

Approved _____ X _____
Disapproved _____

Action Item 5

REVISIONS TO CAREERSOURCE FLORIDA WORKFORCE POLICY P74 – INDIVIDUAL TRAINING ACCOUNT EXPENDITURE REQUIREMENTS AND WAIVER PROCESS

The CareerSource Florida Board of Directors serves as the principal workforce policy organization for the state as described in [Chapter 445.004\(2\), Florida Statutes](#). The state board establishes and directs the vision for the state workforce system. Federal and state law describes what items the state workforce development board (SWDB) must review, approve, or consider, including workforce development policies. CareerSource Florida and the Florida Department of Commerce (FloridaCommerce) review policies for effectiveness and efficiency. CareerSource Florida and FloridaCommerce reviewed CareerSource Florida Workforce Policy P74 – Individual Training Account Expenditure Requirements and Waiver Request Process.

WIOA and Florida law emphasize access to training that leads to credentials of value and employment. Boards should plan spending to match local job needs and work with partners to ensure training leads job seekers to good jobs and helps businesses find skilled workers. Revised Workforce Policy P74 – Individual Training Account Expenditure Requirements and Waiver Process describes the required use of WIOA funds for Individual Training Account (ITA) expenditures, sub-cost categories, requirements for allocating and reporting funds, and integrated service delivery and strategic alignment.

LWDBs must budget and spend at least 50% of their WIOA Adult and Dislocated Worker formula funds on allowable state ITAs expenditures unless they have an approved waiver. This revision expands allowable expenditures to include the cost of workforce training expended in other WIOA partner programs, providing the participant is co-enrolled. LWDBs that determine they need a waiver from this requirement must make a formal request with all required information consistent with directions issued in technical assistance on this topic. Both the LWDB and Chief Local Elected Official (CLEO) must approve waiver requests.

This revised policy also provides a Simplified Waiver Option for High-Performing LWDBs that demonstrate all the following:

1. An increase in recorded expenditures and/or individuals served in allowable training cost categories outlined in Section III.B. of the policy except Section III.B.5., Training Program and Case Management; and

2. A minimum of 25% of their WIOA Adult and Dislocated Worker formula funds expended in all allowable training cost categories outlined in Section III.B. of the policy except Section III.B.5., Training Program and Case Management.

LWDBs that meet the criteria above will need to submit a request notifying Florida Commerce and CareerSource Florida that they wish to utilize this option, in alignment with issued technical assistance and guidance. Submission must include an attestation indicating that the LWDB will continue to work to meet the 50% expenditure requirement. FloridaCommerce and CareerSource Florida will review internally available data and confirm eligibility for this option and notify the LWDB whether it is eligible to apply through the Simplified Waiver Option format or if a Standard Waiver Application is required. No additional information will be required for LWDBs qualifying for this waiver type.

CareerSource Florida sent this policy to all 21 LWDBs for consultation from December 19, 2025 – January 6, 2026. CareerSource Florida received 12 comments from 5 LWDBs. CareerSource Florida and FloridaCommerce conducted a thorough review of the comments. 73.30% of feedback was incorporated into the policy, and technical assistance is planned to address additional LWDB feedback.

FOR CONSIDERATION

- **Approve revisions to CareerSource Florida Workforce Policy P74 – Individual Training Account Expenditure Requirements and Waiver Process.**