

Bay Consortium Local Plan
Attachment 5
Individual Training Account Policy

Bay Consortium Workforce Development Board

Policy Number: 00-02
Effective Date: July 19, 2000
Revised Date: February 1, 2017
Title: Individual Training Account Policy

PURPOSE

The purpose of training is to provide eligible customers with the means to obtain the necessary skills to become gainfully employed or re-employed. This policy is intended to define and establish parameters for Individual Training Accounts (ITA) and On –The – Job Training (OJT) development and expenditures.

REFERENCE

Workforce Innovation and Opportunity Act of 2014 Section 129(c) (2)(D);

20 CFR 680.230; and

20 CFR 681.550

BACKGROUND

WIOA Title I-B training services for WIOA eligible adults, dislocated workers and youth are provided through ITAs. Using ITA funds, WIOA eligible adults, dislocated workers and youth purchase training services from eligible training providers they select in consultation with a WFC career planner. Participants are expected to utilize information such as skills assessments, labor market conditions/trends, and training providers' performance, and to take an active role in managing their employment future through the use of ITAs.

ITAs are allowed for out-of- school youth ages 18-24 (out-of-school youth ages 16-17 are not eligible for ITAs) per WIOA Section 129(c)(2)(D) and 20 CFR 681.550.

POLICY

Fund of Last Resort: WIOA funds are to be used for training only after the customer has been deemed ineligible for assistance from other sources of funds to pay for training, including Pell Grants, or any other federal, state, or local grants available through the One Stop Service Delivery System. WIOA funds may be used to enroll clients in the first semester of classes if the time frame for application and award of other grants preclude enrollment in a timely manner. Case managers shall include documentation of pursued options for alternate funding in the client's file. If eligible for other funding, continued enrollment and training shall be paid for with funds other than WIOA funds.

Dollar limits: The maximum training benefit per customer shall be \$4,000 per program year. This limit does not include funds required for accommodations for disabilities, such as interpreters, but includes only the fees for tuition and supplies directly applicable to training and employer reimbursement for on-the-job and/or customized training. Exceptions to the maximum training limit may be granted with prior approval. Consideration of an exception requires the submission of a written request presenting documentation and rationale. Exceptions up to \$6,000 per customer in any one program year may be approved by BCWDB staff. Exceptions over \$6,000 require the approval of the Executive Director.

Duration: Customers must complete training funded with WIOA funds within a 24-month period from the time training begins. BCWDB staff may approve exceptions to this time limit for clients in degree programs for occupational training to respond to shortages in the community.