
Chautauqua County

Workforce Investment/Development Board

Policy Name: Individual Training Account (ITA's)
Effective Date: 4/1/06
Revised: 06/18/13, 04/27/16, 10/25/17, 06/14/24

Explanation:

Under WIOA, training services may be provided if the American Job Center staff, including partner programs' staff, determines after conducting an interview, an evaluation, or assessment, and career planning, that the individual:

- Is 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 career services alone;
- Is in need of training services to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment;
- Has the skills and qualifications to successfully participate in the selected program of training services;
- Is unable to obtain grant assistance from other sources to pay the costs of such training, including such sources as State-funded training funds or Federal Pell Grants established under title IV of the Higher Education Act of 1965, or requires WIOA assistance in addition to other sources of grant assistance, including Federal Pell Grants (20 CFR 680.230 and WIOA sec. 134(c)(3)(B) contain provisions relating to fund coordination.);
- Is a member of a worker group covered under a petition filed for Trade Adjustment Assistance (TAA) and is awaiting a determination. If the petition is certified, the worker may then transition to TAA approved training. If the petition is denied, the worker will continue training under WIOA;
- Is determined eligible in accordance with the State and local priority system in effect for adults under WIOA sec. 134(c)(3)(E) if training services are provided through the adult funding stream; and
- Selected a program of training services that is directly linked to the employment opportunities in the local area or the planning region.

Dislocated workers may qualify for training funds if they establish through engaged career services that they are unable to obtain a job in their field with wages at least 90% or greater than the wage received at the time of dislocation.

The cap applies to training services governed by ITA's and provided by eligible training providers chosen by individual customers. Supportive services are governed by a separate policy and not included in ITA's. Individual Training Accounts are available through the Chautauqua Works American Job Centers. Funding for post-employment (customized) training is not capped per individual, but determined by agreement between the business and the WIB/WDB. Post-employment funding is obtained by contacting the Executive Director of the WIB/WDB.

ELIGIBLE TRAINING PROGRAMS/COURSES

An ITA will cover costs associated with occupational training leading to a certificate, license, or completion of a two year degree leading to employment in a demand occupation. An ITA may be used to cover the costs of completing a Baccalaureate degree (leading to employment in a demand occupation) provided that the customer only requires 60 credit hours or less of coursework to complete that degree.

ITA requests for trainings not included on the Demand Occupation List may be approved as an exception by the WIB/WDB Executive Director if the occupation is adequately shown to lead to employment in an occupation with a current or new demand in the LWDA through demonstrated employment opportunities and/or business identified employment opportunities.

Policy:

The individual training account level is set at a **\$5,000** per person cap for each fiscal year as defined as July 1- June 30. For exceptions to this policy, approval by the Director will be made based on proposed skills to be trained, degree of shortage, targeted industry and available funds. For ITA requests exceeding \$6,000, approval by the Training Committee of the WIB/WDB will be made as warranted and reported to the WIB/WDB at the next WIB/WDB meeting.

Allowable ITA Expenses and Fees:

- Tuition
- Technology Fees
- Faculty Student Association Fees
- SUNY Learning Network Fees
- College Processing Fees
- Accident Insurance Fees
- Lab Fees (e.g., physics, engineering, nursing, OTA, biology, physical education, welding, health services physical, etc.)

Unallowable ITA Expenses and Fees:

- Textbook & Supplies (these are covered under the Supportive Services Policy)
- Meal Plan
- Health Services Fees
- Health Insurance Fees
- Credit Free Review Session Fees
- Re-Test Fees

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