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PY 2018 LOWCOUNTRY WORKFORCE INSTRUCTION NUMBER 08

TO: Lowcountry Workforce Innovation and Opportunity Act
Contractors/Service Providers/Sub-recipients/One-Stops

ISSUANCE DATE: September 26, 2018

EFFECTIVE DATE: Immediately

REVISION DATE: N/A

SUBJECT: Individual Training Account Policy

EXPIRATION DATE: Indefinite

PURPOSE: The purpose of Training Accounts is to help qualified Individuals obtain and retain employment, which pays enough to support their family. Accounts allow eligible Individuals to select between training providers on an approved list. The Eligible Training Provider List (ETPL) is called Palmetto Academic and Training Hub (PATH) and may be accessed at <https://www.scpaath.org/>. PATH has information about cost, duration, and performance statistics.

REFERENCES: Workforce Innovation and Opportunity Act (Public Law 113-128) §122; Title 20 Code of Federal Regulations (CFR) “WIOA, Final Rule” §680.200-350; §680.740-750; §681.540-550.

BACKGROUND: Eligible Individuals may receive an Individual Training Account (ITA) to help them pay for the costs of necessary training.

POLICY: Training costs are paid with ITA vouchers. Any portion of the total training that is paid with resources other than WIOA Title I Funds (i.e. PELL, Lottery, TAA, etc.), will not count toward the training cap. Supportive services are not included in the training cap. The training cap or maximum lifetime amount of WIOA Training funds that will be paid on behalf of an Individual is Five Thousand (\$5,000) Dollars. If grades are issued, Individuals must maintain a 2.0 grade average or the grade average required by the particular training program of study, whichever is higher. Training accounts cannot be used to repeat a class or course. This lifetime maximum includes Youth, Adult, Dislocated Worker training funded through Individual Training Accounts, Youth Scholarships and On-the-Job Training (OJT) contracts.

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Training Accounts are valid only for the program of study approved by the Lowcountry. Training Accounts are managed by the Workforce Innovation and Opportunity Act system.

Contractors/Service Providers/Sub-recipients maintain records and pay training providers. Training Accounts are not a guarantee for funding. Individuals in training must attend class, make satisfactory progress and meet with their assigned staff member as scheduled. (See Participant Guidelines & Expectations, Satisfactory Progress for Training and Support Services). Training Accounts may be decreased if the area receives a reduction in funding.

Accounts have expiration dates. The maximum duration of a training account is two years. Only training programs that can be completed within two years will be considered for funding.

ITAs may only be issued for training that is on the ETPL (PATH) and approved the Lowcountry.

EXCEPTIONS: Exceptions to the Lowcountry training cap (over-ride) may be made on an individual basis by the Lowcountry Workforce Development Director (WDD), or assignee, taking into account the availability of local funds, the demand for the occupation, the skills/qualifications of the applicant, the applicant's participation record, the length of training, the historical success of the training provider and the over-ride amount needed. The WDD may over-ride the local training cap up to the State Defined Participant Lifetime ITA Cap. Override of the Lowcountry training cap is granted upon approval of the ITA, however any override of the State's ITA Cap must first be approved by the WDD and if approved then sent to the Lowcountry Workforce Investment Board Oversight Committee for a final decision.

Those who receive an ITA, successfully complete their Occupational Skills Training, and are determined to need further assistance in gaining sustainable employment may receive up to an additional Two Thousand Five Hundred (\$2,500.00) Dollars for an OJT.

Additional policy considerations: GED and/or basic skill training is not included in the lifetime ITA cap; an ITA application is not required. However, using the most expeditious and cost efficient means of acquiring these pre-requisites is imperative. Allowing participants to attend training on a part-time basis increases the cost of training and the time it takes to complete training. Therefore, full-time training should be the norm.

An Individual may apply to attend training that costs more than the maximum training account amount. However, such Individuals must submit a budget to show how they will pay the difference.

PROCESS:

Steps to Apply for an Individual Training Account

Assigned Staff will help applicants complete the following steps:

- Utilize services at a One-Stop Workforce Center.
- Work on the immediate steps listed in the Employment Plan.
- Go through an assessment of your skills and interests.
- Review options for training on the Eligible Training Provider List (<https://www.scpa.org/>); the Individual will review the information provided on the anticipated demand for different occupations, wage rates, other consumer choice information such as completion and placement rates, and select the desired Provider and Course of training.
- Apply for financial aid.
- Be determined eligible for training.
 - Complete and interview, evaluation, or assessment and career planning and be determined:
 - Unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through WIOA services;
 - In need of training services to obtain or retain employment leading to economic self-sufficiency or wages comparable to or higher than wages from previous employment and;
 - Have the skills and qualifications to participate successfully in training services;
 - Select a program of training services that is directly linked to the employment opportunities in the local area or the planning region, or in another area to which the individual is willing to commute or relocate;
 - Are unable to obtain grant assistance from other sources to pay the cost of such training, including such sources as State-funded training funds, Trade Adjustment Assistance (TAA), and Federal Pell Grants established under Title IV of the Higher Education Act of 1965, or require WIOA assistance in addition to other sources of grant assistance
 - If training services are provided through the adult funding stream, are determined eligible in accordance with the State priority system in effect for adults under WIOA sec. 134(c)(3)(E) and §680.600.
- Complete an Individual Training Account Application.

ITAs may be submitted up to 90 days prior, but **NO LATER THAN THREE (3) WEEKS PRIOR to the Projected Start Date of the Activity.**

When an Individual Training Account Application is completed, the assigned staff member will email it (.pdf) to Lowcountry Administrative staff, or their assignee, for review. Lowcountry Administrative staff/assignee will notify the assigned staff member of the decision of any deficiencies and/or to fund or not fund the ITA, the assigned staff member is responsible for correcting deficiencies and if necessary re-submitting the ITA. The Assigned staff member is also responsible for notifying the applicant of the decision in writing or in person (case note) as soon as possible, but no less than one week prior to the scheduled start date of the training.

The assigned staff member is responsible for meeting the Individual face-to-face the week before the scheduled start date of the training to confirm the Individual is prepared for training, and is willing and able to attend as scheduled. This meeting will include a review of the Participant Guidelines/Satisfactory Progress, a review of support service needs/award, and pre-requisites for the training to ensure they have been met, and giving the Individual Attendance records and ensuring the Individual understands how to fill them out, how to submit them and when to submit them.

Issuance and Management of Individual Training Accounts

Contractors/Service Providers/Sub-recipients will be responsible for issuing and maintaining Individual Training Accounts. Individual Training Account agreements will be signed by the Assigned staff member (case manager) and the Individual. The agreements will have language that states that awards do not guarantee funding. Should funding for the area be reduced in the future, Individual Training Accounts may be unilaterally reduced. Continued funding for ITA activities are dependent on the progress an Individual makes towards goals set in their Individual Employment Plan/Individual Service Strategy. (See Participant Guidelines & Expectations, Satisfactory Progress for Training and Support Services).

Contractors/Service Providers/Sub-recipients will track the amount obligated with ITA's to ensure the total does not exceed the funds earmarked in their contract for ITA's. Contractors/Service Providers/Sub-recipients will monitor expenditures to make sure Individuals do not exceed the amount set in their agreement. When Individuals complete training or all necessary funds have been expended, Contractors/Service Providers/Sub-recipients will deobligate the remainder of the training account. The financial tracking components of the SC Works Online Services (SCWOS) system must be utilized their full extent and detail.

Contractors/Service Providers/Sub-recipients will make payments to training providers in a timely manner. Before making payments, Contractors/Service Providers/Sub-recipients will make sure attendance documentation and other information is current in SCWOS.

Contact

Questions regarding this instruction should be directed to Shelly Campbell, scampbell@lowcountrycog.org, Lowcountry Workforce Investment Area, Lowcountry Council of Governments, Post Office Box 98, Yemassee, SC 29945.


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