

## **Mountain Area Workforce Development Consortium Individual Training Accounts**

Individual Training Accounts (ITAs) are authorized under the Workforce Innovation and Opportunity Act and will be issued by the WIOA service provider located in the integrated NCWorks Career Center's delivery system to eligible individuals. The ITA is an account established on behalf of an eligible individual and will be funded with Youth, Adult or Dislocated Worker funds authorized under Title I of the WIOA. ITAs will be issued to eligible individuals who may select a program of training services that are directly linked to employment opportunities either in the Mountain Area Region or in another area to which the individual is willing to relocate. An ITA is only established when the training lasts six months or more, leads to a recognized credential, and is considered long-term.

The Individual Training Accounts place training choices in the hands of the customer. Customers will be able to select high quality training on their own. The list of eligible training providers may be found on the Internet at [www.ncworks.gov](http://www.ncworks.gov). The WDB will certify vendors of high quality relevant to the labor market demands. Customer information about eligible training providers will be made available to all training seekers through the NCWorks Career Center system and service providers.

In order for an individual to be eligible to receive the ITA, the following process will be followed for all WIOA long-term training participants:

- The individual must first seek employment through the Core services, and, if necessary, through Intensive services.
- If these services have not resulted in employment, a discussion will occur regarding training strategy with the case manager or employment counselor.
- The discussion will include a review of employment and training interests and the results of any recent assessments or test scores obtained as part of the intensive services received by the individual.
- The individual should be enrolled in the ACT WorkKeys online tutorial program and will be encouraged to complete the WorkKeys assessments for the NC Career Readiness Certificate by the end of the training period.
- The case manager and client will develop an Individual Employment Plan (IEP) including goals and objectives.
- The case manager will provide information regarding the Individual Training Accounts and discuss with the individual his/her responsibility regarding the ITAs.

- ▶ A review of the labor market information will be conducted, by either the individual, the case manager, or both, to determine that the occupation selected is in demand and that employment opportunities exist in the area.
- ▶ A review of the statewide list of eligible training providers registered in NCWorks will be conducted to determine the provider's requirement for enrollment, performance outcomes, and cost for the training course selected.
- ▶ A financial award analysis form will be completed by the case manager to determine the financial needs of the applicant and to determine if the applicant has previously applied for or is currently eligible or receiving financial aid. The case manager will then develop a cost estimate for the student to attend college in the selected curriculum to be assured that an over award of funds has not been made to support the student. Coordination of WIOA and Pell Grants is required and if an over award is identified the Pell Grant will be applied first to the cost of the training.
- ▶ A visit to the training provider's campus or training location to apply for enrollment into the selected curriculum, apply for the Pell Grant and other sources of funding, if available, will occur before issuance of the ITA.
- ▶ An ITA application will be completed to include a demonstrated commitment to complete the training, knowledge of job requirements, knowledge of training course(s), and availability of jobs in the area. The application will include a list of costs for tuition, required books, and the cost of required fees. Required Occupational Supplies (uniforms, shoes, tools, exam fees, etc.) may be supported with up to \$500 in funding from the ITA after the WIOA participant engaged in the long-term curriculum training has completed at least one semester of training successfully and with a grade level sufficient to assure the continued participation in the training program.
- ▶ The individual must agree to make reimbursement to WIOA for applicable costs covered by other grant assistance should an over-award of resources be identified after the application process.
- ▶ After the ITA is approved, the individual must contact the case manager on a regular basis to report on training progress. In addition, they must sign an agreement to provide attendance information, grades and/or progress reports while enrolled in WIOA approved training activities.
- ▶ After completion of the training, the individual must provide documentation of completion to the integrated NCWorks Career Center WIOA case management staff and utilize the resources available through the center for job placement services if needed.

- After employment is obtained, the individual must contact the NCWorks center, which provided case management during the duration of WIOA supported training and provide the case manager with the name of the employer, wages/salary, and benefits information.
- Agree to participate in follow-up activities to determine employment retention and wages nine months to one year after employment and at other designated intervals after employment.

The approved and designated WIOA service provider will be responsible for managing the Individual Training Account voucher system in the integrated NCWorks Career Center. The WIOA service provider will assist eligible individuals with the purchase of a training program that meets the individual's training needs as evidenced by supporting documentation in the participant's permanent file.

Payment for training costs will be coordinated with any payment of training cost by other grant assistance. The WIOA service provider will be required to abide by contractual requirements, as well as Federal, State, and local policies and procedures. The WIOA service provider will be required to track expenditures of resources by individuals to ensure that individual accounts are not over awarded through WIOA Title I funds for the ITA. Only training providers that are on the NCWorks list of eligible providers may be reimbursed under the ITA training vouchers.

Individual Training Accounts may not be used to provide training under three conditions as follows:

- When the services provided are on-the-job training or customized training;
- When the local workforce development board determines that there is an insufficient number of eligible providers in the local area to accomplish the purpose of a system of ITAs, and
- When the local workforce development board determines that there is a training service program of demonstrated effectiveness offered in the area by a community-based organization (CBO), or another private organization, to serve special participant populations that face multiple barriers to employment.

a) Dollar Limits

In order to provide opportunities for as many adults and dislocated workers as possible, the Mountain Area Workforce Development Board will issue Individual Training Accounts in the amount not to exceed \$1,750 per semester and up to \$3,500.00 per year for a one year diploma/certificate program to include the fall, spring and summer semesters. For a two-year curriculum program, the amount will not exceed \$7,000.00 for the two-year period. If needed, an extra \$1,000 will be provided under the ITA if an extra semester is required to successfully complete the training program for an Associate's or Bachelor's Degree. Training funds support the cost of tuition and the following fees: Student Activity Fee, Technology Fees, Student Accident Insurance and other fees as required by the college and required books for the approved course of training. ITA funds may also be used to support the cost of fees for certification exams upon completion of training or in order to continue training. The case manager and the training institute will maintain appropriate records to ensure that the trainee does not receive an

over-award of funding. The case manager will also monitor the progress of the trainee to insure a 2.0 grade point average is maintained before funding is continued each semester.

Those WIOA participants served by NCWorks Centers in Madison and Transylvania Counties, that are in need of long-term training, will be referred to the nearest comprehensive workforce office in the Mountain Area's four-county region. For Madison County, participants shall be referred to the Buncombe County comprehensive one-stop site (NCWorks Career Center- Asheville) and for Transylvania County; referrals shall be made to the comprehensive one-stop located in Henderson County (NCWorks Career Center in Flat Rock).

(b) Time Limits

The ITA will be issued on a semester basis, with training to be completed within a 2.5 year period for curriculum programs. The individual must meet the attendance and academic requirements on a semester basis in order to be certified for continued funding under the ITA policy. The case manager will review the trainee's progress and encourage completion of the training within the required time limit.

(c) Degrees or Certificates Allowed

The Mountain Area Workforce Development Board has approved the one-year certificate and diploma programs and two-year occupational courses of study leading to an Associate degree offered through the community college system and other training institutes that offer occupational skill training. The occupations approved for training must be in demand in the local labor market with self-sufficiency entry-level wages and potential for increased earnings.

On a case-by-case basis, the WIOA training counselor may request the sponsorship of eligible WIOA training participants that have demonstrated a strong ability to complete a Bachelor's Degree within the 2.5-year time limit.

The request for sponsorship with WIOA funds shall be made to the Workforce Development Director and will include evidence of the potential long-term training participant's completion of curriculum courses as required for the attainment of a Bachelor's Degree, the courses remaining to complete the degree program, the selected training provider (must be listed on the eligible providers list in NCWorks), the accreditation standards of the proposed training provider and any other information requested in order for the Director to make an informed decision regarding the individuals' ability to complete the training successfully within the 2.5-year time period. Upon approval, the WIOA training participant will comply with all directives to maintain contact with the WIOA training counselor in order for WIOA support to continue for the duration of the training period. All other provisions of this policy apply as well.

(d) Procedures for Determining Case-By-Case Exceptions for Training that May be Allowed.

The Workforce Development Board provides flexibility so that the case manager may request exceptions to the cost and time limit for training. The request should be made on a case-by-case basis by the case manager and must be based on the individual's needs and circumstances. The request for an exception may include but is not limited to the following issues: the individual must work to support family; limited UI benefits available to the individual; the individual is not eligible for the Pell Grant or other grants or scholarships; family obligations; illness, circumstances beyond the control of the trainee; limited funding available to the Consortium and other exceptions as identified by the case manager. The case manager must present documentation that warrants the request for the exception. The request for the exception will be discussed with the NCWorks office training coordinator and approved by the Workforce Development Director.

(e) Period of Time that ITAs will be Issued

ITAs will be issued on a semester basis at a level not to exceed \$1,750 and the ITA will not exceed the allowed amount of \$3,500.00 per year or \$7,000.00 for the two-year period. The case manager will review the ITA at the completion of each semester and issue an ITA for the cost of the upcoming semester, as the need is determined and upon determination that the grade standard is sufficient to continue training supported with WIOA funds. If necessary, an additional \$1,000 will be allowed for the ITA if an extra semester of training is needed for the WIOA participant to complete the training program successfully bringing the total approved amount of the ITA up to the maximum amount of \$8,000.