

	<b>West Central Region Local Policy</b>		
	<b>Subject:</b> Individual Training Account (ITA)	<b>OWD Approval Date:</b> 8/28/25	<b>Board Approval Date:</b> 8/27/25
	<b>Reference:</b> OWD Policy 14-2024 and subsequent issuances	<b>Revision:</b> 12	<b>Effective Date:</b> 8/28/25

Individual Training Account (ITA)

WIOA funding for training services is made available to customers who:

- Exhibit the need and aptitude for training to obtain employment that provides a self-sufficient wage;
- Are unable to obtain grant assistance or other federal and/or state sources to pay for all or part of the cost of training;
- Require funding assistance beyond that which is available through other grant sources.

Other considerations include availability of jobs in the area that match the current educational credentials of the customer (as evidenced via open local job orders), current transferrable skills, past training, past performance, assessment results, employer expectations, and growth potential for jobs related to the placement or area of study. Frontline staff and Functional Leaders will identify and recommend to the WDB staff designee, for final approval, those participants they deem eligible and appropriate to move into training level services.

Coordination of funds will be required when Higher Education Act (HEA) Title IV financial assistance such as PELL grants is available to WIOA training-eligible customers. The customer may enroll in WIOA-funded training while his/her PELL Grant application is pending. Participation in a WIOA-funded training program shall not require participants to apply for student loans or incur debt as a condition for participation. A Funding Use Statement may be required if loans are applied to the student account prior to the PELL Grant and WIOA funds, to document there was a need at the time the student applied for WIOA assistance. At no time will the customer receive payment of WIOA funds as part of a remaining credit balance.

Training services shall be provided in a manner that maximizes customer choice in the selection of an eligible provider. MO Scores may be accessed through jobs.mo.gov to identify WIOA eligible training providers, WIOA-approved courses, costs associated with training, program descriptions, completion rates, wage expectations, etc. One-Stop Job Center staff will provide participants with all the choices for programs and training providers. Participants will be provided with a *Customer Choice in Training Form* to sign. The Workforce Development Board (WDB) will make every effort to identify new and emerging industry sectors or occupation clusters within the local labor market. Requests for approval for new training providers and specific curriculum will be made to OWD ETPS Coordinator whenever such sectors show a sufficient, in-demand need. *Refer to the Local Eligible Training Provider Selection Policy.*

	<b>West Central Region Local Policy</b>	
	<b>Subject:</b> Individual Training Account (ITA)	<b>Release Date:</b>
	<b>Reference:</b> OWD Policy 14-2024 and subsequent issuances	<b>Revision:</b> 12

Use of funds for ITAs in the West Central Region will be targeted to courses that have been locally approved. The amount that a participant can receive for an ITA (WIOA, SkillUP, and other funds) shall not exceed the lifetime maximum of \$5,000.00 over the course of program participation. This could be a certificate earned in one year or less, a two -year associate degree, the completion of a bachelor’s degree program or a registered apprenticeship. It is not the intent of the WDB to fund degrees beyond that of a bachelor’s level or to fund training for individuals already possessing credentials sufficient to obtain employment in skill areas representing job openings, or to fund training costs associated with a participant’s decision to change their degree or program of study will not be eligible for WDB funding.

- Exceptions will be on a case -by -case basis and subject to funding availability.
- Participants will need to write a letter of exception that includes details on why they need the exception and justification on how it will improve their circumstances and make them more marketable to employers.
- Letter of exceptions to fund beyond the life time cap of \$5,000 will be approved or denied by the Executive Director and reported to the Planning and Operations Committee at the next committee meeting.
- Letter of exception for funding beyond a bachelor’s degree or when skills are sufficient to find employment will be submitted to a committee comprised of the Board Chair, Vice Chair, and 2<sup>nd</sup> Vice Chair for approval/denial.
- Approvals/denials will be made within 48 hours of submission.

All funding considerations will be based on the participant’s county of residence, funding source and availability, program eligibility, assessment results, the participant’s ability to complete requested training, and area of study related to jobs in in-demand industries or sectors with an A or B grade per MERIC data. The West Central Region recognizes the following in-demand sectors: Healthcare/Social Assistance, Manufacturing, Retail Trade, and Food Production. Jobs representing grades C and below or that fall outside these in- demand sectors will be evaluated on a case -by -case basis. Job Center staff will utilize locally-developed forms in the request for funding, approval, and payment processes. Prior to submission of funding requests, verification of Skill UP enrollment must be completed. If participant is enrolled in SkillUP and requesting funding for training, any books, supplies, and/or fees and other costs will need to be submitted on a supportive service request form. Funding requests have to be approved no later than five (5) business days prior to the start of training.

	<b>West Central Region Local Policy</b>	
	<b>Subject:</b> Individual Training Account (ITA)	<b>Release Date:</b> 03/26/2025
	<b>Reference:</b> OWD Issuance 09-2019	<b>Revision:</b> 10

Exceptions to the use of ITAs will only be made in the following instances:

- When the training services provided are On-the-Job Training, Customized Training, and Incumbent Worker Training.
- When the training is less than 40 hours as described under Missouri’s Eligible Training Provider Certification.
- When a vendor relationship exists (short-term training is available to the general public and is purchased by the WDB for specific purposes.)
- When the WDB determines there is a short-term training service of demonstrated effectiveness offered in the area by a community-based organization or other state or federal agency to serve special customer populations that face multiple barriers to employment. Individuals with multiple barriers to employment may include those who are low-income with substantial language or cultural barriers, ex-offenders, those who are basic skills deficient, and/or homeless individuals.

Training funds will not pay for classes completed prior to enrollment and repeat classes funded by the same funding source. If a customer applies for WIOA funds and they have already started classes, WIOA cannot fund those classes. If a participant has already started training, an ITA can be issued to cover costs only after the next natural break in training (i.e. semester).

To qualify for, and continue to receive training funds, participants must:

- Demonstrate through assessments, the skills to successfully complete training and obtain employment in the proposed occupation.
- Provide grade reports or grade transcripts to demonstrate academic progress.
- Maintain a 2.5 cumulative grade point average on a 4.0 scale. Training funds will not be obligated for the following semester or term if participant is placed on academic probation by the training provider, or if academic progress falls below a 2.5 cumulative grade point average within a grade reporting period. Training funds will not be obligated for the following semester if a participant receives a failing grade and they do not retake the course or test at the next available opportunity. The client will bear the cost of repeating the course or test.
- Maintain 90% attendance.
- Maintain contact with their case manager, at a minimum monthly.
- Comply with training provider policies and requirements pertaining to classroom behavior.
- For online courses, participants must contact their case manager on a monthly basis to advise them of course progress. The school must send the case manager a monthly report confirming days of attendance, progress made, and any concerns.

The Executive Director can make exceptions to this policy at any time and will notify the necessary board members of those exceptions when made.