

Appendix B



INDIVIDUAL TRAINING ACCOUNT (ITA)

Approval Date for City of Cleveland and Cuyahoga County WIB: 11/19/10

ITA POLICY

The purpose of this policy is to establish the guidelines for ITAs for the Employment Connection Agency. The WIB and Executive Director of Workforce Development reserve the right to make modifications to this ITA Policy as needed. The local parameters for ITAs are listed below and are subject to individual review on a case by case basis:

1. A customer who has been determined eligible for WIA training services may select a training/educational provider from the STATE/LOCAL listing with the approval of an Employment Specialist who will consider a range of factors including but not limited to provider performance, proximity and cost.
2. An ITA will be issued per the demand occupation policy or in a case where Employment Connection (EC) can certify that a job opportunity exists.
3. Training must be in occupations identified as 'growth' or demand occupations identified as 'emerging, with the potential for growth' as defined within the demand occupation policy.
4. Training should be directly related to achieving an employment placement outcome. The employment outcome must be occupation specific. For example if the employment goal is "To become a Truck Driver" obtaining Truck Driver training Certification and a CDL license is appropriate.
5. ITAs should not exceed two years. Requests should include evidence that financial support, beyond WIA, is available during extended training periods. An ITA may be withdrawn if a customer fails to maintain at least a "C" average or does not meet the training institution's good standing status.
6. In order to be approved to receive an ITA, an individual must be suitable for the training referral, job ready by the completion of training, suitable for employment by the end of the training, and able to achieve levels in reading and math required by the targeted employment occupation. After the completion of occupational training, if the customer is not employed, he/she is required to continue job search activities through the Employment Connection. If the customer fails to actively engage in job search activities, the Employment Connection reserves the right to seek restitution (see clause 16 below).

7. All applicants shall apply for the Pell Grant and/or the Ohio Institutional Grant if the training desired qualifies for these types of grants. Depending on need and the availability of WIA funding, Pell funds may be combined with other funding (i.e., TAA, veterans, TANF, HUD E&T, incumbent worker (including, but not limited to workers effected by potential layoff prior to official notice) to cover total expenses. An applicant must apply for Pell funds prior to the beginning of training and submit confirmation of the application. These funds can be applied for electronically using the Internet or the Workshop facilitated by EC staff or partners.

8. Funding may be considered for college level programs under the following conditions:
 - a. Satisfaction of a certificate or degree is required upon completion.
 - b. Customers must demonstrate that they have the financial resources to support themselves while in training.
 - c. Customers must agree to and sign the Sponsorship/ITA agreement.
 - d. Customer must agree to job placement assistance upon the completion of training.
 - e. An ITA may be issued based upon the following criteria:
 - i. Customers that completed the majority of their coursework towards a bachelor or master level program [one year from completion with a GPA of 2.0 or better for bachelor level programs and a GPA 3.0 or better for graduate level programs].
 - ii. Customers must complete within 104 weeks including the summer sessions.
 - iii. Customers who have completed previous coursework, with an overall GPA less than 2.0, will be placed on academic probation for the 1st sponsored semester and evaluated each semester for future funding. Customer must obtain a GPA of 2.0 for any sponsored semester (see number 5 above).

9. Continuing Education and other similar courses may be allowed only if the following conditions apply:
 - a. The customer must have a specific employment offer.
 - b. The customer has a work history or educational background that is related to the employment opportunity.

10. The customer must present evidence as to how the proposed training will result in steady employment, earning a wage that leads to self-sufficiency. Training

that leads to an annual wage below the WIA performance measures for Adults and Dislocated Workers must show career pathway progression.

11. An ITA will not be used for payment of late fees caused by customer error or delay. The customer will be responsible for these items, as they are responsible for other fines or penalties or any other outstanding charges.
12. ITA Funding parameters are as follows:
 - a. **\$6,000** maximum for WIA-funded training. Additional funding may be available (i.e., TAA, VSTP, TANF, HUD E&T) and will be approved based on each source's established provisions.
 - b. Customers are eligible for ITA training in one occupation. Multiple ITAs may be approved if training is related to one occupation.
13. ITAs may be utilized for expenses related to training, including but not limited to the following: books, tuition and fees, supplies, tools, certification, licensing, testing fees, physicals for entrance into training (if not covered by customer's medical insurance), medical requirements for training entrance (if not covered by customer's medical insurance), etc. All amounts for these expenses are included in determining the total amount of the ITA and cannot exceed the ITA established maximum defined in 12a. Health insurance is not an allowable expense.
14. If the cost of training exceeds funding limitation guidelines, Employment Specialists should assist in developing a financial plan to cover total costs of training. In some circumstances, customer may be required to apply for or access student loans or incur personal debt as a condition of participation.
15. Due to limited funding in the WIA formula adult and dislocated worker allocations, ITAs will only be approved for qualifying adults if an employer commitment to hire the individual exists, or in the case of Dislocated Workers all of the following requirements are met **and these requirements supersede all others outlined above:**
 - the training will not exceed one year in duration and must result in program completion;
 - the maximum ITA amount will be \$6,000. The trainee is responsible for all costs above the \$6,000 amount;
 - the training institution will accept the performance payment points identified in the Policy for Agreements and Payments to Eligible Training Providers policy, unless they are a public institution.The ITA must be in compliance with the other parameters of this policy. Exceptions will be made in the event a commitment to train individuals was

made as a part of a non-WIA grant with the approval of the Executive Director, or his/her designee.

16. Employment Connection reserves the right to seek restitution and damages in cases of misrepresentation, fraud, non compliance or abuse of funds.