

# SC WORKS

## PEE DEE

### PEE DEE LWDA INSTRUCTION NUMBER 20-001

**TO:** Pee Dee Local Workforce Development Area Adult and Dislocated Worker Contractor

**SUBJECT:** Individual Training Account (ITA) Yearly and Lifetime Training Caps

**ISSUANCE DATE:** August 27, 2020

**EFFECTIVE DATE:** July 1, 2019

**EXPIRATION DATE:** Indefinite

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**Purpose:** The purpose of this instruction is to transmit the Pee Dee Local Workforce Development Board's decision to increase Individual Training Account (ITA) yearly and lifetime caps for Workforce Innovation and Opportunity Act (WIOA) adult and dislocated worker participants.

**Background:** Effective May 1, 2011, and in response to the South Carolina Legislative Audit Council's review of the WIA program for the State, the State Workforce Investment Board (SWIB) imposed a lifetime ITA cap to ensure consistent and effective use of WIA training dollars throughout the state. The SWIB's set the lifetime cap at \$14,000 per WIA participant. The Local Areas were allowed to impose stricter caps than the state-imposed cap.

On February 1, 2011, the Pee Dee Workforce Investment Board voted to adopt a lifetime ITA maximum of \$13,500 for every participant enrolled in WIA-funded classroom training in the Pee Dee Local Workforce Investment Area. The yearly ITA maximum was set at \$4,500 per participant. Although the LWIA's policy technically allows a participant three years of training at \$4,500 per year, it is expected that, unless there are extenuating circumstance that will only allow a participant to enroll in training part-time, full-time training for participants be the norm.

On June 22, 2017, the LWDA issued a Supportive Services Policy under the Workforce Innovative and Opportunity Act, limiting the amount of supportive services a WIOA participant could receive annually to \$3,000 (including cash and direct payments to vendors). Supportive Services, according to WIOA, include the following:

- (a) Linkages to community services;
- (b) Assistance with transportation;
- (c) Assistance with child care and dependent care;
- (d) Assistance with housing;
- (e) Needs-related payments (currently not offered in Pee Dee);
- (f) Assistance with educational testing;
- (g) Reasonable accommodations for individuals with disabilities;
- (h) Legal aid services;

- (i) Referrals to health care;
- (j) Assistance with uniforms or other appropriate work attire and work-related tools, including such items as eyeglasses and protective eye gear;
- (k) Assistance with books, fees, school supplies and other necessary items for students enrolled in postsecondary education classes; and
- (l) Payments and fees for employment and training-related applications, tests and certifications.

On June, 19, 2019, the Pee Dee Workforce Development Board voted to increase the Pee Dee Local Area's ITA annual maximum to \$5,500 and to align its maximum lifetime ITA allowance with the State of South Carolina's lifetime maximum of \$14,000. This increase was needed due to the rising cost of tuition at public and private training providers and the increased requests for waivers to exceed the annual approved amount.

**Action:** WIOA contractors are required to ensure that all expenditures for classroom training be limited to the \$5,500 per year annual ITA limit and the \$14,000 lifetime limit for every participant receiving WIOA assistance to attend training. In order to track payments made toward these yearly and lifetime maximums, all training budgets and expenses, including GED and basic skills training, must be entered into the financial management system approved by the local workforce development area. Supportive services must also be tracked separately.

The following ***IS*** included in the computation of the ITA maximum:

- Tuition required for the completion of training; and
- GED and/or basic skills training.

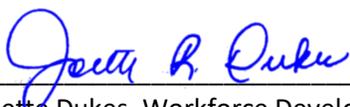
The following ***IS NOT*** included in the computation of the ITA maximum:

- Supportive Services, as defined above;
- On-the-job training payments made to an employer on behalf of a WIOA participant
- Any portion of training that is paid with resources other than WIOA funds (i.e. PELL, Lottery, TAA, etc.).

Prior approval to exceed the annual maximum set forth in this instruction must be obtained from the LWDA, or if deemed necessary, from the Pee Dee Workforce Development Board. Exceptions will be made in very limited circumstances and on a case-by-case basis, **but there will be NO exceptions granted to allow an Adult or Dislocated Worker's lifetime maximum to exceed the Local Area's and the State's lifetime established maximum of \$14,000 per participant.**

This policy will take precedence over other LWDA's instructions regarding training participation, including the policies governing repeat classroom training, sponsorship of participants in 4-year training programs, sponsorship of training in the WDB's preferred occupations, and satisfactory progress policy. In other words, if adherence to any of the aforementioned policies will violate the yearly or lifetime maximums, the imposed ITA limit will have precedence.

Inquiries: Any questions regarding this instruction should be directed to Joette Dukes at (843) 669-3138.



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Joette Dukes, Workforce Development Director