



West Tennessee Workforce Development Board

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Craig S. Butler
Board Chair

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Local Workforce Development Area 11 Policy Memorandum # 17-11

Subject:

Individual Training Accounts (ITA)

Purpose:

The purpose of this memorandum is to establish the policy of LWDB-11 regarding Individual Training Accounts for individuals enrolled in the Workforce Innovation and Opportunity Act (WIOA) who are attending post-secondary training.

References: WIOA Section 134(c)(3)(F)(iii); WIOA Section 3(7)(B); 20 CFR 680.320(a)(3); 20 CFR 680.340(f); WIOA Section 122(d); TDLWD AJC Individual Training Account Use Guidance

Background: WIOA identifies the Individual Training Account (ITA) as the primary means of providing training to eligible individuals (as defined by the Workforce Innovation and Opportunity Act) and who are not able to obtain grant assistance from other sources or require WIOA assistance in addition to other sources of grant assistance. The ITA system is designed to provide customer choice within the guidelines established by the LWDB-11.

Policy:

The West Tennessee Workforce Development Board in LWDA-11 has established the following guidelines regarding the authorization of funds through Individual Training Accounts, **if funds are available:**

- ITA Limitations
 - A maximum of \$3,500 in WIOA funding may be available in a twelve-month period with a maximum of \$7,000 available over a 24-month period to be used for tuition, fees, books, and required supplies.
 - If other financial assistance is available (excluding loans), it must be applied to **tuition, fees, books, and supplies** prior to WIOA funds being expended. Should other financial assistance not yet be in place at the time of enrollment into the training, WIOA funds may be issued to cover cost of books and supplies.



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- Fund Distribution
 - WIOA funding will be authorized for a period of a maximum of two years of training for necessary unmet needs for the training taking into account that WIOA funds are available.
 - WIOA funds will be issued at the beginning of each new term of the program of training.
- Types of Training Allowed
 - Training must be in a demand occupation area within the West Tennessee area.
 - WIOA funds will only be issued for training in programs that are listed on the state Eligible Training Provider List (ETPL).
 - "Career Pathway" programs that lead to improved employment opportunities.
- Non-Attendance In Training
 - Should the customer miss training for a consecutive 30-day period, other than for an approved medical leave or emergency leave, the ITA will be cancelled and all remaining funds will be de-obligated. Documentation of medical or emergency leave must be provided to the assigned Career Specialist.
- Additional Customer Requirements
 - Must demonstrate through assessment results (i.e.: TABE, KeyTrain, college entrance exams) the basic skill sets to successfully complete training and obtain employment in the proposed occupation.
 - Must receive satisfactory grades/progress (determined by the training facility) and provide this information to the assigned Career Specialist in order to continue receiving funding. Should satisfactory grades not be obtained, customer will be placed on probation for the next term. Customer may return to training the next term; but if unsatisfactory grades/progress are made in term of return, customer will not receive funding for next term.
 - Must have acceptable attendance as defined by training provider.
 - Must maintain (at least monthly) contact with assigned Career Specialist.
 - Must be enrolled in and attend training for all terms until completion of training program.
- Availability of Funds/Waiting List
 - LWDB-11 reserves the right to enforce an ITA waiting list for Adult and/or Dislocated Worker ITAs due to availability of funding.
- WIOA Funding Restrictions – WIOA funds will be issued for the following:
 - Medical or dental procedures (excluding required exams for training)
 - Lost books or supplies or books / required supplies for repeat classes
 - Classes that must be repeated
 - Funding a customer who:
 - Has a student loan in default (unless a plan has been approved for repayment and documentation is provided to Career Specialist)
 - Is in default with the current training institution
 - Any training that requires more than two years to complete
- Modifications of ITA

Requests to increase an ITA may be approved on a case-by-case basis at the discretion of the assigned Career Specialist.

Action:

All American Job Center staff will make customers aware of potential benefits and assist in making an informed decision about employment and training options. Exceptions to this policy must be approved by the LWDB-11 Director or designee on a case-by-case basis.

Contact:

Questions regarding this policy should be addressed to Jimmy Bell, LWDB-11 Director, at SWHRA, 1527 White Avenue, P.O. Box 264, Henderson, TN 38340. Phone: (731) 983-3688. Email: jbelle@swhra.org.

Effective Date: July 1, 2017

Expiration Date: Until further notice

Approved: 
Jimmy Bell, LWDA-11 Director