

Region VI Workforce Development Board 17 Middletown Road White Hall, WV 26554	Classification: Individual Training Account Scholarship Policy
	Date May 10, 2019

Region VI Guidance Letter No. 5-15, R--5

To: All Region VI WorkForce West Virginia Centers- Managers and Staff
All Career Planners/Eligibility Determination Staff
All Youth Subcontractor staff
All Local Approved Service Providers

From: Region VI Workforce Development Board, Inc. (WDB)

Subject: Individual Training Account (ITA) Scholarship Policy

Purpose: This policy outlines the process for the Individual Training Account (ITA) system, (referred to as an Individual Training Account Scholarship in Region VI), established under the Workforce Innovation and Opportunity Act of 2014 (WIOA), to purchase training from a certified eligible provider of training services for adults, dislocated workers, or out-of-school youth who qualify for training services.

References: Sections 134, 181 of the Workforce Innovation and Opportunity Act and 20 CFR Part 680, and 681.550.

Background: The Workforce Innovation and Opportunity Act identifies the Individual Training Account as a means of providing training to individuals. The ITA system should be designed to provide customer choice within guidelines established by the local Workforce Development Board.

Policy: Region VI will not fund training for an individual who has obtained a Master’s degree or better.

Region VI will not fund training for an individual who has obtained a certification/license, 2-year associates degree, or 4-year or more college degree from an accredited training provider, unless the training is supported by the Career planner and has been approved by the Exceptions Committee of the Region VI WDB. The provisions of #8 in this policy apply to this circumstance.

ITA Scholarship funds will only be obligated based upon Region VI funding levels at any point in any program year. Reductions in funding at any point, in any program year, may reduce, and, or eliminate ITA Scholarship obligated funds.

Eligible participants will be required to pass a 10-panel drug screening required by Executive Order of the Governor of the state of West Virginia (effective 7/16/12) before WIOA ITA Scholarship funds can be released.

The Region VI Workforce Development Board has established the following guidelines to be used when implementing ITA Scholarships:

1. ITA Scholarship’s will be issued to eligible participants for a maximum training period of 12

months at a time, not to exceed 24 months.

2. In the event a participant is approved for a course of training, which will take 13 to 24 months to complete, it is the responsibility of the participant to re-apply with their WIOA Career Planner for additional WIOA funds necessary to cover the costs of completing their training by the first day of the 12th month of their training.
3. WIOA funds obligated to cover training costs shall be in accordance with the following fee structure:
 - Maximum of \$4,000.00 for 0-600 clock hours of training (training time 6 months or less) *
 - Maximum of \$6,000.00 for 601-1200 clock hours of training (training time over 6 months to 12 months) *
 - Maximum of \$8,000.00 for 1201-1800 clock hours of training (training time over 12 months to 18 months) *
 - Maximum of \$10,000.00 for 1801-2400 clock hours of training (training time over 18 months to 24 months) *

The tuition levels outlined above will be awarded based on the course information entered in the MACC by the Training Provider.
4. Funds will cover required costs, including tuition, fees, books, supplies, tools and special equipment.
5. Participants who begin training prior to receiving an ITA Scholarship may be covered by Region VI (subject to the availability of funding), if the following conditions are met prior to the training start date:
 - Participant has been issued a Conditional WIOA Funding Voucher by a Career Planner
 - Participant has maintained WIOA eligibility
 - Participant has been tested and assessed
 - Participant has completed the research assignment
 - Participant is currently enrolled and not changed his/her original training plan.
 - Participant has maintained satisfactory academic progress and is in good standing as determined by the service provider.
6. Customers who receive a Conditional WIOA Funding Voucher that has expired prior to receipt of WIOA funding will be eligible to apply for second year funding.
7. The training provider and participant shall document other sources of funding on the ITA Scholarship form.
8. Participants will be limited to one (1) WIOA funded ITA training opportunity in a three (3) year period. (“Training opportunity” means the customer started a training program and WIA/WIOA funds were utilized to pay for the training, and the customer may or may not have successfully completed the training program.) The three (3) year period begins on the date the individual completes/separates from the training program.

Should a customer request a second WIOA funded ITA training upon expiration of the 3-year time limit, the request must be submitted to the Exceptions Committee for consideration. The following must occur before the request can be submitted for consideration by the Exceptions Committee:

- The customer must meet current WIOA eligibility guidelines; and
- The WIOA Career Planner must recommend and provide appropriate documentation justifying the funding of a second training.

The preceding guidance pertaining to 1 WIOA funded training opportunity in a 3-year period or requesting a second WIOA funded training upon expiration of the 3-year time limit, will **not** apply to:

- ✓ Customers who have participated **at the request of an employer** in a WIA/WIOA-funded, Customized, Incumbent Worker, Transitional, or On-the-Job Training program. Those customers will be assessed by a Career Planner, on an individual basis, to determine if they are eligible for additional WIOA funded training through an ITA Scholarship without having to go through the Exception's Committee for approval.
- ✓ Customers who have completed a Pre-Apprenticeship program who want to participate in an Apprenticeship may still be eligible for that training without having to go through the Exception's Committee for approval. Assessment and support of the Career Planner for the customer to be funded for the Apprenticeship must still be done.

9. A degree or certificate must be obtained upon completion – not to exceed Bachelor's level. A degree or certification must lead to a demand occupation as defined here:

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For purposes of awarding a WIOA ITA Scholarship, a Demand Occupation will be defined as:

- A. Occupations listed on the current list of West Virginia Demand Occupations for Workforce Development Area 6; OR
- B. Occupations showing a minimum of 2% growth rate on the current list of Long Term West Virginia Demand Occupations for Workforce Development Area 6; OR
- C. Occupations showing a minimum of 25 projected openings and/or 25 replacement openings on the current list of Long-Term West Virginia Demand Occupations for Workforce Development Area 6; OR
- D. Occupations which do not fall under A, B, or C above, but which the DOL/ETA are funding training for through National Dislocated Worker Grants (NDWG).
Additionally, for purposes of funding WIOA On-the-Job Training (OJT), Customized Training, Transitional Training, or Incumbent Worker Training, any or all of the above may apply, plus:
- E. Documentation of support employment in the OJT, Customized Training, or Incumbent Worker Training occupation following completion of training.

- 10. Individual Training Account Scholarships will be issued to residents of Region VI, with residency being verified through a WV Drivers License, State ID Card, or other document(s) which can verify current residency in the Region VI service area. Services can be offered to Dislocated Workers who are laid-off from a company located in Region VI, but who reside in another state/region as long as they are not receiving WIOA benefits from their state of residence.
- 11. Individuals changing programs will not be eligible for WIOA funding nor will the costs of any repeated course(s), lost books, etc. be borne by WIOA, unless extraordinary circumstances are involved and a re-assessment is conducted by a Career Planner recommending the change and documenting the reason for the change. * See Attachment B for further guidance.
- 12. The participant will be required to apply for a PELL grant if attending a training provider that participates in the PELL grant program. WIOA funds will then cover any tuition and approved costs not covered by PELL, not to exceed the current cap.
- 13. Service Provider should notify the appropriate Career Planner within seven (7) days of all withdrawals/completions (successful or unsuccessful).
- 14. Participants must adhere to the Region VI WDB attendance policy of either 80% of the instructional hours, or the training provider's attendance policy, whichever is higher. If this attendance policy is not being met at any time during the approved training time frame, the Region VI WDB may, at their discretion, terminate the funding of the participant failing to

meet the attendance requirement.

15. Participants must maintain satisfactory academic progress as defined by the policy of the training provider institution they are attending. In the event this progress is not maintained, the participant may lose their status as a WIOA funded student.
16. In accordance with the Americans with Disabilities Act, eligible WIOA participants with special needs may request reasonable accommodations to be made by service providers (i.e. – special textbooks, equipment, etc.) in order for the participant to be able to complete course requirements during training.

Region VI may provide referrals for technical assistance to Service Providers and participants in meeting the requirements of ADA. Any requests for assistance above and beyond technical assistance must be submitted by the Career Planner on behalf of the participant to the Exceptions Committee.

17. There is no limit to the number of times an ITA may be modified. A modification to an ITA may be made by request of the training provider to the Career Planner, which then must be approved by the Career Planner (but only if the modification request does not involve changes in the funding level of the ITA). If the requested modification involves a change in the amount of funding, the Career Planner must submit the modification request to the Region VI WDB for final approval. No modification to the ITA involving changes to the funding level can be made until approved by the Region VI WDB.

The Region VI Workforce Development Board Executive Director may waive provisions of this policy when the Executive Director determines it is necessary in order to serve individuals with special circumstances.

Action: The Region VI WORKFORCE West Virginia System will be made aware of this policy. This policy will be sent to each Training Provider and a copy given to each WIOA participant.

This policy will become effective May 31, 2018. and shall be in effect until revised or cancelled by the Region VI Workforce Development Board.

Disclaimer:

This policy may be subject to change as additional federal regulation and TEGLs and or state policies are released that are contrary to or otherwise different from Region VI WDB's interpretation of WIOA.

Attachments:

A- Online Courses

B- Changing training

ATTACHMENT A TO THE REGION VI WDB ITA POLICY, REVISED (5/28/13)

1. Region VI will approve only those online courses meeting all initial and or subsequent eligibility requirements per the Workforce Innovation and Opportunity Act, and who have a physical presence in Region VI, which would allow for students enrolled in the online course to be able to participate in face-to-face discussions with a representative of the training provider offering the online course in the event the student needs assistance in completing the requirements of the online course.

In addition, online courses which require an externship will only be approved if the training provider provides placement assistance in and monitoring of the externship through a physical presence in Region VI.

2. Payment of tuition for online courses will occur as follows:
 - ❖ At initial enrollment, reimbursement, not to exceed 50% of the tuition costs as outlined in the participant ITA, will be paid to the training provider.
 - ❖ The remaining 50% reimbursement will be made upon completion of a minimum of 50% of the clock hours *or 50% of the course material (however the training provider tracks the students progress in the online course)* required to complete the online course within the length of time allotted by the training provider to complete the course. (Example – The course requires completion of 400 clock hours of instruction and or 20 skill sets tests, to be completed w/in 6 months, with an additional 6 months allowed for completion, for a total of 12 months. In order to be paid the remaining 50% tuition costs, the student would have to have completed 200 clock hours *or passed tests or submitted homework showing 10 of the skill sets were completed* by the end of 6 months after enrollment.) If a student does not complete the *50% clock hours and or course requirements as documented by the training provider* according to the timeline stated above, Region VI will not be responsible for the remainder of the tuition, and the training provider must deal with the student to collect payment. Any exception will be considered under existing ITA policy.
3. The cost of computers and/or operating systems software will not be absorbed by Region VI as part of the tuition fee of any course, whether online or traditional.
4. The cost of program software which is the basis for the learning experience of the course may be treated the same as the cost of a textbook and may be covered in the tuition fee of an online or traditional course.

ATTACHMENT B – CLARIFICATION OF POLICY ON CHANGING TRAINING PROGRAMS

1. In the event a program change is requested by the training provider (due to extraordinary circumstances*), a reassessment and discussion with the Career Planner is required. If both the Career Planner and the training provider are in agreement in allowing the change, the change can be granted by the Career Planner provided that the cost of the program stays at or below the original approved ITA amount. Documentation of the change will need to be placed in the participants file, and notification sent to the WDB office. This will also require changes to the MACC and a new ITA voucher will need to be issued.
 - * Extraordinary circumstances should not include someone who simply does not like the program that they are in and would like to change. Extraordinary circumstances may include someone who has attended class faithfully, who has made an effort to attain their original goal, but for some reason does not have the ability to complete said program successfully and wishes to move back to a lesser program in order to complete successfully.
2. If a change in program occurs, the Career Planner will complete/separate the participant from the original program as a voluntary separation/re-enrolled by the same training provider and add a case note indicating that the individual has transferred into another program. A second enrollment into the new program will be entered and a new ITA prepared.
3. The training provider will be required to include the non-completion of the original program on their subsequent eligibility application performance information.
4. If a change occurs due to the original school closing, the Career Planner will complete/separate the participant from the original program as an involuntary separation/re-enrolled to a different training provider and add a case note indicating the reason for the change. A second enrollment into the new program will be entered and a new ITA prepared.
5. If the request for transfer is denied, the training provider may appeal the decision to the exceptions committee. The request for change, along with the Career Planners decision, should be sent to the Region VI Workforce Development Board, 17 Middletown Road, White Hall, WV 26554, attention: Exceptions Committee.