



## **Policies and Procedures**

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### **Individual Training Account Policy**

#### **General**

The Dutchess County Workforce Investment Board (DCWIB) is committed to creating a skills ready workforce that is competitive and flexible enough to succeed in the changing workforce.

The Individual Training Account Policy (ITA) governs the DCWIB in setting monetary limitations for ITAs. The intention of the policy is to control spending efficiently and rationally by addressing the needs of demand occupations and encouraging the development of a skills ready workforce.

This policy promotes the acquisition of employable and transferable skills by individuals by allocating training funds for skills training up to 1 year duration in occupations with immediate need in Dutchess County. Training may last longer than 1 year, but may not exceed 2 years and may utilize funds under this policy provided that the total cost to WIA funds does not exceed the maximum set for ITAs. Training will be provided only in industries or occupations deemed eligible for funding as defined by Attachment A.

Qualifying for ITA training is an intensive process that requires interviews, research, and potentially counseling. While all efforts to minimize the length of time the process takes will be made, it is anticipated that from start to issuing an ITA may take 45 days or longer.

This policy is to be used to determine the amount of funding available for the identified course of study after Dutchess County One Stop Center (One Stop) has approved a customer's application for training services.

#### **Pre-requisites for Training**

Subsidy for training is not an entitlement, rather it is provided to those applicants who demonstrate a high probability of success due to training. In order to increase the probability of successful completion of training and employment after training, the following criteria will be used to determine a customer's eligibility for ITA training services:

1. Applicants must have an Individual Employment Plan (IEP) which identifies specific employment goals including job titles, training coursework and which correlates to appropriate experience and employment history such that training will likely lead to employment in the identified field.
2. Applicants for ITAs who have employment gaps totaling six months out of the prior 24 months will not be considered eligible for training until they complete an approved Workforce Readiness curriculum and pass the test required to receive a



Workforce Readiness Certificate. Costs associated with the curriculum and test will be borne by the DCWIB and will be applied to the subsidy identified in the paragraph titled “Training Limits.”

3. If an applicant for an ITA has been issued an ITA within the past 24 months and has failed to enroll or complete the coursework associated with said ITA, the applicant will not be considered eligible for an additional ITA until completion of the requirements identified in paragraph 2 above.

### **Training Limits**

Those individuals approved for training will be eligible for up to \$5,000 in subsidies over the training period. Only those enrolled in programs offered by institutes of higher learning or the BOCES system are eligible ITAs which exceed 1 year. Graduate studies are not eligible for funding under this program.

**Flexibility regarding pre-qualification or awards greater than the maximum ITA formula:** At the discretion of the DCWIB an individual customer may receive a waiver to exceed the maximum ITA amount allowable. A written explanation will be attached detailing the circumstances of the exception and reported to the Operations Committee at the next regularly scheduled meeting.

An employable skill is a skill, skill set, or specific license or certification, held by an individual that is actively sought by various local industries and is highly marketable because it is directly applicable to multiple available job descriptions.



ATTACHMENT A

**HUDSON VALLEY REGION  
SHORT TERM OCCUPATIONAL TRAINING  
DEMAND OCCUPATIONS  
BASED ON META JOB ENGINE SEARCH**

A Demand Occupation is defined as job or occupation choice that can be searched in a meta job engine of the One Stop Operator's Counselor's choice and which yields 7 or more jobs that the customer will have qualifications for after appropriate training as determined by the Counselor based on the following minimum criteria (Qualifying Search):

1. Search shall, as a minimum, include a job title and skills set as defined by the training sought.
2. The search shall use the modifier "and" between the above identified search criteria in order to produce more accurate results.
3. The applicant's qualifications must substantially correlate to those identified by the results of the job search. For example, if an applicant is seeking training in phlebotomy and the bulk of the results are seeking LPNs with phlebotomy experience and the applicant is not an LPN, the applicant should not be approved for the training. As another example, if the job search results require the sought after training and a combination of 5 years experience that the applicant does not possess, the applicant should not be approved.
4. Search shall be limited to a 50 mile radius based the zip code of the applicant's home.

If the Qualifying Search yields less than 7 "hits," then no training ITA is to be granted unless approved by the DCWIB Executive Director. Notwithstanding the foregoing, if the occupation has experienced significant decline in the prior quarter's NYSDOL employment report OR if the occupation currently has a significant number of individuals currently on the unemployment or extended unemployment rolls, then no training will be granted unless approved by the DCWIB Executive Director.