



2012.05.24.A.2.1

## Strategic Policy

<b>Title:</b>	<b>Local Area Individual Training Account Reporting Requirements</b>
<b>Adopted:</b>	05/24/2012
<b>Effective:</b>	07/1/2012

### I. PURPOSE AND SCOPE

To measure local workforce development boards (local boards) within the CareerSource Florida network on their compliance with the Individual Training Account (ITA) reserve requirement. Local boards are required to report all allowable expenditures through the One-Stop Management Information System (OSMIS) administered by the Department of Economic Opportunity (DEO). DEO semi-annually compiles training expenditure data submitted by and verified through OSMIS to capture necessary ITA data used to measure compliance with the ITA expenditure requirement. DEO aligns local area reporting requirements for ITA expenditures with statutory restrictions and policies adopted by CareerSource Florida, Inc. (CSF).

This policy applies to all 24 local boards for reporting ITA expenditures.

### II. BACKGROUND

DEO is the executive agency that receives federal funds, including Workforce Innovation and Opportunity Act (WIOA) funds, for workforce development programs. DEO distributes funds to Florida's 24 local boards and monitors the use of these funds. Florida law requires that "at least 50 percent of the Title I funds for Adults and Dislocated Workers that are passed through to [local boards] shall be allocated to Individual Training Accounts unless a [local board] obtains a waiver from [CSF]. Tuition, books, and fees of training providers and other training services prescribed and authorized by the Workforce Investment Act qualify as Individual Training Account expenditures." [section 445.003(3)(a)1, Florida Statutes].

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Chapter 2012-29, Laws of Florida, limits the categories of expenditures authorized from ITAs. It did not change the 50 percent ITA reserve requirement, or CSF's authority to grant a waiver from the requirement.

**III. AUTHORITY**

[Section 445.003\(3\)\(a\)\(1\), Florida Statutes](#)

**IV. HISTORY**

<b>Date</b>	<b>Description</b>
05/23/2017	Changed references to Workforce Florida, Inc. (WFI) to CareerSource Florida, Inc. (CSF); changed regions to local workforce development boards (or local boards); changed references to Workforce Investment Act (WIA) to Workforce Innovation and Opportunity Act (WIOA); consolidated sections to align more closely with DEO administrative policies.

**V. ATTACHMENTS**

None.