

Southwest Ohio Region Workforce Investment Board

Policy: Training Programs Policy and Individual Training Accounts Policy

Approval Date: June 12, 2014

Purpose: To define and set forth requirements of eligibility for various training programs and Individual Training Accounts for Adults for Ohio WIOA-Area #13 Southwest Ohio Region Workforce Investment Board (SWORWIB).

Reference:

WIOA Law states that funds allocated to a local area for adults and dislocated workers shall be used to provide training services when the eligibility requirements are met. The Individual Training Account (ITA) Policy is established for eligible adult and dislocated workers for training services. Training services may only be provided by eligible training providers.

Policy Statement:

1. The customer must meet WIOA criteria.
2. The customer must consult with the Career Coach prior to enrolling. At no time can a customer enroll without approval and expect WIOA to cover the cost.
3. The ITA must be processed prior to the start date of training.
4. The training program must be included on the State of Ohio Eligible Training Provider (ETP) List and approved by Area #13 in alignment with identified industry sectors and satisfaction of training provider performance criteria during annual ETP evaluation.
5. In the event of a customer having defaulted on a student loan, the customer is not eligible for an ITA during a time of the limited funds policy being enacted. If the Limited Funds Policy is not active, and the customer is in default on a student loan, prior to ITA approval the customer must provide documentation indicating a repayment plan is in place and being followed. Documentation will be determined by the OMJ Center Operator.
6. A signed Training Provider contract must be in effect between the OMJ Center Operator and the selected entity providing the training program.
7. The training program must either:
 - prepare the customer for entry-level employment in a specific occupation or group of occupations; or
 - prepare the customer for a third-party or industry certification which documents the achievement of an advanced level of competence in a specific occupation or group of occupations; an industry third-party certification means that the certification is granted by a licensing authority, professional association, or similar entity other than the training institution itself. The certification must document that the customer has demonstrated, through testing, a predetermined minimum competence level. Attendance is not equal to testing and assessment.
 - The certification must also be portable and industry recognized.
 - Portable means that it is recognized beyond the single issuer as industry valued.
 - SWORWIB values training which also carries college credit recognition and expects publically financed training to be transferable so WIOA participants earn college standing for State of Ohio credentialing.
 - Additionally, training accounts for individuals must meet the industry sector priority list as defined by the SWORWIB, as well as two of the three state required criteria: high wage, high demand, and high skill occupation.
8. Where a training program is available with both a certificate track and associate degree track in the same occupational area, an ITA may be issued for the certificate track only in order to advance employability. When a customer has successfully completed the certificate track and received a certificate, the Career Coach Manager may consider funding for further training on a case-by-case basis. Justification must be provided which supports that further training is needed in order for this individual to attain or retain self-sufficient employment.

9. The SWORWIB values helping customers get into the workplace, so ITAs in Area #13 are focused on short-term credentialing that is valued in the marketplace for employment and should be preferably 3-9 months or less in duration.
10. ITAs will not be issued for the following types of activities:
 - Seminars, workshops, or similar programs which are not graded, do not provide credit, and/or do not prepare an individual for a certification examination;
 - Individual courses or classes, whether or not taken for credit, which are not part of the curriculum of a diploma, certificate, or degree program approved by the SWORWIB for establishment of an ITA;
 - Pursuit of a Masters Degree, in full or part;
 - Courses or programs which, standing alone, provide only:
 - Job Readiness/ Job Skill enhancement;
 - Management techniques;
 - Professional development or informational updates;
 - Personal development;
 - Continuing professional education; or
11. Educational development which is not occupation-specific. The training program must be provided to customers of the SWORWIB at the same cost as it is provided to the general public. In the event training is free to customers similar to the WIOA customer, the free training will not be fee-based to the SWORWIB but rather our customer will be referred to apply for the free training.
12. Based on #11 above, ITAs will not be issued to pay for training programs which are available at no cost to the general public (e.g., nursing aide training available free from nursing homes after hire, as an example).
13. A maximum of \$5,000 per customer may be spent for training costs, i.e., tuition, books, fees, registration, etc., within a five year period. Rare exceptions will be made on a case-by-case basis following administrative review. The customer's assessment information, individual service strategy, and employability goals will be reviewed to determine if a more cost-effective training program should be utilized, if the customer has sufficient resources to assist in funding his/her own costs, availability of financial aid, etc. On-the-job training and customized training are excluded from this training spending cap. The spending cap does not include funds used for supportive services.
14. Decisions to approve or reject a customer's request for an ITA will be communicated to the customer by the OMJ Operator in writing within a reasonable time frame of the decision. The letter needs to be a typed form letter, with a copy kept on file. Rejection letters must include the reason(s) why the request has been denied. Letters will also include a list of other services available to the customer.
15. The SWORWIB approves industry sectors bi-annually based on statistical research and regional economic agendas relative to high demand, high wage employment projections and in alignment with the in-demand occupations information provided on the OMJ website and required to be applied to ITA consideration.
16. Dislocated Workers do not have to obtain training within the SWORWIB identified industry sector priorities if they are able to show a potential employment in an occupational category not within the industry priorities.
17. The SWORWIB takes its responsibility to invest in our local workforce seriously. We believe in an "informed customer choice" where our customer is choosing a career or direction and training based on data and opportunity rather than responding to sales tactics and marketing pressures from the training and educational marketplace. Therefore we provide information on the eligibility of training providers in Area #13 based on an evaluation of performance by training provider applications and re-applicants on an annual basis. We also provide information to customers from local, regional and national media relative to the merits of training and any articles about particular trainers.

Action:

The Ohio WIOA-Area #13 Southwest Ohio Region Workforce Investment Board shall share this policy with the OMJ Center Operator for implementation. The OMJ Operator will provide ITA rejection reports and give an annual report to the full SWORWIB on numbers and dollars deployed for ITAs by industry sector and by training provider. The OMJ Center Operator will create any forms that are needed to train staff and implement the policy. The OMJ Center Operator will review policies that link to State directives

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and share same with all OMJ Center staff and coordinate with the SWORWIB for any adjustments that may therefore become necessary to this policy.