

TRIDENT

Trident Workforce Investment Board Workforce Investment Act

INDIVIDUAL TRAINING ACCOUNT (ITA) POLICY

TO: SC Works Trident Operators and Youth Contractors

ISSUANCE DATE: August 12, 2014

EFFECTIVE DATE: July 1, 2014

SUPERSEDES: May 15, 2012, February 14, 2012, August 9, 2011, July 27, 2011, March 31, 2009, October 7, 2008, May 10, 2007 and August 14, 2001

SUBJECT: INDIVIDUAL TRAINING ACCOUNT (ITA) POLICY

PURPOSE:

The purpose of this policy is to establish limits, guidelines for administering, and monitoring training vouchers to Adult and Dislocated Workers.

POLICY:

In accordance with the Workforce Investment Act (WIA) of 1998, the Trident Workforce Investment Board will provide training to WIA eligible Adults and Dislocated Workers using Individual Training Accounts (ITA) with Eligible Training Providers.

PROCEDURES:

WIA Adult and Dislocated Worker eligible customers will be provided ITA's in accordance with procedures, issued by the Trident Workforce Investment Board. The Board has determined that WIA eligible customers will be provided ITA's in an amount of \$6,000 for WIA Adult and Dislocated Worker Customers for a lifetime maximum for training in areas documented as In-Demand or when a firm offer of employment exists.

The Executive Director of the Berkeley Charleston Dorchester Council of Governments (BCDCOG) has discretion to exceed the \$6,000 amount as needed in certain cases. The Executive Director will notify the TWIB of these cases at their next regularly scheduled meeting following the action.

SC Works staff must ensure only those training programs/courses included on the current local and state Eligible Training Provider (ETP) lists are offered as training options to WIA customers. If a customer wishes training in a program/course not included on the current ETP list, a written request for the inclusion of the training program/course must be submitted to the WIA Project Officer and the

Workforce Specialist who must determine if the occupation is an in- demand occupation. No guarantee of training, either verbally or written, should be given to customers until the course is officially included on the ETP list.

To ensure optimum customer choice, Workforce Specialists will provide customers with the necessary performance data on all Eligible Training Providers through accessing the SC Department of Employment and Workforce website. In addition, they will provide customers with labor market information from www.scworks.org.

In accordance with WIA Regulations Section 663.320, SC Works operators must coordinate training funds available and make funding arrangements with SC Works partners and other entities.

The following items will be included in the Individual Training Account (ITA) budget for the WIA Adult participants, which have a maximum training amount of six thousand dollars (\$6,000) for a life-time of the WIA program:

Tools
Uniforms
Books
Exam fees
Drug screens required by the provider
Background checks
Exams fees not attached to a funded WIA training

Reimbursement: In the cases where it is necessary for a customer to pay upfront for services, reimbursement may be allowed provided customer presents dated receipts to match request and if applicable, attendance sheets. Berkeley Charleston Dorchester Council of Governments will provide reimbursement within thirty (30) days from date of information is received.

NOTE: Youth Contractors are not required to use the Eligible Training Provider List or to obtain an ITA number from the administrative office. However, youth are bound to follow all other requirements of this instruction.

The following instructions are provided to assist in completing the information for a training service budget and must be followed in order to receive ITA #.

1. After being determined eligible to receive training services, the customer is given a package containing the training services budget (TSB).
2. The customer is to take the training services budget to the financial office of the eligible training provider chosen for their training.
3. The training provider's academic/student counselor, financial aid officer, or other authorized person must complete and sign the training service cost items section of the training service budget to document the accuracy of the information (worksheets are provided and if used information must be transferred to the budget).
4. Once all information in the training service cost item section is complete the customer will return the form to their Workforce Specialist.
5. The Workforce Specialist will complete the remainder of the training services budget (TSB, a worksheet is provided and if used information must be transferred to the budget). The Workforce Specialist must sign the training service budget. The Workforce Specialist signature signifies the accuracy of the information, the provider as well as the program chosen is on the eligible training provider list, they have researched to the best of their ability any other costs

that may be incurred which are not included in the training costs from the training institute such as licenses or uniforms, and any additional funding sources noticed by the training institution i.e. TAA, NEG, etc.... , and The case manager must ensure that an application for Pell and Lottery funds has been submitted, submission is not optional. The customer's file must contain documentation that shows the application for all available funding if their program is on the eligible.

6. Once the Workforce Specialist is satisfied that the TSB is complete, they will review the training services budget information with the customer being sure to explain that funds from WIA are limited (\$6,000 lifetime maximum based on training program meeting in-demand requirements).
7. If the training is over the maximum lifetime limit, the Workforce Specialist must determine on per semester or quarterly basis the customer's portion. The customer will be responsible for paying his/her portion every semester or quarter prior (proof of customer payment should be maintained in the file) to any WIA vouchers being released.
8. The customer must sign to verify that they understand the training services budget information and the amount of funds that will be provided to them by WIA. The customer should be given a copy of the budget for their records.



Ronald Mitchum, Executive Director
BCDCOG

August 12, 2014

Date