOA, shall not exceed a total of \$5,000 to include tuition, fees, books, supportive service payments, and if required by the program, supplies, tools and special equipment for no more than a thirty (30) month period. An individual who does not utilize the full amount of an ITA may in turn be eligible for the WIOA On-the-Job Training (OJT) Program operated by the Region 1 Workforce Development Board. However, the total OJT award will not be in excess of the remaining balance of the individual's paid out ITA costs.
- ➔ Training costs incurred prior to the time the ITA approval is granted may not be approved for payment. The training provider and/or participant shall provide documentation of sources of income or funding for a training program that costs in excess of the amount approved for WIOA funding.

- If a participant is enrolled in a training prior to issuance of an ITA, participant **must** provide the Workforce Advisor their most recent transcript related to their current training program to determine current progress in program.
- Participants will be limited to one (1) occupational skills course or training program whether the participant successfully or unsuccessfully completes the program and that only under extraordinary circumstances, with special approval, can a participant be eligible to reenter additional training. However, if the participant successfully completes the first occupational skills course or training program they may apply for an additional ITA in order to advance in the occupation career path or career ladder. The individual must have exited from the MACC and must be employed in the field in which the first ITA was written for the first four (4) quarters after exit before another ITA will be issued.
- Participants may transfer (**must** have prior approval from the Region 1 Programs and Scholarships Manager) from a training institution of higher education to another as long as all accumulated hours are accepted by the receiving institution and will still be able to complete within the original required 30 months.
- Workforce Innovation and Opportunity Act funding shall not be provided for individuals changing programs unless a reassessment is conducted at the WORKFORCE West Virginia Career Center, nor will the costs of any repeated course(s), lost books, etc., be borne by Region 1 Workforce Development Board / WORK4WV Region 1, Inc.
- Transfers will not be approved for participants attending providers of training other than institutions of higher education.
- Funds shall not be approved for sectarian training or activities.
- The participant will be required to apply for grant assistance from other sources to pay the costs of training including such sources as Federal Pell and/or Promise grants, Division of Rehabilitation Services, State-funded training funds, and Trade Adjustment Assistance. WIOA assistance may be in addition to, not in place of, other grant assistance.
- Advanced degrees beyond a Bachelor Degree will not be considered for funding unless (1) the participant can prove long term unemployment in the field of their current degree, and (2) the advanced degree is a demand occupation in Region 1, and (3) the training can be fully funded by the ITA.
- Region 1 reserves the right to limit funding for certain trainings, including trainings on the Region 1 Demand Occupation List based upon supply / demand ratio of trainees vs. openings.
- Distance learning and e-learning classes will be approved only if they are part of an approved, accredited curriculum and attendance can be verified. Supportive Services for non-classroom training will not be available.

10. Duration/Terms of Training Program: Length of training shall be based on the time needed to adequately learn occupational skills and cost effectiveness. Training must be completed within thirty (30) months. Training must begin within ninety (90) days of the date in which the individual receiving the ITA tested negative to the drug screen as mandated under the policy of WorkForce West Virginia (Workforce West Virginia Guidance No. 15-12-Workforce Investment Act Participant Drug Screening). Participant must enroll, and participate in no less than 12 credit hours per semester (excluding summer sessions) and / or 10 instructional hours per week. Exceptions may be granted in limited circumstances as it relates to training programs of a short nature leading to a nationally recognized credential.

11. Exceptions to ITA Policy: A waiver to the ITA policy may be granted where there exist an insufficient number of eligible providers of training in the local area or where a training service program is demonstrably effective in servicing special populations.

12. Memorandum of Understanding (MOU) and Individual Employment Plan (IEP): All participants of the Individual Training Account (ITA) program must sign the Region 1 Workforce Development Board / WORK4WV Region 1, Inc. Memorandum of Understanding and an Individual Employment Plan (IEP) prior to receiving training services.

13. Requirements for ITA Award:

- a. Participant must possess a High School diploma or TASC. In special circumstances this may be achieved simultaneously with ITA sponsored training.
- b. Participant must meet WorkKeys® score as defined in the WorkKeys® Profile Guide for their chosen occupational training.
- c. Have met the following requirements and received the following minimum services as outlined below:
 - (1) Orientation to the WORKFORCE West Virginia Career Center System
 - (2) WIOA eligibility determination
 - (3) WorkKeys® assessment in Applied Math, Reading for Information, and Locating Information
 - (4) A Drug Test as mandated under the policy of WorkForce West Virginia (Workforce West Virginia Guidance No. 15-12-Workforce Investment Act Participant Drug Screening) (See Attachment A)
- d. Choose an occupation that has been determined as a demand occupation within Region 1 as defined by the current Region 1 Demand Occupation List. Region 1 will only consider other training occupations not listed on the demand occupation list when a school, employer, job seeker, economic development agency, or other entity can provide written proof that such an occupation is in demand. The Region 1 WDB will review the data and issue a decision approving or denying the occupations based on the information provided, or on O*Net justification.
- e. Engage in labor market research and complete a WIOA Research Assignment to answer questions pertaining to availability of occupational openings in the area, rate

of pay, hours of work, ability and willingness to take openings, transportation and child care requirements. Documentation must be submitted on forms provided by the Workforce Advisor (See Attachment B).

- f. Upon Negative Drug Screen results the participant must meet with a Workforce Advisor to complete the ITA Packet (See Attachment C).
- g. Must be accepted into the selected training program, by the training provider, with supporting documentation.
- h. Participant must complete a Federal Application for Student Aid (FAFSA) to apply for PELL grant, if the training provider of choice is a PELL Eligible Institution. Participant must submit a Student Aid Report (SAR) indicating the results of the FAFSA with the Research Assignment **before** an ITA is issued. Must apply for PELL and submit a SAR **each** school year while in WIOA funded training to continue receiving WIOA funding.
- i. If a participant is enrolled in a training prior to issuance of an ITA, participant **must** provide the Workforce Advisor their most recent transcript related to their current training program.

14. Failure to Abide: Failure to abide by this policy relieves the Region 1 Workforce Development Board / WORK4WV – Region 1, Inc., of any obligation to pay for any costs incurred.

Approved:	August 04, 2016	Executive Committee
	August 18, 2016	Region 1 Workforce Development Board
	August 24, 2016	LEO Board

**REGION 1 WORKFORCE DEVELOPMENT BOARD
WORK4WV-REGION 1, INC.
MEMORANDUM OF UNDERSTANDING (MOU) WITH PARTICIPANTS**

I, _____, am receiving services under the Workforce Innovation and Opportunity Act of 2014 (WIOA). I agree to the following conditions and statements in order to receive services.

_____ I understand that funding may be provided in order to complete occupational training. This training **must** be completed within 30 months. Training must begin within ninety (90) days of the date in which I tested negative to the drug screen as mandated under the policy of WorkForce West Virginia (Workforce West Virginia Guidance No. 15-12-Workforce Innovation and Opportunity Act Participant Drug Screening). Training is limited to one (1) training opportunity whether I successfully or unsuccessfully complete the training and that only under extraordinary circumstances, with special approval, can I be eligible to reenter additional training.

_____ I am aware that Workforce Investment Act funds for Region 1 are limited and may exhaust before my training is complete. Therefore, I understand Region 1 Workforce Development Board/WORK4WV-Region 1, Inc. will not be obligated to continue providing any further funding for my training. Training services are not an entitlement.

_____ I understand that WIOA may not pay for any training costs incurred prior to the ITA issue date.

_____ I will enroll, participate and complete in no less than 12 credit hours per semester (excluding summer sessions) and / or 10 instructional hours per week.

_____ If my training facility is Pell Grant eligible, I must apply and submit the Student Aid Report (SAR) before an ITA is issued. I must apply for PELL and submit a SAR each school year while in WIOA training to continue receiving Workforce Investment Act funding.

_____ I must provide the Workforce Advisor a copy of my most recent transcript related to my current training program before issuance of an ITA and for each grading period thereafter in order to continue receiving WIOA funding.

_____ I understand that any default on federally funded or federally guaranteed student loan(s) may disqualify the awarding of any and all WIOA funds.

_____ I must be making satisfactory progress in my training program or WIOA funding may be suspended. Satisfactory progress is completing the report period (i.e., semester or quarter) with a minimum of 2.5 GPA (grade point average). If I am eligible for supportive services I must submit to my Workforce Advisor my grades each reporting period.

_____ I must submit my attendance form every two (2) weeks whether or not I am receiving supportive service payments.

_____ I will notify my training provider immediately if I accept temporary or permanent full or part-time employment while receiving services and after completing the program. This information will not result in loss of WIOA funding.

_____ I understand that if I have any questions or need assistance I will contact my local Workforce Advisor to assist me.

_____ I understand that I have the right to file a grievance under the WIOA Regulations section 667.600 and section 181 of the Workforce Investment Act.

_____ I agree to the conditions in this MOU.

_____ I refuse the conditions in this MOU.

Participant Signature

Date

The undersigned has reviewed this document with the participant and was able to respond to the participant's questions. The participant appeared to understand the conditions contained in the Memorandum of Understanding (MOU).

Workforce Advisor

Date