



2012.05.24.A.2.2

Strategic Policy

Title:	Qualified Training Expenditures
Adopted:	05/24/2012
Effective:	07/1/2012

I. PURPOSE AND SCOPE

This policy provides guidance for CareerSource Florida, Inc.'s (CSF) decision on "qualified training expenditures." Chapter 2012-29, Laws of Florida, grants CSF authority to provide a waiver from the 50-percent Individual Training Account (ITA) reserve requirement, including authority to determine types of expenditures authorized as "training services," as referenced in federal law.

Qualified training expenditures include:

- 1) Occupational skills training (OST) [Public Law 113-128, Workforce Innovation and Opportunity Act (WIOA)];
- 2) Other WIOA-specified training services and activities through eligible providers or employers [Public Law 113-128, Workforce Innovation and Opportunity Act (WIOA)];
- 3) Work experience and internships;
- 4) Staff costs of local workforce development boards (local boards) within the CareerSource Florida network directly related to developing, implementing or coordinating authorized training programs and/or directly related to developing, implementing, or coordinating training programs for training-eligible clients participating in training programs funded by non-WIOA sources; and,
- 5) Local board staff expenditures directly related to case management and job placement services for clients in training but not clients seeking training.

QUALIFIED TRAINING EXPENDITURES

These definitions are completely described in the Department of Economic Opportunity's (DEO) Final Guidance (DEO FG-074).

This policy applies to all 24 local boards.

II. BACKGROUND

The Florida Legislature amended section 445.003(3)(a), Florida Statutes, limiting authorized ITA expenditures to tuition, books and fees of training providers and "other training services prescribed and authorized by the Workforce Investment Act." This law was interpreted to authorize a broader range of expenditures including various core, intensive and supportive services related to or associated with the training programs. This led to the use of non-reserved funds for other services and initiatives.

New expenditure restrictions on ITAs required the definition of "qualified training expenditures" to clarify what services count toward the 50-percent reserve. CSF has statutory authority to determine what expenditures qualify as "training services" provided through ITAs, to the extent that such services do not resemble core, intensive and supportive services as defined by federal law.

III. AUTHORITY

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

[Public Law 113-128, Workforce Innovation and Opportunity Act \(WIOA\)](#)

IV. HISTORY

Date	Description
06/29/2012	Final Guidance: DEO FG-074
05/23/2017	Revised copy in plain language; changed references to Workforce Florida (WFI) to CareerSource Florida, Inc. (CSF); changed references to regions local workforce development boards (local boards); consolidated sections to align more closely with DEO administrative policies.

V. ATTACHMENTS

[Final Guidance: DEO FG-074](#)