

Southwestern Local Area

SUBJECT: Individual Training Account Policy

PURPOSE: To Establish Policy for WIOA ITAs

Local Area's ITA

ITAs may be issued upon enrollment into a training component.

- The dollar limit: \$3,500.00 per WIOA program year.
- No more than \$10,500.00 in ITAs may be spent on any single individual.
- Time limits: expires at the end of a program year.
- Degrees, diplomas or certificates allowed: Community college certificates, diplomas or associate degrees and bachelor's degrees are permitted with certain conditions.
- Exceptions to the training length/cost allowed: Only on approval by the Workforce Development Administrator.
- Length of training and cost allowed are always subject to exception on a case by case basis approved by the Workforce Development Administrator.
- For what period of time are ITAs issued? ITAs are issued for a school semester.

In accordance with the Local Area's policies and procedures, training services shall be provided to eligible adults and dislocated workers through Individual Training Accounts (ITA) issued through the NCWorks Career Centers. The ITA is an account established on behalf of a Title I customer to assist with the cost of training (tuition, books and fees) offered by an approved training provider. The ITA shall have a maximum training participation value, per individual, of \$10,500.00 with authorizations issued for a program year based on tuition, fees, and estimated book costs. Authorizations shall not exceed \$3,500.00 a program year unless prior approval has been received from the Workforce Development Administrator.

A financial award analysis form will be completed by the WIOA Specialist 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.

Case Managers along with the Fiscal Unit Staff will be responsible for tracking of training costs to assure that the authorizations and expenditures do not exceed the \$10,500.00 participation limit. This amount will continue to be reviewed annually based on current credit hour rates within the North Carolina Community College System and private training providers and is subject to further adjustment. Individuals must satisfactorily meet attendance and academic requirements of the training providers and comply with the terms of the Local Area's Individual Employment Plan (IEP) to be considered for continual funding.

Any course of study must be on the approved curriculum list of the Local Area. If an area of study is not on the approved curriculum list, permission must be received from the Workforce

Development Administrator before issuing an ITA. The Local Area's ITA may be used for Associate Degree, diploma, and certificate programs that are supported by PELL grants. In addition, in cases where an individual is within two years of completing his/her Bachelor degree, an ITA may be established with prior approval from the LA Workforce Development Director. Although the course of study may be approved, the value of the individual's ITA will remain the same.

EFFECTIVE DATE: IMMEDIATE

EXPIRATION: INDEFINITE

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