

Incumbent Working Training Program Guidelines

July 1, 2025- June 30, 2026

Program Overview

Funded by the federal Workforce Innovation and Opportunity Act (WIOA) and administered by CareerSource Florida (CSF) to provide grant funding for continuing education and training of incumbent employees at existing Florida businesses. Through the Incumbent Working Training (IWT) grant program, companies may receive reimbursement for preapproved, direct training related costs.

Incumbent Worker Definition

- Employee receiving W2 from the applicant employer.
 - Employee working at least 37.5 hours per week for applicant employer.
 - Employee who's at least 18 years of age.
 - Employee who's a U.S. citizen or a non-citizen with status permitting employment in the U.S.
 - Employee who's a Florida resident working at a physical location in Florida; and
 - Employee working for applicant employer for six months prior to the application's signature date.
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Available Funding & Maximum Reimbursement Amount

- Fiscal Year 2025-2026 (July 1 - June 30) \$3 Million.
 - The maximum amount is \$100,000 per grant per company.
 - Each individual FEIN must apply with a separate application.
 - Each FEIN can receive one award every other year.
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Company Eligibility & Requirements

- Applications submitted on or after July 1.
- "For-profit" companies or hospitals
- Operate a hospital as a nonprofit or local government entity in Florida.
- Operating for a minimum of one (1) year prior to the application date (as verified on [sunbiz.org](https://www.sunbiz.org)).
- Description of requested training and how it benefits the competitiveness of the business and the employee receiving the training.
- Demonstrate a commitment to retain or avert the layoff of employees receiving training.
- Demonstrate financial viability by providing:
 - Most recently filed IRS Form 941 (if a corporation) or a copy of the most recently filed 1040 Income Tax Return with Schedule SE (if a Sole Proprietorship).
 - A [Tax Clearance Letter](#) from the Florida Department of Revenue, dated within 90 days of application submission.
 - Letter from your bank, on its letterhead, verifying applicant has done business for at least the last six (6) months and is in good standing, or a credit check will be completed by CSF.
 - W-9 form (2024 version).
 - Compliance with the nondiscrimination and equal opportunity provisions of Section 188 of the Workforce Innovation and Opportunity Act; Title VI of the Civil Rights Act of 1964; Section 504

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of the Rehabilitation Act of 1973; Age Discrimination Act of 1975; Title IX of the Education Amendments of 1972; and with 29 C.F.R. Part 38.

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- Company must have at least one full-time Florida-resident employee receiving a W-2 that matches the company name on application. For a sole proprietor, the business owner will be considered the full-time employee.
- FEIN on all documents must be the same.

The following businesses are not eligible to apply for funds under this program:

- Not-for-profit agencies or organizations. [Note: This does not apply to hospitals operated by nonprofit or local government entities in the State of Florida.]
- Retail establishments.
- Entities whose administrations are entirely comprised of volunteers.
- Local workforce development boards (LWDB) and their administrative entities.
- Labor unions.
- Federal, state, county, or city governmental entities. [Note: This does not apply to hospitals operated by nonprofit or local government entities in the State of Florida.]
- Businesses that received an IWT grant award in the current or previous program year. [This does not include applicants who match the requirements of funding priorities 1 and 2.]

Funding Priorities

Funding priority shall be given in the order listed below to applicants meeting these conditions. For companies meeting specific the reimbursement percentage may be increased up to 75 percent.

1. Businesses that provide employees with opportunities to acquire new or improved skills by earning a credential on the [Master Credentials List](#).
2. Hospitals and healthcare facilities operated by nonprofit or local government entities provide nursing or allied healthcare opportunities to acquire new or improved skills.
3. Businesses whose grant proposals represent a significant upgrade in employee skills.
4. Businesses with 25 employees or fewer, businesses in rural areas, and businesses in distressed inner-city areas.
5. Businesses in a qualified targeted industry or businesses whose grant proposals represent a significant layoff avoidance strategy.

Costs

With proper documentation, the following direct training costs/expenses are reimbursable through the Incumbent Worker Training grant:

Allowed

- Tuition/training-course cost and/or instructor wages.
- \$300/instructor hour for vendor training.
- \$40/hour for company employees delivering the training.

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- Curriculum development: No more than 25% of each approved course cost will be allowed for curriculum development. Most of the grant amount will be dedicated to training.
- Textbooks/manuals: capped at \$100 per textbook and/or manual (limited to course content only – no certification or exam preparation materials). No more than 50% of each approved course cost will be allowed for textbooks.
- Related costs (limited to copies or slides at \$.03 per copy, training DVDs or tapes).

Disallowed

- Employee/trainee wages and fringe benefits.
- Compensation or consultant fees.
- Capital improvements.
- Travel.
- Food.
- Membership fees/dues.
- Conferences.
- Test/exam fees.
- Company website design and development, website hosting and maintenance, software upgrade, or advice on computer selection for purchase and upgrade.
- Purchase of employee assessment systems or licenses for system usage.
- Equipment.
- Annual membership for online courses.

Training Services

Private training companies, institutions, and instructors may be utilized upon review that includes, but is not limited to, accreditation and licensure, as well as prior approval by CSF. The training provider's website address and instructors' resumes must be provided.

The following are examples of training that are NOT eligible for funding:

- CPR and first aid.
- New hire orientation.
- Diversity and sexual harassment.
- English as a second language.
- Degree programs.
- Workplace literacy or soft skills.
- Training that includes food and/or beverages.
- Training that includes the purchase of equipment such as iPads or other equipment/supplies/devices that can be used outside of training.

Application

- Applications must be completed online (the [sample application](#) can be used to prepare for the online application).

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- Applications received via email, mail, or fax will not be accepted. The online application is the only method used to apply for the grant.
- Email used to create an application must be associated with company's domain name or an account linked to the company.
- Applications must be submitted 45 business days prior to the desired start date.
- Awards are made monthly.

➤ **Section 1: Company Information**

Must be completed in its entirety before exiting the application. You will not be able to return to or edit this section once you leave.

➤ **Section 2: Training Program/Training Item Detail**

Applicants must complete a Training Item Detail for **EACH** training course requested.

A training provider is a person or entity that provides employment-related, customized training and includes public schools (technical centers, community colleges, and universities), private institutions, training consultants, vendors, employer associations, and/or business trainers.

The following apply to training services:

- Conducted at the businesses' facility, at the training provider's facility or at a combination of sites.
- Instructors can be either full- or part-time educators or professional trainers from the business.
- Includes specific objectives (what is to be accomplished through the training).
- Includes expected outcomes, which should directly assist the company in increasing its competitiveness, viability and/or profitability.

➤ **Section 3: Training Program Budget**

Company's training budget will be reviewed for accuracy and compared with the training project, as the two should correlate with one another. An analysis will be conducted to ensure the cost per trainee is reasonable in comparison to the type of training being delivered.

Average trainee wages (those an employee receives while in training) must be included in the application.

➤ **Section 4: Anticipated Outcomes of the Training Project**

A brief statement to ensure the training will directly assist the company in increasing its competitiveness, viability, and/or profitability, allowing it to create or save jobs, reduce turnover, and/or increase the trainee(s) 'short- or long-term wages. All grant projects shall be performance-based with specific, measurable performance outcomes, including the completion of the training project and the number of employees trained.

➤ **Supporting Documentation**

The company must upload the following:

- [Tax Clearance Letter](#) from the Florida Department of Revenue.

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- 941 Tax Form.
- W-9 (2024 version).
- Letter from bank, on its letterhead, verifying applicant company has done business for at least the last six (6) months and is in good standing will be required, or a credit check will be completed by CSF.

Review and Approval

Application Receipt – An automated email from CSF will notify you that the application has been submitted and the status of your application will change to “under review.” If you do not receive, the application has not been submitted.

Due Diligence Review – Applications will be reviewed for completeness, ensuring the provision of all requested items. Any outstanding balances or liens to the State of Florida will result in the denial of your application.

Please note: Incomplete applications will delay the approval process, and the application will return to the queue.

Notification of Grant

Once review of the application is complete, the company contact listed in the application will receive an email notification of the pre-approved grant amount.

Grant Contract

A contract between CSF and the company will be sent electronically to the company contact via DocuSign for signature. The contract will then be returned via DocuSign to CareerSource Florida for signature. Once received, CSF will execute the contract through DocuSign. The fully executed contract will then be emailed to the company contact. The effective date of the contract is the date on which the CareerSource Florida CFO signs the contract. **All contracts not executed within 45 days will be voided.**

Contract Terms

Training and reimbursements may begin only after a fully executed contract is in place. Note that training began prior to the execution of the contract will not be reimbursed.

The contract will set forth all processes and expectations for administering, implementing, and completing the training.

Training must be completed within 12 months of the effective date of the contract (date CareerSource Florida CFO signs). The company will have 60 days from the end of the contract to submit final reimbursement requests for training completed during the contract period.

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Contract extensions are not permitted. A company is expected to have carefully assessed its training needs so that they apply only for the funds needed for training that can be completed within a 12-month time frame.

Reimbursement Rate and Process

The company may request reimbursement as frequently as needed during the 12-month period. Each reimbursement will be made in direct correlation with the company's training progress. The percentage of funds reimbursed during the 12-month period must be equal to or less than the percentage of trainees that have been trained to date.

All reimbursements must be submitted within 60 days of the contract end date. Reimbursements received after 60-days will not be processed.

Additional instructions will be made available upon execution of the contract. Businesses must provide at least 50 percent of the requested direct training costs:

- Instructor wages/tuition
- Curriculum development
- Textbooks, manuals

Reporting Requirements

Specific forms required for reimbursements are listed below and will be sent via email to the company contact approximately 10 business days following a fully executed contract. These Excel forms also include reimbursement instructions. If not received, please contact CSF.

- Trainee Data Submission Form: at a minimum will include:
 - Trainee's Legal Name
 - Trainee's Social Security Number
 - Verification of Citizenship Status
 - Date of Hire
 - Job Title
- Reimbursement Request Form.
- Sign-in Sheet for Vendors.
- Sign-in Sheet for Employee Led.
- Training Expense Summary Report.
- Substitution Request Form.
- Curriculum Development (if applicable).
- Manuals and textbooks (if applicable).
- Six Month Status Report.
- Final Training Evaluation.

Trainees' personal information should be submitted electronically, along with reimbursement requests, through the application portal, ensuring this information is transferred using the latest encryption technologies. All personally identifiable information (PII) is stored in Salesforce, a platform-

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as-a-service (PaaS) that maintains a comprehensive set of compliance certifications, including SOC 2. As an additional layer of security, social security numbers are stored using field-level encryption. Access to all PII is strictly controlled. To ensure the security of your data, please submit trainees' personal information electronically when requesting reimbursement through the application portal. We will not accept submissions that contain personally identifiable information via any other means. On an annual basis, CareerSource Florida submits a single file containing all Social Security numbers from companies receiving Incumbent Worker Training funds to the Florida Education & Training Placement Information Program (FETPIP), which is administered by the Florida Department of Education. The agency conducts long-term follow-up and accountability studies. Incumbent Worker Training staff will discuss the methods for secure transmittal with the business upon request.

***Please note:** the social security numbers reported are verified in the Florida Education and Training Placement Information Program (FETPIP) database. The provision of incorrect or falsified information may be construed as fraud, therefore making any expended funds immediately due and payable back to CareerSource Florida.

Other Training Resources

Additional training programs available at local and state levels to support Florida businesses include:

- Employed Worker Training (EWT) Grant – customized training designed to meet specific requirements of an employer or group of employers, with the commitment that the employer(s) will retain current employees or hire individuals who successfully complete the training. This grant is available through the business' LWDB.
- On-the- Job Training (OJT) Grant – training conducted by an employer that is provided to a paid participant while engaged in productive work in a job that provides knowledge or skills essential to the full and adequate performance of the job. This grant is available through the business' LWDB.
- Quick Response Training (QRT) Grant – flexible and customized training for a business' new, full-time, permanent employees. This grant is for new and expanding businesses in Florida and is available through [CSF](#).

Businesses can use these grants concurrently; however, the grants cannot subsidize one another or cover the same training costs. Receipt of other federal training funds such as those made available by the LWDB or by CSF (QRT), must be disclosed in your IWT application.

If you have any questions or need assistance completing the application, please contact CSF Grants Manager Malissa Counts at 850-759-4349 or MCOUNTS@CareerSourceFlorida.com.