

CDO WORKFORCE INVESTMENT BOARD

POLICY #07-06.1: **REVISED** - Individual Training Accounts

DATE: September 9, 2008

APPLIES TO: WIA Title I-B Adult, Dislocated Worker and Out-of-School Youth Programs

Subject

Revised policy for the use of Individual Training Accounts (ITAs) for WIA-enrolled Adults, Dislocated Workers and Out-of-School youth.

Purpose

The purpose of this policy is to **rescind and replace** sections **(B) Funding ITAs** and **(I) Modified IEP/Subsequent ITA only** of **Policy #07-06**. All other components of POL #07-06 remain unchanged and in effect.

Provision

As of the effective date of this policy, CDO Workforce One-Stop Career Center staff will follow the following guidelines for funding initial and subsequent ITAs for eligible, enrolled WIA customers.

- **Funding ITAs**

The funding levels and duration of ITAs or contracts for training services shall be determined on a case-by-case basis and shall be limited to the needs identified in each customer's Individual Employment Plan or Individual Development Plan for enrolled Out-of-School Youth.

When awarding an ITA, consideration will be given to why a customer may need an ITA beyond what other resources may be available such as PELL grants, scholarships, severance pay or other resources. Customers may be unable to obtain grant assistance from other sources to pay for their training or may require assistance beyond what is available under grant assistance from other sources to pay for their training. The customer's IEP or IDP will document how other sources of funding were sought prior to the development of an ITA and provide confirmation of funding application. WIA funds are intended to supplement other sources of training grants. Customers should apply for PELL and other available funding resources as soon as a school is selected, upon development of the IEP or IDP and with the approval of the CDO Workforce Training Coordinator.

Funding ITAs

Prior to the Enrollment and Start Date of training, customers will be required to provide a complete list of all costs related to training including, tuition, required textbooks, supplies and required tests for certification to complete training. Parameters of funding are as follows:

- Training will not exceed two (2) years in length;
- The maximum funding level will be based upon the actual cost of the customer's tuition and related expenses, as defined in **Table 1** of POL #07-06, less any financial assistance from other sources, and will not exceed:
 - \$3,000.00 for an academic degree program;
 - \$1,500.00 for a certificate program;
 - \$ 500.00 for other occupational training that does not result in a degree or certificate issued by an educational authority;

- Customers will be required to provide copies of the registered class schedule and proof of required textbooks. Textbooks for non-related coursework will not be funded;
 - Training programs that exceed the amounts listed in Table 1 may be supported under this policy. However, customers will be responsible to find additional sources including other grants, student loans and/or personal funds to pay for the balance.
 - The maximum funding level per ITA may be reduced at the discretion of the CDOWIB if available funding does not reasonably support such expenditures. Currently, the maximum lifetime funding for a customer will not exceed \$3,000.00.
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- **Modified IEP/Subsequent ITA**
A customer may only modify his/her IEP with approval from the Training Coordinator. Second and subsequent ITAs can only be awarded to an individual if approved by the Training Coordinator with justification that supports further training is needed in order for the customer to obtain employment or to advance within his/her current field. Subsequent ITAs will not be authorized for customers who have met the \$3000.00 lifetime maximum funding amount.