



T H R E E R I V E R S

WORKFORCE INVESTMENT BOARD

TRWIB, Inc.

Individual Training Account (ITA) **Policy PY 2009**

The Three Rivers Workforce Investment Board has adopted the following policy with respect to the use of Individual Training Accounts (ITAs) funded through regular Workforce Investment Act (WIA) & American Recovery and Reinvestment Act (ARRA) allocations for the program year from July 1, 2009 to June 30, 2010.

ITA Funding Cap

The maximum value of an ITA will be \$8,000 for residents of the City of Pittsburgh or Allegheny County. For dislocated workers and youth nonresidents, the maximum value will be the lesser of \$8,000 or the funding limit of the Workforce Investment Board in the customer's county of residence. Per the Three Rivers Workforce Investment Board's Priority of Service Policy:

- ITAs funded through WIA/Adult WIA/ARRA allocations shall be available to Pittsburgh and Allegheny County residents.
- WIA/ Dislocated Worker & ARRA/Dislocated Worker allocations shall be available to Pittsburgh and Allegheny County residents or workers dislocated from Allegheny County work sites.
- Exceptions will be considered for non-residents who live closer to a PA CareerLink in Pittsburgh/Allegheny County than to a PA CareerLink site in their home county.

Maximum Duration Limit of ITA

ITAs will be valid for up to two years.

Expenses an ITA Will Cover

ITAs may be spent on tuition, fees, books, and school supplies (if the books and supplies are provided or sold by the school). An individual may only receive ITA funding once.

Trainings covered by ITAs

ITAs must be used for training in a High Priority Occupation. ITAs may also be used for occupations for which there is demand in another geographic area to which the customer is expressly willing to relocate.

Additional Information

- Students are required to complete financial aid forms if the program qualifies. Pell and PHEAA and related grants must be utilized before payment of ITA funds.
- Students must indicate how the remaining costs of training will be funded.
- An individual cannot quit employment to attend training.
- ITAs will not be issued to any student who does not have a high school diploma, GED or equivalent.

If either the City of Pittsburgh or Allegheny County would like to increase or decrease the ITA amount, the following information will be required **as a joint request from both the City of Pittsburgh and Allegheny County**:

- For the last completed Program Year:
 - the number of people who completed ITAs, entered employment, retained employment, and their average wages.
 - the amount of money that was allocated to ITAs?
 - how much money was actually spent on ITAs?
 - the average cost of training for the people who completed ITAs?
- The numbers of people CareerLink counselors see/counsel regarding ITAs vs. the number of people that actually receive them. (This requires tracking by PA CareerLink counselors).
- Of ITAs issued from the City of Pittsburgh/Allegheny County how many fell under the \$8,000 cap? How many were over?
- List the training programs that were under \$8,000 and the number of people who attended them. Of these people, how many are employed and retained employment? What are their average wages?
- List the training programs that were over \$8,000 and the number of people who attended them. Of these people, how many are employed and retained employment? What are their average wages?

Monitoring

TRWIB’s monitoring of ITAs will coincide with the monitoring of OJT/Customized Training contracts. All of the OJT/Customized Training contracts for the current program year will be monitored and the City and the County will be asked to randomly select Adult, Dislocated Worker and Rapid Response & ARRA files for the ITA portion of the review.

**ITA and OJT/CUSTOMIZED TRAINING
MONITORING TIMELINE**

ACTION	TIME
TRWIB begins monitoring ITA and OJT/Customized Training contracts	Monday May 1, 2010 – Monday, June 30, 2010
TRWIB monitoring of ITA and OJT/Customized Training contracts completed	Wednesday, June 30, 2010
TRWIB reports monitoring findings to Compliance Committee	June 2010 meeting
TRWIB reports monitoring findings to Executive Committee	July 2010 meeting
TRWIB reports monitoring findings to full board	September 2010 meeting
TRWIB reports update on corrective action plans, if applicable, to full TRWIB board	November 2010 meeting