

MEETING AGENDA

Meeting Details

Date: Friday, April 14, 2023

Time: 8:00 a.m.

Location: Administrative Office
584 NW University Blvd.
Suite 100
Port St. Lucie, FL 34986

Microsoft TEAMS Virtual Meeting Access

Access Code: 172 140 285#

Phone: 1-772-800-5467

URL: [Click here to join the meeting](#)

Opening Remarks

1. Welcome & Attendance
2. Declarations of Conflict of Interest

Voting Items

3. Review and Approve Financial Statements - January and February 2023
4. Review and Approve Local Targeted Occupations List (LTOL) Additions for 4th Quarter PY 2022-2023
5. Review and Approve Application for Extension of Provider of Direct Services 2023-2026
6. Review and Approve Welfare Transition (WT) Program - Incentive Policy Revisions
7. Review and Approve Welfare Transition (WT) Program - Transitional Support Services Policy Revisions
8. Review and Approve Welfare Transition (WT) Program - Program Requirements Policy Revisions
9. Review and Approve Supplemental Nutrition Assistance Program (SNAP) - Program Requirements Policy Revisions
10. Review and Approve Training Provider Recommendation - Treasure Coast Medical Institute

Information/Discussion

11. Primary Indicators of Performance 2nd Quarter PY 2022-2023
12. Application for Subsequent Local Workforce Development Area (LWDA) Designation - PY2023 & PY2024
13. RFP/RFQ Composite Rating Sheet - Award of Contract for Audit Services
14. Other Business
 - a. On-the-Job Training Termination Appeal - QPI Healthcare Services, LLC
 - b. Port St. Lucie Satellite Career Center - Closure
 - c. Board Membership - Ad Hoc Committee
 - d. Board Member Orientation Training - Annual Refresher
 - e. CareerSource Florida Board of Directors and Council Meetings
 - f. REACH Act Update
15. Adjournment

Next Executive Committee Meeting will be held on May 12, 2023

AGENDA ITEM SUMMARY

Title	Declarations of Conflict of Interest
Strategic	N/A
Plans/Goals	Public Law 105-220
Policy/Plan/Law	Information Only
Action Requested	In the event that a conflict of interest arises due to business or employment interests of associates or close family members, a Regional Workforce Development Board member would be required to reveal that conflict, to refrain from voting on the issue and to file a memorandum of voting conflict Commission Form 8B
Background	
Staff	
Recommendations	Conflict of Interest Statement Form
Supporting Material	8B Memorandum of Voting Conflict
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

collaborate.

innovate.

lead.

APPOINTED OFFICERS (continued)

- A copy of the form must be provided immediately to the other members of the agency.
 - The form must be read publicly at the next meeting after the form is filed.
- IF YOU MAKE NO ATTEMPT TO INFLUENCE THE DECISION EXCEPT BY DISCUSSION AT THE MEETING:
- You must disclose orally the nature of your conflict in the measure before participating.
 - You must complete the form and file it within 15 days after the vote occurs with the person responsible for recording the minutes of the meeting, who must incorporate the form in the minutes. A copy of the form must be provided immediately to the other members of the agency, and the form must be read publicly at the next meeting after the form is filed.

DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, _____, hereby disclose that on _____, 20: ____

A measure came or will come before my agency which (check one)

- inured to my special private gain or loss;
- inured to the special gain or loss of my business associate, _____;
- inured to the special gain or loss of my relative, _____;
- inured to the special gain or loss of _____, by whom I am retained; or
- inured to the special gain or loss of _____, which is the parent organization or subsidiary of a principal which has retained me.

(b) The measure before my agency and the nature of my conflicting interest in the measure is as follows

Date Filed

Signature

NOTICE: UNDER PROVISIONS OF FLORIDA STATUTES §112.317, A FAILURE TO MAKE ANY REQUIRED DISCLOSURE CONSTITUTES GROUNDS FOR AND MAY BE PUNISHED BY ONE OR MORE OF THE FOLLOWING: IMPEACHMENT, REMOVAL OR SUSPENSION FROM OFFICE OR EMPLOYMENT, DEMOTION, REDUCTION IN SALARY, REPRIMAND, OR A CIVIL PENALTY NOT TO EXCEED \$10,000.

AGENDA ITEM SUMMARY

Title	Review and Approve Financial Reports
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's
Action Requested	Review and Approve January and February Financial Reports
Background	The Board approved the budget for PY 2022-2023. The Executive Committee regularly reviews budgets, all amendments to the budget, and monthly expenditures.
Staff Recommendations	Review and Approve January and February Financial Reports
Supporting Material	Monthly Financial Reports
Board Staff	Lisa Delligatti Chief Financial Officer ldelligatti@careersourcerc.com (866) 482-4473 ext. 430

LWDB 20
Summary of Funding and Expenditures
As of January 31, 2023

PY 22-23 TOTAL AVAILABLE FUNDING	INDIRECT	10 ADULT	12 DW	11 YOUTH	122 Florida Rebuild	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	282 TAA
PY 22-23 Allocations		\$ 964,646	\$ 795,960	\$ 857,133	\$ -	\$ 773,417	\$ 481,855	\$ 252,197	\$ 173,093	\$ -	\$ -
PY 22-23 Supplemental		\$ -	\$ 246,460	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year		\$ -	\$ -	\$ -	\$ 32,721	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ (319,065)	\$ -	\$ (179,522)	\$ (116,207)	\$ -	\$ -
Carryforward to PY 23-24		\$ -	\$ (517,287)	\$ (578,590)	\$ -	\$ (49,086)	\$ (101,461)	\$ (41,935)	\$ (11,534)	\$ -	\$ -
Carryforward from PY 21-22		\$ -	\$ 985,700	\$ 594,618	\$ -	\$ 80,265	\$ 87,859	\$ 17,232	\$ 11,328	\$ 196,004	\$ 71,614
TOTAL	\$ -	\$ 964,646	\$ 1,510,833	\$ 873,161	\$ 32,721	\$ 485,531	\$ 468,253	\$ 47,972	\$ 56,680	\$ 196,004	\$ 71,614
FUNDING DRAWN DOWN YTD											
FUNDING DRAWN DOWN YTD	INDIRECT	10 ADULT	12 DW	11 YOUTH	122 Florida Rebuild	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	282 TAA
PY 22-23 Allocations		\$ 502,694	\$ -	\$ -	\$ -	\$ 182,688	\$ 109,778	\$ -	\$ 13,414	\$ 135,396	\$ -
PY 22-23 Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds		\$ -	\$ -	\$ -	\$ 5,113	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 23-24		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 21-22		\$ -	\$ 560,577	\$ 435,285	\$ -	\$ 80,265	\$ 87,859	\$ 20,075	\$ 11,328	\$ 196,004	\$ 209
TOTAL		\$ 502,694	\$ 560,577	\$ 435,285	\$ 5,113	\$ 262,953	\$ 197,637	\$ 20,075	\$ 24,742	\$ 331,400	\$ 209
% of Total Budgeted Funding Received		52.11%	37.10%	49.85%	15.62%	54.16%	42.21%	41.85%	43.65%	169.08%	0.29%
EXPENDITURES											
Administrative	\$ -	\$ 44,275	\$ 80,057	\$ 10,803	\$ 648	\$ 34,062	\$ 23,838	\$ 1,671	\$ 2,510	\$ 42,177	\$ 8
Salaries and Benefits	\$ 231,070	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 128,273	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (359,343)	\$ 141,301	\$ 8,031	\$ 10,803	\$ 648	\$ 9,062	\$ 23,838	\$ 1,671	\$ 2,510	\$ 42,177	\$ 8
Reclassification	\$ -	\$ (97,026)	\$ 72,026	\$ -	\$ -	\$ 25,000	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ 433,613	\$ 518,074	\$ 467,688	\$ 4,464	\$ 171,044	\$ 154,268	\$ 17,286	\$ 23,590	\$ 291,810	\$ 202
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 390,982	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 116,379	\$ 543,923	\$ 25,046	\$ 12,755	\$ 3,452	\$ 21,805	\$ 104,409	\$ 3,359	\$ 4,078	\$ 203,705	\$ 13
Contract Labor	\$ -	\$ 3,205	\$ 151	\$ -	\$ 4	\$ 33	\$ 12,792	\$ 7	\$ 17	\$ 6,809	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ 900	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services ITA	\$ -	\$ 451	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ 111,073	\$ 1,714	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-OJT	\$ -	\$ 38,106	\$ 1,672	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ 19,000	\$ 10,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 132	\$ 2,706	\$ 271	\$ 256	\$ 23	\$ 621	\$ 784	\$ 1,101	\$ 1,376	\$ 1,119	\$ -
One Stop Shared Costs	\$ -	\$ 117,026	\$ 5,354	\$ -	\$ 597	\$ 45,535	\$ 25,239	\$ 8,724	\$ 12,157	\$ 46,742	\$ 83
Other Operating Expenses	\$ 28,586	\$ 65,835	\$ 5,445	\$ 59,333	\$ 126	\$ 28,283	\$ 12,872	\$ 2,084	\$ 4,949	\$ 16,405	\$ 103
Allocated Program Indirect	\$ (145,098)	\$ 57,055	\$ 3,243	\$ 4,362	\$ 262	\$ 3,659	\$ 9,625	\$ 675	\$ 1,014	\$ 17,031	\$ 3
Reclassification	\$ -	\$ (525,666)	\$ 464,678	\$ -	\$ -	\$ 71,107	\$ (11,453)	\$ 1,335	\$ -	\$ -	\$ -
Total Expenditures	\$ 0	\$ 477,888	\$ 598,131	\$ 478,491	\$ 5,112	\$ 205,107	\$ 178,105	\$ 18,957	\$ 26,101	\$ 333,987	\$ 210
Funding Over/(under) expenditures	\$ 0	\$ 24,806	\$ (37,554)	\$ (43,206)	\$ 0	\$ 57,847	\$ 19,531	\$ 1,118	\$ (1,358)	\$ (2,588)	\$ (1)
YTD % of Budgeted Funds Expended		49.54%	39.59%	54.80%	15.62%	42.24%	38.04%	39.52%	46.05%	170.40%	0.29%

LWDB 20
Summary of Funding and Expenditures
As of January 31, 2023

PY 22-23 TOTAL AVAILABLE FUNDING	39 DWG COVID-19	390 DWG Hurricane Ian	40 WTP	470 Apprent Navigator	473 Recovery Navigator	474 Rapid Response Navigator	475 FAWA	48 F.A.T.E.S.	792 Youth SOS SLC	Other Non NFA
PY 22-23 Allocations	\$ -	\$ 178,000	\$ 1,144,745	\$ 62,500	\$ -	\$ -	\$ 3,000,000	\$ -	\$ -	\$ -
PY 22-23 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 74,342	\$ 300,000	\$ -
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 23-24	\$ (66,763)	\$ -	\$ (170,950)	\$ -	\$ -	\$ -	\$ (1,500,000)	\$ -	\$ -	\$ -
Carryforward from PY 21-22	\$ 129,310	\$ -	\$ 165,908	\$ -	\$ 166,510	\$ 65,577	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ 62,547	\$ 178,000	\$ 1,139,703	\$ 62,500	\$ 166,510	\$ 65,577	\$ 1,500,000	\$ 74,342	\$ 300,000	\$ -
FUNDING DRAWN DOWN YTD	39 DWG COVID-19	390 DWG Hurricane Ian	40 WTP	470 Apprent Navigator	473 Recovery Navigator	474 Rapid Response Navigator	475 FAWA	48 F.A.T.E.S.	792 Youth SOS SLC	Other Non NFA
PY 22-23 Allocations	\$ -	\$ 79,300	\$ 337,474	\$ 14,000	\$ -	\$ -	\$ 65,000	\$ -	\$ -	\$ -
PY 22-23 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 32,052
Additional Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 199,342	\$ 94,835	\$ -
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 23-24	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 21-22	\$ 5,010	\$ -	\$ 165,908	\$ -	\$ 84,140	\$ 17,632	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ 5,010	\$ 79,300	\$ 503,382	\$ 14,000	\$ 84,140	\$ 17,632	\$ 65,000	\$ 199,342	\$ 94,835	\$ 32,052
% of Total Budgeted Funding Received	8.01%	44.55%	44.17%	0.00%	50.53%	26.89%	4.33%	268.14%	31.61%	0.00%
EXPENDITURES										
Administrative	\$ 475	\$ 11,857	\$ 60,972	\$ 1,405	\$ 10,297	\$ 1,112	\$ 8,674	\$ 5,048	\$ 14,402	\$ 5,049
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ 475	\$ 11,857	\$ 60,972	\$ 1,405	\$ 10,297	\$ 1,112	\$ 8,674	\$ 5,048	\$ 14,402	\$ 5,049
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ 3,015	\$ 75,006	\$ 419,742	\$ 9,929	\$ 63,055	\$ 7,923	\$ 57,675	\$ 32,836	\$ 87,948	\$ 38,402
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 677	\$ 17,878	\$ 265,024	\$ 7,143	\$ 2,814	\$ 5,819	\$ 4,568	\$ 13,043	\$ 862	\$ 16,137
Contract Labor	\$ 1,920	\$ 5,304	\$ 9,435	\$ -	\$ 50,880	\$ -	\$ 13	\$ 8	\$ 7,597	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ 2,175	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ -	\$ 818	\$ -	\$ -	\$ -	\$ -	\$ 709	\$ -	\$ -
Support Services ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 69	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,950	\$ -	\$ -
Training-OJT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,500	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ 42,369	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 73,509	\$ -
Travel	\$ -	\$ 48	\$ 1,495	\$ 21	\$ 781	\$ 49	\$ 2	\$ 42	\$ 83	\$ 161
One Stop Shared Costs	\$ -	\$ 3,673	\$ 59,308	\$ -	\$ 23	\$ 1,299	\$ 74	\$ 2,473	\$ 7	\$ 11,187
Other Operating Expenses	\$ 226	\$ 946	\$ 56,866	\$ 2,197	\$ 4,400	\$ 308	\$ 49,516	\$ 1,003	\$ 75	\$ 8,879
Allocated Program Indirect	\$ 192	\$ 4,788	\$ 24,620	\$ 567	\$ 4,158	\$ 449	\$ 3,502	\$ 2,038	\$ 5,815	\$ 2,039
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expenditures	\$ 3,490	\$ 86,863	\$ 480,714	\$ 11,333	\$ 73,353	\$ 9,036	\$ 66,349	\$ 37,884	\$ 102,350	\$ 43,451
Funding Over/(under) expenditures	\$ 1,520	\$ (7,563)	\$ 22,668	\$ 2,667	\$ 10,787	\$ 8,596	\$ (1,349)	\$ 161,458	\$ (7,516)	\$ (11,399)
YTD % of Budgeted Funds Expended	5.58%	48.80%	42.18%	0.00%	44.05%	13.78%	4.42%	50.96%	34.12%	0.00%

LWDB 20
Summary of Funding and Expenditures
As of January 31, 2023

PY 22-23 TOTAL AVAILABLE FUNDING	YEAR TO DATE TOTALS			
PY 22-23 Allocations		\$ 8,683,546		
PY 22-23 Supplemental		\$ 246,460		
Unrestricted Funds Earned this year		\$ 32,721		
Additional Funds		\$ 374,342		
Retained by DEO for Merit Salaries		\$ (614,794)		
Carryforward to PY 23-24		\$ (3,037,606)		
Carryforward from PY 21-22		\$ 2,571,925		
TOTAL	\$ -	\$ 8,256,594		
FUNDING DRAWN DOWN YTD				
	PY 22-23 Actual	PY 22-23 Budget	VARIANCE	% Expended
PY 22-23 Allocations	\$ 1,439,745	\$ 8,683,546	\$ 7,243,802	16.580%
PY 22-23 Supplemental	\$ -	\$ 246,460	\$ 246,460	0.000%
Unrestricted Funds Earned this year	\$ 32,052	\$ 32,721	\$ 669	97.956%
Additional Funds	\$ 299,289	\$ 374,342	\$ 75,053	79.951%
Retained by DEO for Merit Salaries	\$ -	\$ (614,794)		
Carryforward to PY 23-24	\$ -	\$ (3,037,606)		
Carryforward from PY 21-22	\$ 1,664,291	\$ 2,571,925	\$ 907,634	64.710%
TOTAL	\$ 3,435,377	\$ 8,256,594	\$ 4,821,216	41.608%
% of Total Budgeted Funding Received	41.61%			
EXPENDITURES				
	PY 22-23 Actual	PY 22-23 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ 359,343	\$ 614,481	\$ 255,138	58.48%
Salaries and Benefits	\$ 231,070	\$ 469,158	\$ 238,088	49.25%
General and Administrative	\$ 128,273	\$ 145,323	\$ 17,050	88.27%
Allocated Indirect Costs	\$ 0	\$ 0	\$ 0	
Reclassification	\$ -	\$ -	\$ -	
Travel	\$ -	\$ -	\$ -	
Program Training	\$ 2,877,569	\$ 7,089,198	\$ 4,211,629	40.6%
WIOA Youth Contracts	\$ 390,982	\$ 750,000	\$ 359,018	52.1%
Salaries and Benefits	\$ 1,372,888	\$ 3,232,785	\$ 1,859,897	42.5%
Contract Labor	\$ 98,173	\$ 199,311	\$ 101,138	49.3%
Internship	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ 2,175	\$ 16,500	\$ 14,325	13.2%
Support Services Non-ITA	\$ 2,427	\$ 10,500	\$ 8,073	23.1%
Support Services ITA	\$ 520	\$ 105,185	\$ 104,665	0.5%
Training-ITA/OST/TAA	\$ 117,737	\$ 247,144	\$ 129,407	47.6%
Training-OJT	\$ 39,778	\$ 651,551	\$ 611,774	6.1%
Training-Cust./Employed Worker	\$ 38,000	\$ 50,000	\$ 12,000	76.0%
WEX/ Internships/ Participant Wages	\$ 115,879	\$ 328,460	\$ 212,581	35.3%
Travel	\$ 11,072	\$ 24,872	\$ 13,800	44.5%
One Stop Shared Costs	\$ 339,502	\$ 744,875	\$ 405,373	45.6%
Other Operating Expenses	\$ 348,438	\$ 728,015	\$ 379,577	47.9%
Allocated Program Indirect	\$ (0)	\$ (0)	\$ -	
Reclassification	\$ 0	\$ -	\$ 0	
Total Expenditures	\$ 3,236,913	\$ 7,703,679	\$ 4,466,767	42.0%
Funding Over/(under) expenditures	\$ 198,465			
YTD % of Budgeted Funds Expended	39.20%			

LWDB 20
Summary of Funding and Expenditures
As of February 28, 2023

PY 22-23 TOTAL AVAILABLE FUNDING	INDIRECT	10 ADULT	12 DW	11 YOUTH	122 Florida Rebuild	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	282 TAA
PY 22-23 Allocations		\$ 964,646	\$ 795,960	\$ 857,133	\$ -	\$ 773,417	\$ 481,855	\$ 252,197	\$ 173,093	\$ -	\$ -
PY 22-23 Supplemental		\$ -	\$ 246,460	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year		\$ -	\$ -	\$ -	\$ 32,721	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ (319,065)	\$ -	\$ (179,522)	\$ (116,207)	\$ -	\$ -
Carryforward to PY 23-24		\$ -	\$ (517,287)	\$ (578,590)	\$ -	\$ (49,086)	\$ (101,461)	\$ (41,935)	\$ (11,534)	\$ -	\$ -
Carryforward from PY 21-22		\$ -	\$ 985,700	\$ 594,618	\$ -	\$ 80,265	\$ 87,859	\$ 17,232	\$ 11,328	\$ 196,004	\$ 71,614
TOTAL	\$ -	\$ 964,646	\$ 1,510,833	\$ 873,161	\$ 32,721	\$ 485,531	\$ 468,253	\$ 47,972	\$ 56,680	\$ 196,004	\$ 71,614
FUNDING DRAWN DOWN YTD											
FUNDING DRAWN DOWN YTD	INDIRECT	10 ADULT	12 DW	11 YOUTH	122 Florida Rebuild	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	282 TAA
PY 22-23 Allocations		\$ 502,694	\$ -	\$ -	\$ -	\$ 182,688	\$ 121,278	\$ -	\$ 21,414	\$ 225,396	\$ -
PY 22-23 Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds		\$ -	\$ -	\$ -	\$ 5,112	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 23-24		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 21-22		\$ -	\$ 766,577	\$ 510,285	\$ -	\$ 80,265	\$ 87,859	\$ 22,075	\$ 11,328	\$ 196,004	\$ 209
TOTAL		\$ 502,694	\$ 766,577	\$ 510,285	\$ 5,112	\$ 262,953	\$ 209,137	\$ 22,075	\$ 32,742	\$ 421,400	\$ 209
% of Total Budgeted Funding Received		52.11%	50.74%	58.44%	15.62%	54.16%	44.66%	46.02%	57.77%	215.00%	0.29%
EXPENDITURES											
Administrative	\$ -	\$ 44,275	\$ 96,743	\$ 11,805	\$ 647	\$ 35,296	\$ 26,268	\$ 2,006	\$ 2,964	\$ 45,703	\$ 8
Salaries and Benefits	\$ 261,234	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 138,232	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (399,467)	\$ 156,449	\$ 9,570	\$ 11,805	\$ 647	\$ 10,296	\$ 26,268	\$ 2,006	\$ 2,964	\$ 45,703	\$ 8
Reclassification	\$ -	\$ (112,173)	\$ 87,173	\$ -	\$ -	\$ 25,000	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ 433,613	\$ 636,200	\$ 536,244	\$ 4,475	\$ 185,050	\$ 171,645	\$ 20,722	\$ 28,441	\$ 317,460	\$ 202
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 447,492	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 136,325	\$ 619,334	\$ 32,763	\$ 14,939	\$ 3,452	\$ 24,997	\$ 116,919	\$ 3,976	\$ 5,003	\$ 219,631	\$ 13
Contract Labor	\$ -	\$ 4,622	\$ 299	\$ -	\$ 4	\$ 43	\$ 13,000	\$ 10	\$ 22	\$ 9,141	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ 900	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services ITA	\$ -	\$ 451	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ 114,573	\$ 1,714	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-OJT	\$ -	\$ 36,538	\$ 1,672	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ 19,000	\$ 10,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 132	\$ 3,144	\$ 303	\$ 257	\$ 23	\$ 625	\$ 831	\$ 1,366	\$ 1,524	\$ 1,210	\$ -
One Stop Shared Costs	\$ -	\$ 130,427	\$ 6,752	\$ -	\$ 597	\$ 50,855	\$ 27,205	\$ 10,852	\$ 15,349	\$ 50,651	\$ 83
Other Operating Expenses	\$ 32,009	\$ 71,692	\$ 6,103	\$ 68,577	\$ 126	\$ 33,081	\$ 14,066	\$ 2,336	\$ 5,293	\$ 17,553	\$ 103
Allocated Program Indirect	\$ (168,466)	\$ 65,979	\$ 4,036	\$ 4,979	\$ 273	\$ 4,342	\$ 11,078	\$ 846	\$ 1,250	\$ 19,274	\$ 3
Reclassification	\$ -	\$ (633,046)	\$ 572,057	\$ -	\$ -	\$ 71,107	\$ (11,453)	\$ 1,335	\$ -	\$ -	\$ -
Total Expenditures	\$ 0	\$ 477,888	\$ 732,943	\$ 548,049	\$ 5,122	\$ 220,346	\$ 197,913	\$ 22,728	\$ 31,405	\$ 363,163	\$ 210
Funding Over/(under) expenditures	\$ 0	\$ 24,806	\$ 33,634	\$ (37,764)	\$ (10)	\$ 42,608	\$ 11,224	\$ (653)	\$ 1,338	\$ 58,236	\$ (1)
YTD % of Budgeted Funds Expended		49.54%	48.51%	62.77%	15.65%	45.38%	42.27%	47.38%	55.41%	185.28%	0.29%

LWDB 20
Summary of Funding and Expenditures
As of February 28, 2023

PY 22-23 TOTAL AVAILABLE FUNDING	39 DWG COVID-19	390 DWG Hurricane Ian	40 WTP	470 Apprent Navigator	473 Recovery Navigator	474 Rapid Response Navigator	475 FAWA	48 F.A.T.E.S.	792 Youth SOS SLC	Other Non NFA
PY 22-23 Allocations	\$ -	\$ 178,000	\$ 1,144,745	\$ 62,500	\$ -	\$ -	\$ 3,000,000	\$ -	\$ -	\$ -
PY 22-23 Supplemental	\$ -	\$ 180,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 74,342	\$ 300,000	\$ -
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 23-24	\$ (66,763)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (1,500,000)	\$ -	\$ -	\$ -
Carryforward from PY 21-22	\$ 129,310	\$ -	\$ 165,908	\$ -	\$ 166,510	\$ 65,577	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ 62,547	\$ 358,000	\$ 1,310,653	\$ 62,500	\$ 166,510	\$ 65,577	\$ 1,500,000	\$ 74,342	\$ 300,000	\$ -
FUNDING DRAWN DOWN YTD	39 DWG COVID-19	390 DWG Hurricane Ian	40 WTP	470 Apprent Navigator	473 Recovery Navigator	474 Rapid Response Navigator	475 FAWA	48 F.A.T.E.S.	792 Youth SOS SLC	Other Non NFA
PY 22-23 Allocations	\$ -	\$ 124,800	\$ 392,474	\$ 22,000	\$ -	\$ -	\$ 73,500	\$ -	\$ -	\$ -
PY 22-23 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 32,627
Additional Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 199,342	\$ 94,835	\$ -
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 23-24	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 21-22	\$ 5,010	\$ -	\$ 165,908	\$ -	\$ 94,140	\$ 17,632	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ 5,010	\$ 124,800	\$ 558,382	\$ 22,000	\$ 94,140	\$ 17,632	\$ 73,500	\$ 199,342	\$ 94,835	\$ 32,627
% of Total Budgeted Funding Received	8.01%	34.86%	42.60%	0.00%	56.54%	26.89%	4.90%	268.14%	31.61%	0.00%
EXPENDITURES										
Administrative	\$ 558	\$ 14,225	\$ 66,852	\$ 1,987	\$ 12,174	\$ 1,201	\$ 11,320	\$ 5,308	\$ 14,371	\$ 5,754
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ 558	\$ 14,225	\$ 66,852	\$ 1,987	\$ 12,174	\$ 1,201	\$ 11,320	\$ 5,308	\$ 14,371	\$ 5,754
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ 3,539	\$ 90,080	\$ 461,783	\$ 14,016	\$ 74,913	\$ 8,560	\$ 75,262	\$ 34,770	\$ 88,193	\$ 43,768
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 677	\$ 19,501	\$ 294,967	\$ 10,245	\$ 3,416	\$ 6,285	\$ 12,631	\$ 14,400	\$ 862	\$ 18,062
Contract Labor	\$ 2,400	\$ 6,301	\$ 9,958	\$ -	\$ 59,640	\$ 10	\$ 123	\$ 35	\$ 7,597	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ 2,175	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ -	\$ 818	\$ -	\$ -	\$ -	\$ -	\$ 709	\$ -	\$ -
Support Services ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 69	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,950	\$ -	\$ -
Training-OJT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,568
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,500	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ 53,247	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 73,509	\$ -
Travel	\$ -	\$ 52	\$ 1,612	\$ 65	\$ 917	\$ 51	\$ 26	\$ 48	\$ 83	\$ 161
One Stop Shared Costs	\$ -	\$ 3,840	\$ 64,254	\$ -	\$ 23	\$ 1,396	\$ 1,122	\$ 2,724	\$ 7	\$ 12,597
Other Operating Expenses	\$ 226	\$ 1,139	\$ 59,806	\$ 2,868	\$ 5,783	\$ 312	\$ 56,587	\$ 1,097	\$ 75	\$ 8,953
Allocated Program Indirect	\$ 235	\$ 5,999	\$ 28,193	\$ 838	\$ 5,134	\$ 507	\$ 4,774	\$ 2,239	\$ 6,061	\$ 2,427
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expenditures	\$ 4,097	\$ 104,305	\$ 528,635	\$ 16,003	\$ 87,087	\$ 9,762	\$ 86,582	\$ 40,078	\$ 102,564	\$ 49,522
Funding Over/(under) expenditures	\$ 913	\$ 20,495	\$ 29,747	\$ 5,997	\$ 7,053	\$ 7,870	\$ (13,082)	\$ 159,264	\$ (7,730)	\$ (16,895)
YTD % of Budgeted Funds Expended	6.55%	29.14%	40.33%	0.00%	52.30%	14.89%	5.77%	53.91%	34.19%	0.00%

LWDB 20
Summary of Funding and Expenditures
As of February 28, 2023

PY 22-23 TOTAL AVAILABLE FUNDING	YEAR TO DATE TOTALS			
PY 22-23 Allocations		\$ 8,683,546		
PY 22-23 Supplemental		\$ 426,460		
Unrestricted Funds Earned this year		\$ 32,721		
Additional Funds		\$ 374,342		
Retained by DEO for Merit Salaries		\$ (614,794)		
Carryforward to PY 23-24		\$ (2,866,656)		
Carryforward from PY 21-22		\$ 2,571,925		
TOTAL	\$ -	\$ 8,607,544		
FUNDING DRAWN DOWN YTD				
	PY 22-23 Actual	PY 22-23 Budget	VARIANCE	% Expended
PY 22-23 Allocations	\$ 1,666,245	\$ 8,683,546	\$ 7,017,302	19.189%
PY 22-23 Supplemental	\$ -	\$ 426,460	\$ 426,460	0.000%
Unrestricted Funds Earned this year	\$ 32,627	\$ 32,721	\$ 94	99.713%
Additional Funds	\$ 299,289	\$ 374,342	\$ 75,053	79.951%
Retained by DEO for Merit Salaries	\$ -	\$ (614,794)		
Carryforward to PY 23-24	\$ -	\$ (2,866,656)		
Carryforward from PY 21-22	\$ 1,957,291	\$ 2,571,925	\$ 614,634	76.102%
TOTAL	\$ 3,955,452	\$ 8,607,544	\$ 4,652,091	45.953%
% of Total Budgeted Funding Received	45.95%			
EXPENDITURES				
	PY 22-23 Actual	PY 22-23 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ 399,467	\$ 614,481	\$ 215,014	65.01%
Salaries and Benefits	\$ 261,234	\$ 469,158	\$ 207,923	55.68%
General and Administrative	\$ 138,232	\$ 145,323	\$ 7,091	95.12%
Allocated Indirect Costs	\$ (0)	\$ 0	\$ 0	
Reclassification	\$ -	\$ -	\$ -	
Travel	\$ -	\$ -	\$ -	
Program Training	\$ 3,228,934	\$ 7,089,198	\$ 3,860,264	45.5%
WIOA Youth Contracts	\$ 447,492	\$ 750,000	\$ 302,508	59.7%
Salaries and Benefits	\$ 1,558,396	\$ 3,232,785	\$ 1,674,389	48.2%
Contract Labor	\$ 113,205	\$ 199,311	\$ 86,106	56.8%
Internship	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ 2,175	\$ 16,500	\$ 14,325	13.2%
Support Services Non-ITA	\$ 2,427	\$ 10,500	\$ 8,073	23.1%
Support Services ITA	\$ 520	\$ 105,185	\$ 104,665	0.5%
Training-ITA/OST/TAA	\$ 121,237	\$ 247,144	\$ 125,907	49.1%
Training-OJT	\$ 39,778	\$ 651,551	\$ 611,774	6.1%
Training-Cust./Employed Worker	\$ 38,000	\$ 50,000	\$ 12,000	76.0%
WEX/ Internships/ Participant Wages	\$ 126,756	\$ 328,460	\$ 201,704	38.6%
Travel	\$ 12,428	\$ 24,872	\$ 12,444	50.0%
One Stop Shared Costs	\$ 378,734	\$ 744,875	\$ 366,141	50.8%
Other Operating Expenses	\$ 387,786	\$ 728,015	\$ 340,229	53.3%
Allocated Program Indirect	\$ (0)	\$ (0)	\$ -	
Reclassification	\$ 0	\$ -	\$ 0	
Total Expenditures	\$ 3,628,401	\$ 7,703,679	\$ 4,075,278	47.1%
Funding Over/(under) expenditures	\$ 327,051			
YTD % of Budgeted Funds Expended	42.15%			

AGENDA ITEM SUMMARY

TITLE: STRATEGIC	Local Targeted Occupations List (LTOL) for 4th Quarter of PY 22-23
GOAL	Strong Advancement of Existing and Emerging Local Targeted Industry Clusters
POLICY/PLAN/LAW	Workforce Innovation & Opportunity Act
ACTION REQUIRED	Review and Approve the LTOL for the 4th Quarter of Program Year 2022-2023
BACKGROUND	<p>The Department of Economic Opportunity's (DEO) Bureau of Labor Market Statistics (LMS) has published the 2022-2023 Statewide Targeted Occupations List on the DEO website. The Statewide Demand Occupations list identifies the labor market needs of Florida's business community and encourages job training based on those needs, with emphasis on jobs that are both high demand and high skill/high wage, and is used as a baseline for establishing the Local Targeted Occupations Lists (LTOLs). The Local Workforce Development Boards (LWDBs) develop and use their LTOLs to identify occupations for which eligible adults and dislocated workers may receive training assistance under the Workforce Innovation and Opportunity Act.</p> <p>Pursuant to CareerSource Florida policy, LWDBs are to develop their LTOLs, in consultation with local business and industry representatives, using the LMS-generated Demand Occupations Lists, as well as other resources, such as Help Wanted Online Lists and Supply/Demand lists. The LWDBs must publish their updated LTOLs on their websites and update them as they make changes. CareerSource Research Coast adopted a local policy to incorporate CareerSource Florida's LTOL policy and process. As part of our local policy, the LTOL is to be reviewed and approved on a quarterly basis in order to add occupations in demand or delete occupations that are declining.</p>
STAFF RECOMMENDATION	Staff reviewed local labor market information and resources regarding the LTOL. There is a recommended addition of occupations to the 4th Quarter of PY 2022-2023 list. Staff recommends approval of this LTOL for the 4th Quarter of PY 2022-2023.
SUPPORTING MATERIALS	CareerSource Research Coast Local Targeted Occupations List
BOARD STAFF	Tracey McMorris Vice President of Operations/COO tmcmorris@careersourcerc.com (866) 482-4473 ext. 528

2022-23 Local Targeted Occupations List

Sorted by Occupational Title

Workforce Development Area 20 - Indian River, Martin, and Saint Lucie Counties

Selection Criteria:

- 1 FLDOE Training Code 3 (PSAV Certificate), 4 (Community College Credit/Degree), or 5 (Bachelor's Degree)
- 2 30 annual openings and positive growth
- 3 Mean Wage of \$15.96/hour and Entry Wage of \$13.04/hour
- 4 High Skill/High Wage (HSHW) Occupations:
Mean Wage of \$25.00/hour and Entry Wage of \$15.96/hour

SOC Code†	HSHW††	Occupational Title†	Regional				Statewide				FLDOE Training Code	In EFI Targeted Industry?	Qualifying Level†††
			% Growth	Annual Openings	2020 Hourly Wage		% Growth	Annual Openings	2020 Hourly Wage				
					Mean	Entry			Mean	Entry			
132011	HSHW	Accountants and Auditors	0.02	152	38.67	22.81	1.59	8,177	36.04	21.46	5	Yes	R
113010	HSHW	Administrative Services and Facilities Managers	0.02	31	44.13	23.06	1.86	1,634	45.03	24.82	5	Yes	R
493011	HSHW	Aircraft Mechanics and Service Technicians	0.02	39	35.36	19.81	2.86	1,509	32.76	19.73	3	Yes	R
173011	HSHW	Architectural and Civil Drafters	1.00	22	26.92	19.09	0.70	923	28.56	20.28	3	Yes	R
274011		Audio and Video Technicians	0.02	3	21.56	13.33	3.63	932	24.00	14.18	4	No	S
493021		Automotive Body and Related Repairers	2.81	159	21.69	14.66	1.50	969	23.99	14.58	3	No	R
493023		Automotive Service Technicians and Mechanics	0.01	128	22.05	13.57	1.02	4,922	21.09	12.71	3	No	R
433031		Bookkeeping, Accounting, and Auditing Clerks	0.01	339	19.91	13.01	0.52	11,538	20.36	13.81	4	Yes	S
472021		Brickmasons and Blockmasons	1.20	89	18.67	14.00	0.60	555	20.56	15.38	3	No	R
493031		Bus and Truck Mechanics and Diesel Engine Specialists	0.02	26	25.77	20.11	1.63	1,356	24.01	16.64	3	Yes	S
533051		Bus Drivers, School or Special Client	-										
533052		Bus Drivers, Transit and Intercity	1.80	368	22.04	16.15	2.73	1,754	17.69	12.69	3	No	R
131199		Business Operations Specialists, All Other	-										
131020	HSHW	Buyers and Purchasing Agents	0.01	36	27.06	18.09	0.33	2,324	31.36	18.98	4	Yes	R
535021		Captains, Mates, and Pilots of Water Vessels	-0.02	2	30.06	13.53	1.96	532	39.00	14.77	3	Yes	S
251194	HSHW	Career/Technical Education Teachers, Postsecondary	1.43	90	29.89	16.56	1.13	665	26.91	15.97	4	Yes	R
435011		Cargo and Freight Agents	0.01	6	20.85	13.26	1.63	826	21.40	14.08	3	Yes	S
472031		Carpenters	0.02	212	20.05	14.89	1.29	6,614	20.22	14.57	3	No	R
472051		Cement Masons and Concrete Finishers	0.02	37	17.32	12.03	1.06	1,579	19.14	14.26	3	No	S
351011	HSHW	Chefs and Head Cooks	0.03	56	28.37	19.68	2.90	1,880	26.59	15.31	3	No	R
111011	HSHW	Chief Executives	0.23	100	87.88	38.48	0.17	2,249	93.09	36.88	5	Yes	R
131031	HSHW	Claims Adjusters, Examiners, and Investigators	0.00	9	39.03	21.69	0.34	2,054	31.58	20.20	3	Yes	S
212011		Clergy	0.01	55	27.07	14.83	1.10	1,426	26.29	14.98	5	No	R
292010		Clinical Laboratory Technologists and Technicians	0.02	27	23.45	14.00	1.67	1,607	25.47	15.07	4	Yes	S
532012	HSHW	Commercial Pilots	0.03	31	44.66	19.75	2.00	538	60.80	24.50	3	Yes	R
211099		Community and Social Service Specialists, All Other	0.02	37	23.83	16.85	1.30	1,274	20.53	15.05	5	No	R
131141	HSHW	Compensation, Benefits, and Job Analysis Specialists	0.02	6	24.86	16.57	1.94	688	27.61	18.52	4	Yes	S
131041	HSHW	Compliance Officers	0.01	30	33.61	18.69	1.48	2,245	33.00	17.49	3	Yes	R
151241	HSHW	Computer Network Architects	2.87	220	51.77	35.37	2.13	737	52.04	33.27	5	Yes	R
151231	HSHW	Computer Network Support Specialists	0.02	12	38.32	23.90	1.66	834	31.77	18.35	3	Yes	S
51-9161		Computer Numerically Controlled Tool Operators	0.40	12	22.21	16.88	0.30	509	20.87	14.57	3	Yes	R
151299	HSHW	Computer Occupations, All Other	0.02	14	30.59	17.24	1.64	1,186	38.03	19.27	3	Yes	S
151211	HSHW	Computer Systems Analysts	0.01	21	31.00	21.22	2.13	2,676	42.29	25.33	4	Yes	S
151232		Computer User Support Specialists	0.02	84	24.36	15.14	2.13	4,313	24.89	15.43	3	Yes	R
474011	HSHW	Construction and Building Inspectors	0.02	29	31.54	20.56	1.25	1,208	29.39	18.84	3	Yes	S
119021	HSHW	Construction Managers	0.03	70	56.31	31.77	2.10	3,342	50.70	28.86	4	No	R
131051	HSHW	Cost Estimators	0.02	36	29.71	19.37	1.10	1,318	31.39	19.39	4	No	R
151245	HSHW	Database Administrators and Architects	0.01	7	41.27	23.06	2.38	725	46.29	26.88	4	Yes	S
319091		Dental Assistants	0.02	65	20.86	16.84	1.51	2,649	19.80	15.22	3	Yes	R

2022-23 Local Targeted Occupations List

Sorted by Occupational Title

Workforce Development Area 20 - Indian River, Martin, and Saint Lucie Counties

Selection Criteria:

- 1 FLDOE Training Code 3 (PSAV Certificate), 4 (Community College Credit/Degree), or 5 (Bachelor's Degree)
- 2 30 annual openings and positive growth
- 3 Mean Wage of \$15.96/hour and Entry Wage of \$13.04/hour
- 4 High Skill/High Wage (HSHW) Occupations:
Mean Wage of \$25.00/hour and Entry Wage of \$15.96/hour

SOC Code†	HSHW††	Occupational Title†	Regional				Statewide				FLDOE Training Code	In EFI Targeted Industry?	Qualifying Level†††
			% Growth	Annual Openings	2020 Hourly Wage		% Growth	Annual Openings	2020 Hourly Wage				
					Mean	Entry			Mean	Entry			
291292	HSHW	Dental Hygienists	0.02	36	33.15	28.13	1.44	937	32.63	24.22	4	Yes	R
292032	HSHW	Diagnostic Medical Sonographers	3.73	85	33.62	27.10	2.78	472	32.68	24.16	3	Yes	R
472081		Drywall and Ceiling Tile Installers	2.17	162	19.05	14.76	1.41	787	17.95	12.46	3	No	R
173023	HSHW	Electrical and Electronic Engineering Technologists and Technicians	N/A	N/A	N/A	N/A	1.78	731	28.99	17.65	4	Yes	S
472111		Electricians	0.02	148	21.56	15.11	1.91	5,609	22.06	15.51	3	No	R
252021	HSHW	Elementary School Teachers, Except Special Education	0.01	140	29.88	20.34	0.89	5,795	27.66	17.68	5	No	R
512051		Fiberglass Laminators and Fabricators	0.02	46	17.16	13.80	1.14	332	17.32	13.15	3	Yes	R
132098	HSHW	Financial and Investment Analysts, Financial Risk Specialists, and Financial Specialists, All Other	0.02	31	32.83	18.39	1.86	2,229	36.70	20.72	3	Yes	R
113031	HSHW	Financial Managers	0.03	62	56.70	25.27	2.77	3,444	65.55	33.81	5	Yes	R
332011	HSHW	Firefighters	0.02	77	25.57	16.60	1.13	1,618	25.35	15.95	3	No	R
471011	HSHW	First-Line Supervisors of Construction Trades and Extraction Workers	0.02	147	32.00	19.79	1.60	5,670	30.37	19.97	4	No	R
371011		First-Line Supervisors of Housekeeping and Janitorial Workers	0.02	53	24.00	15.77	2.69	2,358	19.38	12.93	3	No	R
371012	HSHW	First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers	0.02	78	26.83	17.36	2.37	1,754	23.97	15.45	3	No	R
491011	HSHW	First-Line Supervisors of Mechanics, Installers, and Repairers	0.02	66	29.53	20.00	1.62	3,138	30.83	19.59	3	No	R
411012	HSHW	First-Line Supervisors of Non-Retail Sales Workers	0.00	40	33.84	21.55	0.40	2,343	40.97	22.70	4	No	R
431011	HSHW	First-Line Supervisors of Office and Administrative Support Workers	0.01	266	25.42	16.51	0.84	11,717	28.26	17.81	4	Yes	R
391098		First-Line Supervisors of Personal Service and Entertainment and Recreation Workers, Except Gambling Services	N/A	N/A	N/A	N/A	2.62	1,992	22.64	14.38	3	No	S
511011	HSHW	First-Line Supervisors of Production and Operating Workers	0.02	80	27.91	17.30	1.42	2,722	29.36	18.69	3	Yes	R
411011		First-Line Supervisors of Retail Sales Workers	0.01	296	22.10	14.08	0.88	10,637	22.76	14.22	3	No	R
531047		First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	0.02	46	28.59	14.86	1.75	2,868	27.03	16.93	3	Yes	R
119051		Food Service Managers	0.02	113	24.26	13.15	1.81	3,364	28.03	17.18	4	No	R
111021	HSHW	General and Operations Managers	0.02	315	46.25	21.48	1.92	14,755	51.80	23.11	4	Yes	R
472121		Glaziers	2.52	47	17.61	13.49	1.42	706	20.32	14.64	3	No	R
271024		Graphic Designers	0.01	22	20.38	15.46	1.43	1,759	24.81	15.68	4	Yes	S
292099	HSHW	Health Technologists and Technicians, All Other	-										
499021		Heating, Air Conditioning, and Refrigeration Mechanics and Installers	0.01	88	18.64	13.39	1.48	3,701	21.85	15.26	3	No	R
533032		Heavy and Tractor-Trailer Truck Drivers	0.02	212	20.34	14.53	1.34	12,116	20.74	13.91	3	No	R
131071	HSHW	Human Resources Specialists	0.02	89	25.39	16.51	1.74	4,239	29.54	18.50	5	Yes	R
499041		Industrial Machinery Mechanics	0.02	14	27.38	20.42	2.37	1,585	24.71	16.39	3	Yes	S
173026	HSHW	Industrial Engineering Technologists and Technicians	1.10	4	28.16	19.71	1.10	204	29.29	20.53	3	Yes	R
537051		Industrial Truck and Tractor Operators	N/A	N/A	N/A	N/A	1.22	3,260	18.48	13.27	3	Yes	S
151212	HSHW	Information Security Analysts	0.04	6	47.26	25.18	4.93	883	45.77	27.75	3	Yes	S
413021	HSHW	Insurance Sales Agents	0.02	88	30.56	17.57	1.49	5,427	29.60	15.06	3	Yes	R
252012	HSHW	Kindergarten Teachers, Except Special Education	0.01	42	30.96	25.28	0.90	906	27.84	19.05	5	No	R
292061		Licensed Practical and Licensed Vocational Nurses	0.02	173	23.57	19.37	1.72	4,214	22.45	18.33	3	Yes	R
132072	HSHW	Loan Officers	0.00	22	30.68	14.27	0.85	1,394	36.61	17.13	4	Yes	S
119081	HSHW	Lodging Managers	0.01	7	34.36	21.97	1.97	543	31.72	17.69	4	No	S
514041		Machinists	0.02	29	21.96	15.54	1.71	1,100	20.93	14.51	3	Yes	S

2022-23 Local Targeted Occupations List

Sorted by Occupational Title

Workforce Development Area 20 - Indian River, Martin, and Saint Lucie Counties

Selection Criteria:

- 1 FLDOE Training Code 3 (PSAV Certificate), 4 (Community College Credit/Degree), or 5 (Bachelor's Degree)
- 2 30 annual openings and positive growth
- 3 Mean Wage of \$15.96/hour and Entry Wage of \$13.04/hour
- 4 High Skill/High Wage (HSHW) Occupations:
Mean Wage of \$25.00/hour and Entry Wage of \$15.96/hour

SOC Code†	HSHW††	Occupational Title†	Regional				Statewide				FLDOE Training Code	In EFI Targeted Industry?	Qualifying Level†††
			% Growth	Annual Openings	2020 Hourly Wage		% Growth	Annual Openings	2020 Hourly Wage				
					Mean	Entry			Mean	Entry			
499071		Maintenance and Repair Workers, General	1.83	478	20.30	14.01	1.81	11,468	18.46	12.62	3	No	R
131111	HSHW	Management Analysts	0.03	108	37.88	19.99	2.47	7,009	40.46	20.29	5	Yes	R
119199	HSHW	Managers, All Other	-										
131161		Market Research Analysts and Marketing Specialists	0.03	86	23.49	14.33	3.46	5,811	29.84	15.98	5	Yes	R
319011		Massage Therapists	0.04	58	35.88	15.10	3.97	1,815	19.49	10.61	3	No	R
119111	HSHW	Medical and Health Services Managers	0.04	74	52.10	32.24	N/A	N/A	N/A	N/A	5	Yes	R
319092		Medical Assistants	0.03	207	16.08	13.08	3.14	8,736	16.74	13.51	3	Yes	R
292098		Medical Dosimetrists, Medical Records Specialists, and Health Technologists and Technicians, All Other	0.02	83	18.80	13.77	1.70	2,227	21.04	14.20	3	Yes	R
436013		Medical Secretaries and Administrative Assistants	0.02	107	16.48	13.07	1.88	4,369	16.89	13.17	3	Yes	R
131121		Meeting, Convention, and Event Planners	0.02	13	30.88	18.73	2.56	1,018	24.20	14.10	4	No	S
252022	HSHW	Middle School Teachers, Except Special and Career/Technical Education	0.01	87	31.06	24.66	0.89	2,512	28.76	20.07	5	No	R
493051		Motorboat Mechanics and Service Technicians	0.01	34	20.19	13.20	1.51	409	24.09	15.04	3	No	R
151244	HSHW	Network and Computer Systems Administrators	0.01	26	33.98	23.74	1.76	1,513	39.71	25.41	4	Yes	S
311131		Nursing Assistant	-										
472073		Operating Engineers and Other Construction Equipment Operators	0.01	83	20.55	16.79	1.32	2,593	20.44	14.77	3	No	R
472141		Painters, Construction and Maintenance	0.01	128	19.09	14.62	1.40	3,131	18.12	13.79	3	No	R
232011		Paralegals and Legal Assistants	0.01	82	22.93	17.94	1.95	3,937	25.10	16.95	3	Yes	R
292043		Paramedics	-										
132052		Personal Financial Advisors	0.01	30	47.22	13.77	1.88	1,837	49.46	17.41	5	No	R
119198	HSHW	Personal Service Managers, All Other; Entertainment and Recreation Managers, Except Gambling; and Managers, All Other	0.01	75	42.52	21.68	1.06	4,905	49.14	26.79	5	No	R
372021		Pest Control Workers	0.02	53	17.50	13.19	1.90	1,535	18.85	13.32	3	No	R
292052		Pharmacy Technicians	1.33	358	17.33	14.74	1.46	2,735	16.77	13.01	3	Yes	R
319097		Phlebotomists	0.03	38	17.52	14.83	2.86	1,116	16.68	13.36	3	Yes	R
312021	HSHW	Physical Therapist Assistants	0.04	29	29.30	21.17	3.82	1,121	30.28	21.23	4	Yes	S
472151		Pipelayers	1.76	148	20.45	15.43	1.26	458	18.94	14.79	3	Yes	R
472152		Plumbers, Pipefitters, and Steamfitters	0.01	75	23.14	15.89	1.49	3,412	21.92	15.59	3	No	R
333051	HSHW	Police and Sheriff's Patrol Officers	0.02	55	25.07	19.21	1.10	3,295	30.13	20.83	3	No	R
251199		Postsecondary Teachers, All Other	N/A	N/A	N/A	N/A	1.12	1,956	26.86	13.69	4	No	S
131198		Project Management Specialists and Business Operations Specialists, All Other	0.02	217	27.31	14.20	1.88	10,076	35.31	18.03	4	Yes	R
119141	HSHW	Property, Real Estate, and Community Association Managers	0.01	47	33.76	17.66	1.34	3,134	29.99	17.14	4	No	R
292053		Psychiatric Technicians	2.63	122	19.07	13.95	2.15	866	15.91	12.08	3	Yes	R
292034	HSHW	Radiologic Technologists and Technicians	0.02	27	22.20	17.18	1.71	1,023	27.69	19.63	3	Yes	S
419021		Real Estate Brokers	0.01	27	16.70	11.84	1.65	754	32.12	14.88	3	No	S
291141	HSHW	Registered Nurses	0.02	410	32.26	23.13	1.54	12,883	33.42	25.51	4	Yes	R
291126	HSHW	Respiratory Therapists	0.03	15	29.21	24.05	2.92	685	28.91	24.43	4	Yes	S
472181		Roofers	0.02	175	18.88	13.90	1.59	3,032	17.55	12.03	3	No	R
112022	HSHW	Sales Managers	0.01	38	56.43	31.39	1.92	2,636	64.65	30.50	5	Yes	R
414012		Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	0.02	246	31.90	13.57	1.19	9,272	31.64	14.78	3	Yes	R
414011	HSHW	Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	0.03	44	29.60	16.44	1.49	2,439	44.18	18.61	3	Yes	R
252031	HSHW	Secondary School Teachers, Exc. Special and Voc. Ed.	1.68	255	32.92	21.02	0.89	3,598	29.58	20.07	5	No	R

2022-23 Local Targeted Occupations List

Sorted by Occupational Title

Workforce Development Area 20 - Indian River, Martin, and Saint Lucie Counties

Selection Criteria:

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- 2 30 annual openings and positive growth
- 3 Mean Wage of \$15.96/hour and Entry Wage of \$13.04/hour
- 4 High Skill/High Wage (HSHW) Occupations:

Mean Wage of \$25.00/hour and Entry Wage of \$15.96/hour

SOC Code†	HSHW††	Occupational Title†	Regional				Statewide				FLDOE Training Code	In EFI Targeted Industry?	Qualifying Level†††
			Annual % Growth	Annual Openings	2020 Hourly Wage		Annual % Growth	Annual Openings	2020 Hourly Wage				
					Mean	Entry			Mean	Entry			
413031	HSHW	Securities, Commodities, and Financial Services Sales Agents	0.01	65	26.60	17.93	1.44	3,268	37.35	18.33	5	No	R
492098		Security and Fire Alarm Systems Installers	0.01	6	20.14	16.88	1.99	785	21.74	15.08	3	No	S
472211		Sheet Metal Workers	0.02	33	19.74	15.05	1.52	958	20.44	14.40	3	No	R
435071		Shipping, Receiving, and Traffic Clerks	0.04	151	17.37	13.04	0.24	3,140	16.56	12.25	3	Yes	R
211093		Social and Human Service Assistants	0.03	50	18.99	13.17	2.11	1,870	17.38	11.79	3	No	R
151256	HSHW	Software Developers and Software Quality Assurance Analysts and Testers	0.03	55	38.00	18.55	3.86	7,095	48.10	28.91	5	Yes	R
252058	HSHW	Special Education Teachers, Secondary School	-										
537065		Stockers and Order Fillers	1.80	938	16.07	12.91	1.60	36,046	16.22	12.32		Yes	R
472221		Structural Iron and Steel Workers	1.00	32	24.45	15.11	1.63	340	21.23	14.72	3	No	R
211018		Substance Abuse, Behavioral Disorder, and Mental Health Counselors	0.03	52	26.73	15.79	2.87	2,006	22.10	14.68	5	Yes	R
292055		Surgical Technologists	0.02	20	20.08	13.97	1.70	782	22.46	16.39	3	Yes	S
492022	HSHW	Telecommunications Equipment Installers and Repairers, Except Line Installers	0.00	40	25.57	20.37	1.04	2,280	27.56	18.44	3	No	R
499052		Telecommunications Line Installers and Repairers	1.14	30	23.02	16.91	1.19	658	22.12	15.84	3	No	R
472044		Tile and Stone Setters	N/A	N/A	N/A	N/A	2.53	771	18.88	14.33	3	No	S
131151	HSHW	Training and Development Specialists	0.02	82	26.73	16.04	2.02	2,403	29.14	15.75	5	Yes	R
113071	HSHW	Transportation, Storage, and Distribution Managers	1.34	114	51.58	28.71	1.44	542	46.81	27.29	4	Yes	R
319096		Veterinary Assistants and Laboratory Animal Caretakers	-										
292056		Veterinary Technologists and Technicians	3.79	42	16.86	13.27	3.39	1,020	17.07	12.50	4	Yes	R
151257	HSHW	Web Developers and Digital Interface Designers	0.02	16	23.56	14.37	2.35	803	32.55	18.24	3	Yes	S
514121		Welders, Cutters, Solderers, and Brazers	0.02	45	21.12	16.66	1.68	1,746	21.04	15.19	3	Yes	R

†SOC Code and Occupational Title refer to Standard Occupational Classification codes and titles.

††HSHW = High Skill/High Wage.

N/A = Not available (either due to lack of data, or as a result of suppression requirements to protect confidentiality).

†††Qualifying Level:

R = Meets regional wage and openings criteria based on state Labor Market Statistics employer survey data. Regional data are shown.

S = Meets statewide wage and openings criteria, but does not reach regional criteria based on state Labor Market Statistics employer survey data. Statewide data are shown.

NR = Not releasable.

EFI - Enterprise Florida, Inc.



REQUEST FOR ADDITION TO LOCAL TARGETED OCCUPATIONS LIST

Each occupation must meet the following:

- a. Positive Growth
- b. Entry Wage of \$13.04
- c. Mean Wage of \$15.96

To be considered High Skill/High Wage, occupations must meet the following:

- a. Entry Wage of \$15.96
- b. Mean Wage of \$25.00

Is this a critical occupation? Yes

Person completing this report: Shelly Batton

Please complete one form for each occupation you would like considered.

Occupation Title: Industrial Engineering Technologists & Technicians

Occupation SOC Code: 17-3026

Employer Name, Address, and Phone	Number of Current Full-Time Employees in this Occupation	Average Hourly Wage for These Employees	Projected Openings
MA Ford Manufacturing 1775 98th Avenue Vero Beach, FL	N/A	\$22.52 - \$29.78	1 (Employ Florida)
Perricone Farms/United Juice 505 66th Avenue Southwest Vero Beach, FL	N/A	\$23.00 - \$29.00	1 (Employ Florida)
LF Staffing 3725 20th Street Vero Beach, FL	N/A	\$25.00	1 (Employ Florida)
Eight additional employers throughout the Region listed positions in Indeed	N/A	\$18.00	8 (Indeed)

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.
Request for Addition to Local Targeted Occupations List – November 2022



REQUEST FOR ADDITION TO LOCAL TARGETED OCCUPATIONS LIST

Each occupation must meet the following:

- a. Positive Growth
- b. Entry Wage of \$13.04
- c. Mean Wage of \$15.96

To be considered High Skill/High Wage, occupations must meet the following:

- a. Entry Wage of \$15.96
- b. Mean Wage of \$25.00

Is this a critical occupation? Yes

Person completing this report: Shelly Batton

Please complete one form for each occupation you would like considered.

Occupation Title: Stockers & Order Fillers

Occupation SOC Code: 53-7065

Employer Name, Address, and Phone	Number of Current Full-Time Employees in this Occupation	Average Hourly Wage for These Employees	Projected Openings
Frito Lay 7464 Commercial Circle Ft. Pierce	N/A	\$15.00	1 (Employ Florida)
PepsiCo 3620 Crossroads Parkway Ft. Pierce	N/A	\$20.80	1 (Employ Florida)
Coca Cola Beverages 3939 St. Lucie Boulevard Ft. Pierce	N/A	\$13.26 - \$17.23	1 (Employ Florida)
Three additional employers throughout the region with positions listed in Employ Florida	N/A	\$13.45 - \$17.43	4 (Employ Florida)
Thirteen additional employers throughout the region listed positions in Indeed	N/A	\$16.05	13 (Indeed)

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.
Request for Addition to Local Targeted Occupations List – November 2022

AGENDA ITEM SUMMARY

Title	Application for Extension of Provider of Direct Services 2023-2026
Strategic Plans/Goals	Clear, Credible, and Trustworthy Commitments and Projects
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/CareerSource Florida Administrative Policy 083
Action Requested	Review and Approve Extension of Provider of Direct Services 2023-2024
Background	<p>WIOA allows Local Workforce Development Boards (LWDBs) to be designated as direct providers of intake, assessment, eligibility determination, or other services except for training services. This designation may occur only with the agreement of the Chief Elected Official and the Governor and must be approved by CareerSource Florida for a period not to exceed three years.</p> <p>CSRC’s designation as a Direct Service Provider expires June 30, 2023. Therefore, we are required to request another three-year extension as a direct provider of services through a structured application process. Documentation must also be provided that the Chief Elected Official has agreed to the planned extension.</p>
Staff Recommendations	Review and Approve Application for Extension of Provider of Direct Services 2023-2026
Supporting Material	Extension Request to Provide Direct Services
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>



The Workforce Development Board of the Treasure Coast d/b/a CareerSource Research Coast (CSRC), with the approval of our Treasure Coast Workforce Consortium and the Executive Committee of the CareerSource Research Coast Board of Directors (the full Board of Directors will meet on April 26, 2023) submits the following request of designation to CareerSource Florida, Inc., for approval.

This extension request follows the outline suggested by the requirements stated in CareerSource Florida, Inc. Administrative Policy #83. The information required by this guidance is as follows:

1. A review of how the direct provision of workforce services during the prior period fit the business model that the LWDB proposed in its original request and any proposed changes in the business model or the particular workforce services the LWDB intends to provide during the extension period.

The Workforce Development Board of the Treasure Coast, Inc. officially became the direct provider of workforce services for Indian River, St. Lucie, Martin, and Okeechobee counties on January 1, 2009. The business model proposed in the original request to provide direct services was fully implemented and has been consistently successful in reducing costs, improving operations, and achieving high-performance outcomes.

For both Program Years 2020-2021 and 2021-2022, CSRC exceeded eleven (11) of the eighteen (18) negotiated WIOA Primary Indicators of Performance targets and met six (6). As of the second quarter of Program Year 2022-2023, CSRC is exceeding eleven (11) of the eighteen (18) targets.

The Workforce Development Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast (CSRC) has operated the WIA and now WIOA Youth Programming through a Subrecipient Agreement since 2012. Through a competitively procured process, CSRC awarded Henkels & McCoy, Inc. an agreement for WIA Youth Program and Services on July 1, 2012. After performance reviews each year by the CSRC Youth Council and the full Board of Directors, the agreement was extended for two additional years. Effective April 1, 2016, Henkels & McCoy Inc., assigned their Training Services Division to Eckerd Youth Alternatives, Inc. The CSRC Board of Directors approved this assignment and the assumption of the WIOA Youth Program and Services Agreement by Eckerd Youth Alternatives, Inc. As required, CSRC issued a Request for Proposals for WIOA Youth Program and Services in February 2016. After the rating of a review committee and approval by the CSRC Youth Council, Executive Committee, and full Board of Directors, Eckerd Youth Alternatives, Inc was awarded a Subrecipient Agreement for the period of July 1, 2016, through June 30, 2021, dependent upon performance. After successful performance reviews by the CSRC Youth Council and the full Board of Directors over the same period, the agreement was continually extended. CSRC again competitively procured Eckerd Youth Alternatives to serve as the WIOA Youth Services Provider for the period of July 1, 2021, through June 30, 2026.

In accordance with WIOA legislation, the CSRC Board of Directors defined and approved the role and responsibilities of a One-Stop Operator at their January 2017 meeting. Through a formal procurement process, a One Stop Operator was selected and awarded the contract for the period of July 1, 2017 – June 30, 2021, with annual renewal based on performance. In January 2019, the One Stop Operator notified CSRC of their intent to terminate the contract on June 30, 2019. Subsequently, in March 2019, CSRC released a One-Stop Operator RFP to accept proposals from vendors for the period of July 1, 2019, through June 30, 2022. CSRC conducted an open and competitive procurement process and received one proposal, which was ultimately rejected by the CSRC Board of Directors. CSRC formally requested and received approval from the CareerSource Florida, Inc. Board of Directors to serve as the One Stop Operator through June 2022.

After two failed procurement processes to secure a One Stop Operator for the period of July 2022 through June 2026, CSRC again formally requested and received approval to serve as the One Stop Operator from the CareerSource Florida, Inc. Board of Directors meeting in September 2022. CSRC continues to serve in this capacity until a One Stop Operator is successfully procured.

2. The effective date for when the extension will begin.

The effective date for the extension will begin on July 1, 2023.



3. The period of time, not to exceed three years for when the extension will be in effect.

The extension of direct service delivery for CareerSource Research Coast will be in effect for the period of July 1, 2023 through June 30, 2026.

4. A review of the LWDB’s stated reasons in its original request why the LWDB has decided to directly provide the workforce services, and an explanation of how it is in the best interest of the LWDB’s customers that the LWDB continue to provide these services.

CareerSource Research Coast’s primary reasons for assuming direct management of regional operations included cost savings, the opportunity to have more local control over operations and performance and to promote more effective communication with staff, clients, business customers, community partners and the public at large.

As the provider of direct services, CSRC has continually reduced administrative costs, eliminated duplication, and experienced additional cost benefits in staffing when the administrative and program staff are united under the same organization. Given the budgetary challenges that LWDB 20 has met and will continue to meet, the streamlining of management and oversight duties will be a key strategy for service delivery and continued performance outcomes.

In order to create a high-quality Career Center system in LWDA 20, CSRC has developed the following vision, mission and goals:

VISION:

To be the catalyst empowering our communities toward economic success.

MISSION:

Provide Opportunities. Improve Lives.

GOALS:

- **Customer-Centric Culture:** Expand our ability to identify and exceed customer needs and expectations
- **Collaborative Partnerships:** Expand our ability to meet the diverse needs in our community.
- **Marketing:** Expand the awareness and understanding of the roles and responsibilities of CSRC and the resources, services our partners and we can provide.
- **Innovation:** Promote continuous improvement.
- **Talent management:** Be the best place to work.

5. A review of the effectiveness of the firewall established by the LWDB to clearly separate existing roles as oversight body to the LWDB’s workforce delivery system and its role as the direct provider of workforce services, and an explanation of changes to be made to the firewall.

The appropriate firewalls established by LWDB 20 guard against any conflict of interest and is described in detail in the Board’s Administrative Plan. These established firewalls were validated through the most recent, 2022 – 2023 Internal Control Questionnaire.

Through its governance structure and operational guidelines, CareerSource Research Coast ensures the separation of oversight and management responsibilities. The Board of Directors also provides broad oversight through a committee structure which, for the purpose of workforce system oversight, is the Programs and Services Committee. Day-to-day operational management is the role of the CSRC management team, with specific responsibility for system management. This team consists of Directors, Career Center Managers, and Program Managers, under the leadership of the Vice President of Operations/Chief Operations Officer. The Vice President of Operations/COO reports directly to the President/Chief Executive Officer. The President/CEO is the sole point of accountability to the Board of Directors in the management of local operations.

The day-to-day service delivery tasks are assigned to staff stationed at our Career Centers and service-delivery access points. CSRC staff and jointly managed staff from the Department of Economic Opportunity provide client and customer direct services, exclusive of occupational skills training.



CareerSource Research Coast’s firewall is also enhanced through the procurement of a contracted monitoring firm for all workforce programs. Program Managers for the Welfare Transition, Wagner Peyser, WIOA Adult, Dislocated, and Youth Programs provide continuous oversight and monitoring in their roles as subject matter experts.

Independent financial reporting and monitoring will continue to be contracted to a third party.

6. An identification of the grant programs(s) that currently fund the workforce service delivery model.

The workforce development system current funding sources include the following:

- Workforce Innovation and Opportunity Act, Title 1, Adults
- Workforce Innovation and Opportunity Act, Title 1, Dislocated Workers
- Workforce Innovation and Opportunity Act, Title 1, Youth
- Welfare Transition Program
- Supplemental Nutrition Assistance Program
- Wagner Peyser
- ReEmployment Services and Eligibility Assessment (RESEA) Program
- Trade Assistance Adjustment
- Jobs for Veterans State Grant
- St. Lucie County Board of County Commissioners Summer of Success Grant
- Indian River State College - USDOL YouthBuild 2.0 Grant
- Families Ascending Toward Economic Success (F.A.T.E.S.) Grant
- Florida Atlantic Workforce Alliance (FAWA) Grant

7. A cost analysis that documents the actual reduction in costs with the LWDB providing direct workforce services rather than contracting those services to another provider and an estimate of such costs and savings for the upcoming three-year period.

The actual reduction in costs with CareerSource Research Coast providing services rather than contracting service to another provider is as follows:

- Program Year 2011-2012: Cost savings of \$603,276.
- Program Year 2012-2013: Cost savings of \$664,638.
- Program Year 2013/2014: Cost savings of \$790,216.
- Program Year 2014/2015: Cost savings of \$697,590.
- Program Year 2015/2016: Cost savings of \$537,202.
- Program Year 2016/2017: Cost savings of \$648,367
- Program Year 2017/2018: Cost savings of \$636,363
- Program Year 2018/2019: Cost savings of \$580,280
- Program Year 2019/2020: Cost savings of \$614,421
- Program Year 2021/2022: Cost savings of \$556,456

In keeping with the trends of previous years’ savings, CSRC estimates an average cost savings of approximately \$600,000 per year over the next three years.

8. A review of any other realized improvement to service delivery and performance outcomes, and description of anticipated improvements.

As the Local Workforce Development Board for Local Workforce Development Area 20, CareerSource Research Coast continues to meet and exceed all performance outcomes. The following are examples of CSRC’s performance:

- Met the ITA Waiver Requirement each year since the waiver’s inception.
- Met and exceeded the Primary Indicators of Performance
- Consistently achieved minimal or no monitoring findings in the WIOA, SNAP, and TAA programs

Examples of our improvement to service delivery are listed below.

- CSRC serves as the sponsor of seven Registered Apprenticeship Programs (RAPs) and works with industry representatives and local businesses to develop new RAPs as needed. CSRC's current RAPs are Industrial Manufacturing Technician, Truss Design Technician, Distribution Logistics Technician, Marine Services Technician, Tech Support Specialist, Network Support Specialist, and Cybersecurity Technician.
- CSRC, the Indian River County Economic Development and area manufacturers collaborate with the Treasure Coast Technical College, Vero Beach, to develop a one-week manufacturing boot camp, to serve an underrepresented population of Indian River County and provide a mechanism for marketing apprenticeship opportunities available locally. The boot camps include tours at local manufacturing sites, hands-on activities, and soft skills to build a foundation on the benefits of a career path in manufacturing. There are slots allotted for graduating high school seniors selected through an application process. These individuals are offered the opportunity to go directly into the IMT Registered Apprenticeship, earning while they learn.
- CSRC hosts an annual Career Connect Conference, an industry-driven half-day conference that brings together 600 plus high school Juniors and Seniors to explore post-secondary training options, and career path opportunities in various industry sectors in demand. The conference features keynote speakers and sector industry leaders who engage students with hands-on career exploration opportunities, leadership skills, career readiness, and financial aid information
- In order to start building talent pipelines to meet the needs of sectors in demand, CSRC serves as a convener for the area's Workforce Readiness Taskforce, which together economic development agencies, educational providers, business leaders representing industry sectors in demand and community partners. The mission of this industry-led task force is to organize processes and leverage resources to support a focused sector-based talent development pipeline to meet the needs of employers and career seekers throughout the LWDA.
- CSRC is a partner of the Lincoln Park Common Good Initiative, a collaboration of Allegany Franciscan Ministries along with community residents and stakeholders to create opportunities, develop strategies and make investments that lead to positive life outcomes for people in Lincoln Park, an under-resourced community in Fort Pierce. In partnership with Lincoln Park Common Good Initiative, the Lincoln Park Career Pathways Initiative (LPCPI) was developed to provide career training and supportive services for participants in the initiative's manufacturing, logistics and health care training. CSRC works closely with economic development partners to develop employment opportunities for the participants who successfully complete the training and gain industry certifications.
- Summer of Success (SOS) is an innovative eight-week work-readiness training program consisting of soft skills training and work experience through paid internship. Youth ages 16-24 who reside within the participating County may apply. Priority of enrollment in Summer of Success is given, but not limited to, youth facing life barriers such as: criminal offenders, pregnant or parenting youth, youth with disabilities, youth living in a high poverty area, or youth identified as at-risk for street gang activity. SOS provides many young people with their first experience in the workplace, and every step from the online application to the exit evaluation at the end of the program is designed to closely mimic actual employment. Once the internship is complete, the participant will have positioned themselves to enter a Pre-Apprenticeship, Apprenticeship or OJT opportunity which will lead to increased wages, additional training, and nationally recognized certifications.
- CSRC sponsored a TANF Summer Youth Program from June 2022 through August 2022 that supported teen pregnancy prevention programs for 68 youth served through partnerships with the Boys and Girls Club of St. Lucie County, The Inner Truth Project, END IT Corp, and investHER Academy + Startup Smart Kids. CSRC intends to sponsor the TANF summer program whenever funding permits.
- In conjunction with the Children Services Councils and the Early Learning Coalitions and along with three additional LWDBs, CSRC was selected to participate in the F.A.T.E.S. Demonstration Project (2Gen). As part of a regional initiative, CSRC received funding under the Pathways to Prosperity Initiative to offer individualized career services to a cohort of thirty families in targeted neighborhoods within census tract areas of greatest poverty. Basic and intensive WIOA services, focusing on CSRC's sector strategies, are provided to select families receiving subsidized childcare to encourage career advancement and wage progression. These target families may be provided with career readiness and advancement counseling, coaching, soft-skills development, assistance with training and education, assistance with the cost of transportation, and job placement. Low-income families often experience a disincentive to progress in their wage earning and asset building when an increase in income will disqualify the household from continued access to supportive programs, such as affordable childcare. The design of the F.A.T.E.S. Demonstration

Project (2Gen) included addressing this “cliff effect” by integrating a three-year phase-out period to mitigate the fiscal cliff created by the abrupt termination of childcare benefits after reaching the maximum allowable household income.

- CSRS partners with community organizations to host the annual Homeless Veterans Stand Down which focuses on the local homeless Veteran population providing them with food, clothing, mobile showers, health screenings, haircuts, legal services, and much more.
- With special grant funding received during Program Years 2021-2022 and 2022-2023, CSRC deployed a Recovery Navigator to address the opioid crisis’ impact on the local workforce development area. CSRC’s Substance Use Disorder (SUD) initiative aims to enhance and build upon community infrastructure that effectively connects individuals in SUD recovery to employment resources while raising employers’ awareness of the benefits of hiring individuals from this nontraditional talent pipeline.
- To advance and promote the SUD Initiative, the Recovery Navigator serves as the Co-Chair of Drug-Free St. Lucie, a coalition of area leaders working to develop infrastructure for community-based public health approaches that lead to effective and sustainable reductions in alcohol, marijuana, and other substance use in St. Lucie County, FL, the area most significantly impacted by the opioid crisis. The Recovery Navigator also produces a monthly radio broadcast focused on SUD and individuals in recovery. The broadcast boosts awareness of SUD challenges, opportunities, and overall impacts on workforce development, but most importantly, features special guests highlighting SUD-supportive employers and successful employees. Guests representing trade associations, addiction treatment centers, Florida’s Department of Health, CareerSource program staff and partners, the Public Defender’s Office, therapists, and medical professionals have all participated in the broadcasts. CSRC’s SUD Initiative resulted in the development of the Recovery Support Specialist, Addiction Counselor, and Behavioral Health Technician Registered Apprenticeship Programs developed in collaboration with the Florida Behavioral Health Association.

Under direct service provision, CareerSource Research Coast experiences more control over day-to-day operations and performance, as well as better communications with staff, clients, customers, community partners and the public at large. With the implementation of WIOA and as the workforce climate changes or new initiatives and goals are set, CareerSource Research Coast has the proven ability to reorganize staff to create empowered teams with an emphasis on excellent customer service and outstanding performance.

9. Documentation that the public was provided a meaningful opportunity for review and comment on the proposed extension for a period not less than 10 days. (include any submitted comments)

A notice of the request of an extension of our designation as direct provider of workforce services was posted to the CareerSource Research Coast website on April 4, 2023 through April 14, 2023. The public was invited to submit their comments to the Vice President of Operations via an electronic form on CSRC’s website. Documentation of the website posting is included as **Attachment B**.

10. Documentation that the Chief Elected Official has agreed to the planned extension.

LWDA 20’s Treasure Coast Consortium (CLEO) reviewed and approved this extension request, as supported by the completed Request Extension form included as **Attachment A**.

11. Completed Request for Extension to Serve as a Direct Provider of Workforce Services

The completed Request for Extension is included as **Attachment A**

ATTACHMENTS:

- A.** Completed Request for Extension form
- B.** Documentation of Public Notice

REQUEST FOR EXTENSION

LOCAL WORKFORCE AREA INFORMATION

Name of Local Area: The Workforce Development Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast	
LWDB Number: LWDB 20	
Date of Submission: April 17, 2023	
Contact Person Name: Brian Bauer, President/CEO	Phone: (866) 482-4473 Email Address: bbauer@careersourcerc.com

AMENDMENT TO THE LOCAL WORKFORCE SERVICES PLAN

The Local Workforce Development Board seeks to extend its designation as a direct service provider of certain services by agreement of the Chief Elected Official and the Governor. This extension to the designation of the Local Workforce Development Board as a direct service provider of certain services is to be effective for the period July 1, 2023 through June 30, 2026.

The signatures below certify agreement to the request for extension submitted by the Local Workforce Development Board and the assurance that the Local Workforce Development Board will operate in accordance with this extension, its Workforce Service Plan, and applicable federal and state laws and regulations.


LOCAL WORKFORCE DEVELOPMENT BOARD CHAIRMAN

Name: Leslie Kristof	Title: Chair, Board of Directors
Signature:	Date:

LOCAL CHIEF ELECTED OFFICIAL

Name and Title: Commissioner Chris Dzadovsky, Chair Treasure Coast Workforce Consortium	County: Treasure Coast Workforce Consortium
Signature: <i>Chris Dzadovsky</i> <small>DocuSigned by: 52E818CA32604E4</small>	Date: 3/29/2023 12:59 PM EDT

The screenshot shows a web browser window with the CareerSource Research Coast website. The browser's address bar shows the URL: careersourcerc.com/about-careersource-research-coast-2/request-for-proposal-request-for-quote/. The website header includes the CareerSource Research Coast logo and navigation links for Employers, Job Seekers, Veterans, Youth, Events & Workshops, Resources, and Connect More. A dark blue banner at the top of the page reads "Public Notice / Request for Proposal / Request for Quotes". Below this, a welcome message states: "Welcome to the CareerSource Research Coast public notice/request for proposal/request for quote page. Here you will find all current Public Notice(s) and RFP / RFQ information (if available) as well as important documents regarding each request." A section titled "RFQ- Audit Services" contains a button for "RFQ 23-001-AS Audit Services". Below this, a "PUBLIC NOTICE:" section is highlighted with a red oval. It contains the following text: "NOTICE OF TEN-DAY PUBLIC COMMENT PERIOD" and "NOTE IS HEREBY GIVEN: Through this announcement, CareerSource Research Coast is soliciting public comment for its extension request to serve as a direct provider of workforce services for the period of July 1, 2023 through June 30, 2026. The public notice period will begin today, April 4, 2023 and end on April 14, 2023. Throughout the public notice period, CSRC's extension request to serve as a direct provider of workforce services document may be viewed by following the link below:". A button for "RFQ - Direct Provider of Workforce Services" is located below the notice. The Windows taskbar at the bottom shows the system clock as 3:24 PM on 4/4/2023, which is also circled in red.

 Administrative Policy		POLICY NUMBER 083
Title:	Direct Provider of Workforce Services	
Program:	Workforce Innovation and Opportunity Act	
Adopted:	November 13, 2013	
Effective:	December 21, 2017	

I. PURPOSE AND SCOPE

The purpose of this policy is to outline the processes for Local Workforce Development Boards (LWDBs) to:

1. Request designation as a direct provider of workforce services (other than training services);
2. Request an extension of a previous designation as a direct provider of workforce services; and
3. Submit annual performance reports.

II. BACKGROUND

WIOA allows LWDBs to be direct providers of basic and individualized career services (also referred to as “workforce services”), with the agreement of the Chief Elected Official in the local area, LWDB, and the Governor. LWDBs have the flexibility to award contracts for career services and are not required by statute to competitively procure providers of career services. WIOA regulations strongly encourage the use of a competitive procurement process in the selection of providers for program activities and services. Providers of youth and training services must be competitively procured.

Revision History

DEO FG 083 – Direct Service Provider Designation, November 18, 2013

III. AUTHORITY

Workforce Innovation and Opportunity Act of 2014, [Public Law 113-128](#), Sections 107(d)(10)(D); 107(g)(2); and 121(d)(4)(A)

[Workforce Innovation and Opportunity Act Final Rule](#), 20 CFR 679.410 and 20 CFR 679.430, August 19, 2016

Training and Employment Guidance Letter (TEGL) No. 15-16, [Workforce Innovation and Opportunity Act \(WIOA\) Competitive Selection of One-Stop Operators](#), January 17, 2017

Florida Statutes, [Section 445.007\(6\)](#)

IV. POLICY

LWDBs that wish to be designated as direct providers of workforce services (other than training services) must formally request to do so. The LWDB initiates the process by submitting a Statement of Intent to Serve as a Direct Provider of Workforce Services (see Section VI – Attachments), addressed to the President of CareerSource Florida, requesting permission to become a direct provider of workforce services (other than training services). The following items must be included with the statement and be incorporated into the LWDB's local WIOA plan upon approval of the request:

1. A description of the revised business model the LWDB has elected to follow, a description of the workforce services the LWDB plans to provide, and how the services will be delivered. This will include a reference to those items in the local WIOA plan that would change if the request is approved (at a minimum, the process for selecting service providers and the description of the local one-stop system), as well as a revised organization chart reflecting the proposed new structure and service delivery model.
2. The effective date for when the LWDB will begin to provide workforce services.
3. The period of time, not to exceed three years, the LWDB will directly provide workforce services. The request should include a description of any transitional period needed to ensure continuity in service delivery to the LWDB's customers.
4. A statement of the reason(s) why the LWDB has decided to directly provide the workforce services.
5. A description of how the LWDB will establish a firewall that clearly separates and defines its existing role as the oversight body for the LWDB's workforce delivery system from its new role as the direct provider of workforce services.
6. Identification of the grant program(s) that currently fund the workforce service delivery model and that will fund the LWDB's direct service activities.
7. The estimated cost of the services and results of a cost analysis that documents expected reduction in costs if the LWDB provides the workforce services rather than contracting those services to another provider.
8. A description of any other anticipated improvement to service delivery and performance outcomes.

9. Documentation that the public was provided at least 30 days' notice to review and comment on the proposed change in service delivery. Any submitted comments must be included.
10. Documentation that the Chief Elected Official has agreed to the planned change in service delivery.
11. The completed Statement of Intent to Serve as a Direct Provider of Workforce Services (see Section VI – Attachments).

LWDBs as Direct Providers and One-Stop Operators (OSOs)

LWDBs may serve as both a direct provider of workforce services (other than training services) and as the one-stop operator. LWDBs are not required to compete to serve as direct service providers, but are required to participate in the competitive procurement process to serve as the OSO as outlined in the [One-Stop Operator Procurement Administrative Policy 097](#). In cases where the LWDB is both the one-stop operator and a direct service provider, there must be firewalls and internal controls within the operator/service provider entity, as well as specific policies and procedures for oversight, monitoring, and evaluation of performance of the LWDB as the direct service provider, consistent with 20 CFR 679.430.

Requesting an Extension to Serve as a Direct Provider of Workforce Services

LWDBs are required to submit a Request for Extension to Serve as a Direct Provider of Workforce Services (see Section VI – Attachments) to operate as a direct provider of workforce services (other than training services) at least every three years. The LWDB must state they wish to extend their permission to be a direct provider of workforce services three months before the current approval expires. A request for extension must include the following:

1. A review of how the direct provision of workforce services during the prior period fit the business model that the LWDB proposed in its original request and any proposed changes in the business model or the particular workforce services the LWDB intends to provide during the extension period.
2. The effective date for when the extension will begin.
3. The period of time, not to exceed three years for when the extension will be in effect.
4. A review of the LWDB's stated reasons in its previous request why the LWDB has decided to directly provide workforce services, and an explanation of how it is still in the best interest of the LWDB's customers that the LWDB continue to provide these services.
5. A review of the effectiveness of the firewall established by the LWDB to clearly separate existing roles as oversight body for the LWDB's workforce delivery system and its role as the direct provider of workforce services, and an explanation of changes to be made to the firewall.
6. Identification of the grant program(s) that fund the workforce service delivery model.
7. A cost analysis that documents the actual reduction in costs with the LWDB providing workforce services rather than contracting those services to another provider and an estimate of such costs and savings for the upcoming three-year period.

8. A review of any other realized improvement to service delivery and performance outcomes and description of anticipated improvements.
9. Documentation that the public was provided at least a 10 days' notice to review and comment on the proposed extension. Any submitted comments must be included.
10. Documentation that the Chief Elected Official has agreed to the planned extension.
11. Completed Request for Extension to Serve as a Direct Provider of Workforce Services (see Section VI – Attachments).

Review and Approval Process

CareerSource Florida (CSF) and the Department of Economic Opportunity (DEO) will review the LWDB's request for permission to be a direct provider of workforce services or the request for an extension for compliance with statutory requirements and this policy. DEO will make a recommendation to CSF of whether or not to approve the LWDB's request to be designated as a direct provider of workforce services. The LWDB will be advised of the final decision after the CSF board action is taken. Approval for any single request shall be granted for a period of up to three years.

Required Annual Performance Report

LWDBs designated as direct provider of workforce services must submit a performance report at the end of each program year for which direct workforce services were provided. The report shall contain, at a minimum, the following:

1. An analysis of cost savings as a result of the LWDB providing direct workforce services.
2. A description of improvement in performance outcomes.
3. A description of any "best practices" that could be shared with other LWDBs.

The annual performance report will be due no later than October 15th each year (or when requested) and shall be submitted via email to DEO at: WIOA@deo.myflorida.com.

V. DEFINITIONS

Basic Career Services – Self-service and/or informational services that do not require participation in a workforce program, are universally accessible, and are available to all job seekers. These services require limited to no staff time and involvement.

Direct Provider of Workforce Services – An entity that provides basic and individualized career services (also referred to as "workforce services") to job seekers and/or employers. A service provider may be competitively procured or designated to provide organizations or job seekers with workforce services.

Firewall – Protective measures to ensure the transparency, integrity, proper oversight and management of internal processes.

Individualized Career Services – Staff assisted services offered to job seekers that involve significant staff time and customization to each individual’s need. Job seekers must be determined eligible for WIOA in order to receive these services. Individualized career services include services such as: specialized assessments, developing an individual employment plan, counseling, work experiences (including transitional jobs), and other similar services.

VI. ATTACHMENTS

[Statement of Intent to Serve as a Direct Provider of Workforce Services](#)

[Request for Extension to Serve as a Direct Provider of Workforce Services](#)

AGENDA ITEM SUMMARY

Title	Welfare Transition (WT) Program - Incentive Policy
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	N/A
Action Requested	Review and Approve Welfare Transition (WT) Program - Incentive Policy Revisions
Background	<p>Florida Statutes allow Local Workforce Development Boards (LWDBs) to provide incentives to WT participants to complete assigned activities. In addition, the LWDBs may determine the value of the incentive payments and create policies related to their use.</p> <p>The local policy was updated to increase incentive payment amounts and to provide additional opportunities for WT Program participants to earn incentive payments for the completion of activities.</p>
Staff Recommendations	Review and Approve the Welfare Transition (WT) Program - Incentive Policy Revisions
Supporting Material	Welfare Transition (WT) Program - Incentive Policy Revisions
Board Staff	<p>Tracey McMorris Vice President of Operations/COO tmcmorris@careersourcerc.com (866) 482-4473 ext. 528</p>



**WELFARE TRANSITION PROGRAM
INCENTIVE POLICY**

ORIGINAL APPROVAL DATE: 8/10/2011

~~LATEST~~ REVISION DATE: ~~11/7/2018~~ 04/14/2023

BOARD APPROVAL DATE: ~~12/19/2018~~ 04/26/2023

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PURPOSE

The purpose of this policy is to establish a uniform standard for CareerSource Research Coast's (CSRC) use of Incentive Payments for Welfare Transition (WT) Program participants.

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REFERENCES

Personal Responsibility and Work Opportunity Reconciliation Act, Federal Regulations (45CFR 263.11(b), and Florida Statute 414.085.

BACKGROUND

Florida Statutes allow Local Workforce Development Boards (LWDBs) to provide incentives to WT participants to complete assigned activities. In addition, the LWDBs may determine the value of the incentive payments and create policies related to their use.

POLICY:

It is the policy of CSRC to provide incentive payments to WT Program participants to encourage the completion of activities leading to self-sufficiency. Incentive payment amounts are based on the availability of funding.

INCENTIVE PAYMENT REQUIREMENTS:

All participants must either:

- Received cash assistance benefits in the month the incentive is earned or
- Cash assistance benefits closed within the previous three months from the date of request due to earnings generated from employment.

WT PROGRAM INCENTIVE PAYMENTS AND AMOUNTS*

CSRC provides the following incentives to WT participants as determined allowable and upon meeting the requirements listed for each:

- Obtainment of GED or high school diploma - \$100
- College Degree, Applied Technical Diploma, Nationally Recognized Credential, Industry Certification or State License - \$100 - *Participants may not receive an incentive if they do not complete the related credential for the program of study.*
- Unsubsidized Job Placement
 - o Full time (30 hours or more) employment - \$200
 - o Part time (29 hours or less) employment - \$100
 - o Employment incentive will only be requested after verification of employment and the receipt of the first full paystub.
- Completion of four consecutive weeks of participation (can be ongoing) - \$75
- Completion of a resume approved by a CSRC Workshop Instructor and completion of three approved job readiness workshops - ~~\$50~~
- Completion of three assessments in the Skills, Interests, and Proficiency Assessments workshop - ~~\$50~~
- Completion of each 75-hour Office Administration course - \$175
- Completion of two consecutive weeks of vocational training (can be ongoing) - \$75
- Completion of a WIOA intake and assessment with a CSRC (WIOA) Career Planner - \$25
- Completion of the Florida Ready to Work program, attainment of the Florida Soft Skills Credential, and attainment of the Florida Ready to Work Credential - \$150
- Retention of employment after case closure by DCF for earned income-
 - o 1st quarter following case closure \$50
 - o 2nd quarter following case closure \$50
 - o 3rd quarter following case closure \$50

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An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.
WTP - Incentive Policy - ~~April 2023~~ December 2018
Page 1 of 2



WELFARE TRANSITION PROGRAM
INCENTIVE POLICY

ORIGINAL APPROVAL DATE: 8/10/2011

LATEST REVISION DATE: ~~11/7/2018~~ 04/14/2023

BOARD APPROVAL DATE: ~~12/19/2018~~ 04/26/2023

• 4th quarter following case closure \$50

* The amount of incentive payments are subject to change based on the amount of Welfare Transition Program funding available and awarded to CSRC each program year.

Refer to the Following Documents:

Refer to ~~WTP - Incentive Procedure - December 2018~~

WTP - Issuance of Transportation and Incentive Payments Policy

Refer to ~~WTP - Issuance of Transportation Assistance and Incentive Payments Procedure - December 2018~~

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PURPOSE

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REFERENCES

Personal Responsibility and Work Opportunity Reconciliation Act, Federal Regulations (45CFR 263.11(b), and Florida Statue 414.085.

BACKGROUND

Florida Statutes allow Local Workforce Development Boards (LWDBs) to provide incentives to WT participants to complete assigned activities. In addition, the LWDBs may determine the value of the incentive payments and create policies related to their use.

POLICY:

It is the policy of CSRC to provide incentive payments to WT Program participants to encourage the completion of activities leading to self-sufficiency. Incentive payment amounts are based on the availability of funding.

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All participants must either:

- Received cash assistance benefits in the month the incentive is earned or
- Cash assistance benefits closed within the previous three months from the date of request due to earnings generated from employment.

WT PROGRAM INCENTIVE PAYMENTS AND AMOUNTS*

CSRC provides the following incentives to WT participants as determined allowable and upon meeting the requirements listed for each:

- Obtainment of GED or high school diploma - \$100
- College Degree, Applied Technical Diploma, Nationally Recognized Credential, Industry Certification or State License - \$100 - *Participants may not receive an incentive if they do not complete the related credential for the program of study.*
- Unsubsidized Job Placement
 - Full time (30 hours or more) employment - \$200
 - Part time (29 hours or less) employment - \$100
 - Employment incentive will only be requested after verification of employment and the receipt of the first full paystub.
- Completion of four consecutive weeks of participation (can be ongoing) - \$75
- Completion of a resume approved by a CSRC Workshop Instructor and completion of three approved job readiness workshops - \$75
- Completion of three assessments in the Skills, Interests, and Proficiency Assessments workshop - \$75
- Completion of each 75-hour Office Administration course - \$175
- Completion of two consecutive weeks of vocational training (can be ongoing) - \$75
- Completion of a WIOA intake and assessment with a CSRC (WIOA) Career Planner - \$25
- Completion of the Florida Ready to Work program, attainment of the Florida Soft Skills Credential, and attainment of the Florida Ready to Work Credential - \$150
- Retention of employment after case closure by DCF for earned income-
 - 1st quarter following case closure \$50
 - 2nd quarter following case closure \$50
 - 3rd quarter following case closure \$50



- 4th quarter following case closure \$50

* The amount of incentive payments are subject to change based on the amount of Welfare Transition Program funding available and awarded to CSRC each program year.

Refer to the Following Documents:

WTP - Incentive Procedure

WTP – Issuance of Transportation and Incentive Payments Policy

WTP - Issuance of Transportation Assistance and Incentive Payments Procedure

AGENDA ITEM SUMMARY

Title	Welfare Transition (WT) Program - Transitional Supportive Services Policy
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	N/A
Action Requested	Review and Approve Welfare Transition (WT) Program - Transitional Supportive Services Policy Revisions
Background	<p>Florida Statutes allow Local Workforce Development Boards (LWDBs) to provide transitional services to support families after they have exited the Temporary Cash Assistance program due to earned income. Florida Statutes allow LWDBs to provide transitional supportive services for a maximum of two years.</p> <p>The local policy was updated to expand access to transitional services for eligible participants.</p>
Staff Recommendations	Review and Approve the Welfare Transition (WT) Program - Transitional Supportive Services Policy Revisions
Supporting Material	Welfare Transition (WT) Program - Transitional Supportive Services Policy Revisions
Board Staff	<p>Tracey McMorris Vice President of Operations/COO tmcmorris@careersourcerc.com (866) 482-4473 ext. 528</p>



WELFARE TRANSITION POLICY TRANSITIONAL SUPPORTIVE SERVICES

ORIGINAL APPROVAL DATE: 03/18/2011

REVISION DATE: ~~9/2/2020~~ 04/14/2023

~~LAST-BOARD ACTION-APPROVAL DATE: 9/9/2020~~ 04/26/2023

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PURPOSE

The purpose of this policy is to establish a uniform standard for the delivery of transitional supportive services to transitional former participants in the Welfare Transition Program participants.

REFERENCES

Florida Statutes 445.028, 445.030, 445.031, and 445.032; Final Guidance AWI FG 04-020 Welfare Transition Transitional Child Care

BACKGROUND

Florida Statutes allow Local Workforce Development Boards (LWDBs) to provide transitional support services to support assist families with moving toward self-sufficiency after they have left exited the Temporary Cash Assistance (TCA) program due to earned income. Florida Statutes allow LWDBs to provide transitional supportive services for a maximum of two years.

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LOCAL POLICY

It is the policy of CareerSource Research Coast (CSRC) to provide transitional supportive services to eligible participants working at least 25-20 hours per week for a period of one two years following the closure of their TCA benefits due to employment earned income. Transitional supportive services are based on the availability of funding.

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CSRC provides the following transitional supportive services to participants as determined necessary and allowable:

- One year of assistance with childcare through the Early Learning Coalition.
- Transitional Education & Training (related to current employment or preparing for employment in another career).
- Excluding gas assistance, the support services listed in Welfare Transition Supportive Services Policy may be provided to transitional participants. Gas assistance is not offered as a transitional support service.

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Transitional Childcare

Participants receiving transitional childcare must attend one appointment every three months with a Career Planner. To confirm ongoing employment, participants must submit supporting documentation a copy of their paystub within two business days of their pay date to confirm ongoing employment. If paystubs are the supporting documentation is submitted late more than once without good cause, the transitional childcare service will be terminated and will not be reinstated.

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A two-parent household (The Florida Department of Children and Families (UP case TCA category ADCU)) may be eligible for 12 months two years of transitional childcare if one parent is working at least 25-20 hours per week and the other parent is either attending school full time (12 credit hours) or working for at least 20 hours per week.

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Individuals receiving Up-Front Diversion may be eligible for transitional childcare for one two years from the date the diversion payment was issued by the Florida Department of Children and Families.

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Refer to the Following Documents:

- WTP – Supportive Services Policy
- WTP – Up -Front Diversion Policy
- WTP – Supportive Services Procedure
- WTP – Transitional Supportive Procedure
- WTP – Up-Front Diversion Procedure

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An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

[Item - WTP-Transitional Supportive Services Policy-April 2023](#) [WTP-Transitional Supportive Services Policy-September 2020](#) [April 2023](#)



WELFARE TRANSITION POLICY
TRANSITIONAL SUPPORTIVE SERVICES
ORIGINAL APPROVAL DATE: 03/18/2011
REVISION DATE: ~~9/2/2020~~ 04/14/2023
~~LAST BOARD ACTION APPROVAL DATE: 9/9/2020~~ 04/26/2023

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An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

[Item - WTP-Transitional Supportive Services Policy-April 2023](#) [WTP-Transitional Supportive Services Policy-September-2020](#) [April 2023](#)

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PURPOSE

The purpose of this policy is to establish a uniform standard for the delivery of transitional supportive services to former Welfare Transition Program participants.

REFERENCES

Florida Statutes 445.028, 445.030, 445.031, and 445.032; Final Guidance AWI FG 04-020 Welfare Transition Transitional Child Care

BACKGROUND

Florida Statutes allow Local Workforce Development Boards (LWDBs) to provide transitional services to support families after they have exited the Temporary Cash Assistance (TCA) program due to earned income. Florida Statutes allow LWDBs to provide transitional supportive services for a maximum of two years.

LOCAL POLICY

It is the policy of CareerSource Research Coast (CSRC) to provide transitional supportive services to eligible participants working at least 20 hours per week for a period of two years following the closure of TCA benefits due to earned income. Transitional supportive services are based on the availability of funding.

CSRC provides the following transitional supportive services to participants as determined necessary and allowable:

- One year of assistance with childcare through the Early Learning Coalition.
- Transitional Education & Training (related to current employment or preparing for employment in another career).
- Excluding gas assistance, the support services listed in Welfare Transition Supportive Services Policy may be provided to transitional participants. Gas assistance is not offered as a transitional support service.

Transitional Childcare

Participants receiving transitional childcare must attend one appointment every three months with a Career Planner. To confirm ongoing employment, participants must submit supporting documentation within two business days of their pay date. If the supporting documentation is submitted late more than once without good cause, the transitional childcare service will be terminated and will not be reinstated.

A two-parent household (The Florida Department of Children and Families TCA category ADCU) may be eligible for two years of transitional childcare if one parent is working at least 20 hours per week and the other parent is either attending school full time (12 credit hours) or working for at least 20 hours per week.

Individuals receiving Up-Front Diversion may be eligible for transitional childcare for two years from the date the diversion payment was issued by the Florida Department of Children and Families.

Refer to the Following Documents:

- WTP – Supportive Services Policy
- WTP – Up -Front Diversion Policy
- WTP – Supportive Services Procedure
- WTP – Transitional Supportive Procedure
- WTP – Up-Front Diversion Procedure

AGENDA ITEM SUMMARY

Title	Welfare Transition (WT) Program - Program Requirements Policy
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	N/A
Action Requested	Review and Approve the Welfare Transition (WT) Program - Program Requirements Policy Revisions
Background	<p>In accordance with state and federal guidelines, the Department of Economic Opportunity (DEO) tasks each Local Workforce Development Board (LWDB) with implementing and administering the state's workforce programs, including WT, at the local Career Centers. The WT Program emphasizes work, self-sufficiency, and personal responsibility. The program is structured to enable participants to move from public assistance to economic self-sufficiency.</p> <p>To support the goals of the WT Program, the local policy was updated to expand access to transitional services for eligible participants.</p>
Staff Recommendations	Review and Approve the Welfare Transition (WT) Program - Program Requirements Policy Revisions
Supporting Material	Welfare Transition (WT) Program - Program Requirements Policy Revisions
Board Staff	<p>Tracey McMorris Vice President of Operations/COO tmcmorris@careersourcerc.com (866) 482-4473 ext. 528</p>



PURPOSE

The purpose of this policy is to create a uniform standard for CareerSource Research Coast (CSRC) in operating the Welfare Transition (WT) Program in accordance with the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 and Florida's Temporary Assistance for Needy Families State Plan.

BACKGROUND

In accordance with state and federal guidelines, the Department of Economic Opportunity (DEO) tasks each Local Workforce Development Board ([LWDB](#)) with implementing and administering the state's workforce programs, including WT, at the local Career Centers. The WT Program emphasizes work, self-sufficiency, and personal responsibility. The program is structured to enable participants to move from public assistance to economic self-sufficiency.

LOCAL POLICY

PROGRAM OPERATION

CSRC will operate a WT Program with designated Career Planners who will provide services from each CSRC Career Center throughout Local Workforce Development Area (~~LWDA~~) 20. Services will be provided to WT Program participants referred by Florida's Department of Children and Families (DCF) for mandatory participation and WT Program applicants referred by DCF for work registration and sanction compliance.

APPLICANT ENGAGEMENT

The Florida Statute 414.095 (2018) requires all non-exempt Temporary Cash Assistance (TCA) applicants to register for work at the ~~Local Workforce Development Board~~[LWDB](#). This process is referred to as work registration. CSRC, in conjunction with DEO, is responsible for administering work registration to applicants of TCA in the LWDA 20. CSRC is responsible for engaging applicants for sanction compliance once the individual has served the full penalty period based on the sanction level imposed by DCF.

MANDATORY ENGAGEMENT

Once the applicant's TCA benefits are approved, he/she is referred to CSRC as a mandatory participant. Federal Regulations (45 CFR Part 261.11) require the completion of an initial assessment of a participant's skills, work experience, barriers, and employability within 30 days of the date the participant is approved for TCA. A detailed, well-structured Individual Responsibility Plan (or Alternative Responsibility Plan) is created, and frequently updated, to guide the participant toward achieving his/ her education and employment goals leading to long-term self-sufficiency.

PROGRAM ACTIVITIES

TCA recipients who are not exempt from work requirements must participate in countable work activities for a specified number of hours per week/ per month. CSRC assigns program activities to WT Program participants in accordance with Florida's Work Verification Plan (2012). Individuals who are unable to participate in work activities due to a medical limitation, may be deferred from participation under Florida Statute, Chapter 414.065(4)(d)(e)&(f). This provision allows for assignment of work activities consistent with a participant's medical limitation. In addition, individuals identified as victims of domestic violence may be deferred from participating so he/she may focus on the family's immediate safety needs.



PENALTIES

As a condition of ongoing eligibility for TCA benefits, WT Program participants are required to participate in the program. Failure, without good cause, to become fully engaged in targeted activities assigned by the Career Planner to increase work skills or to remove/mitigate barriers may result in a sanction against the family's TCA and, potentially, Supplemental Nutrition Assistance Program benefits. Florida defines "good cause for failure to comply with work or alternative requirement activities" as the temporary inability to participate due to circumstances beyond the participant's control.

SUPPORT SERVICES AND INCENTIVES

CSRC provides support~~ive~~ services to WT Program participants, when allowable and necessary, to remove barriers to participation in work or alternative requirement plan activities and employment. In addition, CSRC provides incentive payments to WT Program participants to encourage the completion of activities leading to self-sufficiency.

TRANSITIONAL SUPPORT SERVICES

CSRC provides transitional support services to eligible participants working at least ~~25-20~~ hours per week for a period of ~~one-two~~ years following the closure of their TCA benefits because of earned income. Transitional support~~ive~~ services are based on the availability of funding.

COMMUNICATION

Florida Job Connect provides WT Program participants with the opportunity to *opt in to* receiving online communication. DEO has authorized the use of online communication through Florida Job Connect with participants who have selected this option. When participants elect to receive online communication, they are notified that failure to log in and review their correspondence could result in a loss of benefits from DCF. As virtual appointments are offered as an option to participants, digital signatures will be accepted from both the Career Planner and the participant.

Refer to the Following Documents:

- WTP – Domestic Violence Procedure
- WTP – Incentive Policy
- WTP – Individual Responsibility Plan Alternative Requirements Plan
- WTP – Individual Responsibility Plan Alternative Requirements Procedure
- WTP – Medical Incapacity Policy
- WTP – Medical Incapacity Procedure
- WTP – Pre-Penalty and Sanction Policy
- WTP – Pre-Penalty and Sanction Procedure
- WTP – Support~~ive~~ Services Policy
- WTP – Support~~ive~~ Services Procedure
- WTP – Transitional Support~~ive~~ Services Policy
- WTP – Transitional Support~~ive~~ Services Procedure
- WTP – Work Registration Policy
- WTP – Work Registration Procedure



PURPOSE

The purpose of this policy is to create a uniform standard for CareerSource Research Coast (CSRC) in operating the Welfare Transition (WT) Program in accordance with the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 and Florida's Temporary Assistance for Needy Families State Plan.

BACKGROUND

In accordance with state and federal guidelines, the Department of Economic Opportunity (DEO) tasks each Local Workforce Development Board (LWDB) with implementing and administering the state's workforce programs, including WT, at the local Career Centers. The WT Program emphasizes work, self-sufficiency, and personal responsibility. The program is structured to enable participants to move from public assistance to economic self-sufficiency.

LOCAL POLICY

PROGRAM OPERATION

CSRC will operate a WT Program with designated Career Planners who will provide services from each CSRC Career Center throughout Local Workforce Development Area 20. Services will be provided to WT Program participants referred by Florida's Department of Children and Families (DCF) for mandatory participation and WT Program applicants referred by DCF for work registration and sanction compliance.

APPLICANT ENGAGEMENT

The Florida Statute 414.095 (2018) requires all non-exempt Temporary Cash Assistance (TCA) applicants to register for work at the LWDB. This process is referred to as work registration. CSRC, in conjunction with DEO, is responsible for administering work registration to applicants of TCA in the LWDA 20. CSRC is responsible for engaging applicants for sanction compliance once the individual has served the full penalty period based on the sanction level imposed by DCF.

MANDATORY ENGAGEMENT

Once the applicant's TCA benefits are approved, he/she is referred to CSRC as a mandatory participant. Federal Regulations (45 CFR Part 261.11) require the completion of an initial assessment of a participant's skills, work experience, barriers, and employability within 30 days of the date the participant is approved for TCA. A detailed, well-structured Individual Responsibility Plan (or Alternative Responsibility Plan) is created, and frequently updated, to guide the participant toward achieving his/ her education and employment goals leading to long-term self-sufficiency.

PROGRAM ACTIVITIES

TCA recipients who are not exempt from work requirements must participate in countable work activities for a specified number of hours per week/ per month. CSRC assigns program activities to WT Program participants in accordance with Florida's Work Verification Plan (2012). Individuals who are unable to participate in work activities due to a medical limitation, may be deferred from participation under Florida Statute, Chapter 414.065(4)(d)(e)&(f). This provision allows for assignment of work activities consistent with a participant's medical limitation. In addition, individuals identified as victims of domestic violence may be deferred from participating so he/she may focus on the family's immediate safety needs.



PENALTIES

As a condition of ongoing eligibility for TCA benefits, WT Program participants are required to participate in the program. Failure, without good cause, to become fully engaged in targeted activities assigned by the Career Planner to increase work skills or to remove/mitigate barriers may result in a sanction against the family's TCA and, potentially, Supplemental Nutrition Assistance Program benefits. Florida defines "good cause for failure to comply with work or alternative requirement activities" as the temporary inability to participate due to circumstances beyond the participant's control.

SUPPORT SERVICES AND INCENTIVES

CSRC provides supportive services to WT Program participants, when allowable and necessary, to remove barriers to participation in work or alternative requirement plan activities and employment. In addition, CSRC provides incentive payments to WT Program participants to encourage the completion of activities leading to self-sufficiency.

TRANSITIONAL SUPPORT SERVICES

CSRC provides transitional support services to eligible participants working at least 20 hours per week for a period of two years following the closure of their TCA benefits because of earned income. Transitional supportive services are based on the availability of funding.

COMMUNICATION

Florida Job Connect provides WT Program participants with the opportunity to *opt in to* receiving online communication. DEO has authorized the use of online communication through Florida Job Connect with participants who have selected this option. When participants elect to receive online communication, they are notified that failure to log in and review their correspondence could result in a loss of benefits from DCF. As virtual appointments are offered as an option to participants, digital signatures will be accepted from both the Career Planner and the participant.

Refer to the Following Documents:

- WTP – Domestic Violence Procedure
- WTP – Incentive Policy
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- WTP – Medical Incapacity Policy
- WTP – Medical Incapacity Procedure
- WTP – Pre-Penalty and Sanction Policy
- WTP – Pre-Penalty and Sanction Procedure
- WTP – Supportive Services Policy
- WTP – Supportive Services Procedure
- WTP – Transitional Supportive Services Policy
- WTP – Transitional Supportive Services Procedure
- WTP – Work Registration Policy
- WTP – Work Registration Procedure

AGENDA ITEM SUMMARY

Title	Supplemental Nutrition Assistance Program (SNAP) - Program Requirements Policy
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	N/A
Action Requested	Review and Approve the Supplemental Nutrition Assistance Program (SNAP) - Program Requirements Policy Revisions
Background	<p>The SNAP E&T Program is funded by the United States Department of Agriculture’s Food and Nutrition Services. Florida’s SNAP E&T Program is designed to assist eligible SNAP E&T participants obtain skills through education, training, or work experience to increase the skills necessary for self-sufficient employment. The Department of Economic Opportunity (DEO), in partnership with the Local Workforce Development Boards, is responsible for the administration of the SNAP E&T Program.</p> <p>The local policy was updated to reflect a change in the process for initial program engagement, the renaming of DEO’s initial engagement letter, and the removal of two work activity components no longer offered through the SNAP E&T Program.</p>
Staff Recommendations	Review and Approve the Supplemental Nutrition Assistance Program (SNAP) - Program Requirements Policy Revisions
Supporting Material	Supplemental Nutrition Assistance Program (SNAP) - Program Requirements Policy Revisions
Board Staff	<p>Tracey McMorris Vice President of Operations/COO tcmorris@careersourcerc.com (866) 482-4473 ext. 528</p>



SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM
 PROGRAM REQUIREMENTS POLICY
 ORIGINAL APPROVAL DATE: 3/9/2016
 REVISION DATE: ~~3/3/2021~~4/14/2023
 BOARD EFFECTIVE DATE: ~~4/28/2021~~4/26/2023

PURPOSE

The purpose of this policy is to provide guidance to CareerSource Research Coast (CSRC) in operating the Supplemental Nutrition Assistance Program (SNAP) in accordance with the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 and the SNAP Employment and Training (E&T) Florida State Plan.

REFERENCES

Personal Responsibility and Work Opportunity Reconciliation Act of 1996 and the SNAP Employment and Training Florida State Plan.

BACKGROUND

The SNAP E&T Program is funded by the United States Department of Agriculture’s Food and Nutrition Services. Florida’s SNAP E&T Program is designed to assist eligible SNAP E&T participants obtain skills through education, training, or work experience to increase the skills necessary for self-sufficient employment. The Department of Economic Opportunity (DEO), in partnership with the Local Workforce Development Boards, is responsible for the administration of the SNAP E&T Program.

A SNAP participant is an Able-Bodied Adult Without Dependents who is required to participate in work activities to maintain eligibility for assistance. An ABAWD is an individual who meets the following criteria:

- Is between ages 18-49
- Is not in school at least half-time
- Does not work at least 20 hours per week
- Does not earn at least \$217.50 per week
- Does not have a documented medical limitation
- Does not meet other criteria, outlined by federal regulations, preventing them from working

LOCAL POLICY

PROGRAM OPERATION:

CSRC will operate a mandatory SNAP program with designated Career Planners who will provide services from each CSRC Career Center throughout Local Workforce Development Area (LWDA) 20. Services will be provided to Able Bodied Adults without Dependents (ABAWDs), also known as SNAP participants, who are referred by the Florida Department of Children and Families (DCF) for participation.

INITIAL ENGAGEMENT:

Once DEO receives the ABAWD referral from Florida’s Department of Children and Families, an initial engagement letter (~~Employment & Training Referral~~~~Notice of Mandatory Participation~~) is mailed to the participant. The ABAWD has seven days from the letter’s mail date to register on the One Stop Service Tracking (OSST) system, complete an online orientation/assessment, and schedule an initial appointment ~~via the online calendar embedded within the OSST website. Once the SNAP participant completes the online initial engagement components and selects the “set appointment” icon, he/she is notified to contact CSRC within three business days to schedule a date/time for the initial appointment. In the One Stop Service Tracking (OSST) system, the Career Planner will schedule the appointment within the SNAP E&T activity and mail an appointment letter to the participant. Initial appointments are offered on designated days/times at each Career Center. During the initial appointment, the CSRC Career Planner will provide the~~

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SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM
 PROGRAM REQUIREMENTS POLICY
 ORIGINAL APPROVAL DATE: 3/9/2016
 REVISION DATE: ~~3/3/2021~~4/14/2023
 BOARD EFFECTIVE DATE: ~~4/28/2021~~4/26/2023

~~participant with an~~ Prior to the individual initial appointments, the Career Planner will conduct a group orientation tailored to the local service delivery method. ~~The participant will be offered the choice of attending either a virtual or an in-person appointment.~~

PROGRAM ACTIVITIES:

CSRC assigns program activities to SNAP participants in accordance with the SNAP E&T Florida State Plan. CSRC offers the following program activities: Job Search, Job Search Training, Education, ~~and~~ Vocational Training, ~~Workforce Innovation and Opportunity Act (WIOA), Trade Adjustment Act (TAA),~~ and Work Experience.

All program activities follow the guidance of the SNAP E&T State Plan. Clarification for the Education and Vocational Training activity is provided in this policy.

Education and Vocational Training

Tuition assistance for the GED program and English as a Second Language (ESL/ESOL) program may be provided to SNAP participants who demonstrate the need. The education program costs must be associated with SNAP E&T Program engagement. Tuition assistance will only be provided to SNAP participants in compliance with the program.

Participants attending classroom training under this program activity may be eligible to receive one hour of study time for each hour of class attendance completed on his/her weekly time sheet.

Communication

Florida Job Connect provides SNAP participants with the opportunity to *opt into* receiving online communication. DEO has authorized the use of online communication through Florida Job Connect with participants who have selected this option. When participants elect to receive online communication, they are notified that failure to log in and review their correspondence could result in a loss of benefits from DCF.

As virtual appointments are offered as an option to participants, digital signatures will be accepted from both the Career Planner and the participant.

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PURPOSE

The purpose of this policy is to provide guidance to CareerSource Research Coast (CSRC) in operating the Supplemental Nutrition Assistance Program (SNAP) in accordance with the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 and the SNAP Employment and Training (E&T) Florida State Plan.

REFERENCES

Personal Responsibility and Work Opportunity Reconciliation Act of 1996 and the SNAP Employment and Training Florida State Plan.

BACKGROUND

The SNAP E&T Program is funded by the United States Department of Agriculture's Food and Nutrition Services. Florida's SNAP E&T Program is designed to assist eligible SNAP E&T participants obtain skills through education, training, or work experience to increase the skills necessary for self-sufficient employment. The Department of Economic Opportunity (DEO), in partnership with the Local Workforce Development Boards, is responsible for the administration of the SNAP E&T Program.

A SNAP participant is an Able-Bodied Adult Without Dependents who is required to participate in work activities to maintain eligibility for assistance. An ABAWD is an individual who meets the following criteria:

- Is between ages 18-49
- Is not in school at least half-time
- Does not work at least 20 hours per week
- Does not earn at least \$217.50 per week
- Does not have a documented medical limitation
- Does not meet other criteria, outlined by federal regulations, preventing them from working

LOCAL POLICY

PROGRAM OPERATION:

CSRC will operate a mandatory SNAP program with designated Career Planners who will provide services from each CSRC Career Center throughout Local Workforce Development Area (LWDA) 20. Services will be provided to Able Bodied Adults without Dependents (ABAWDs), also known as SNAP participants, who are referred by the Florida Department of Children and Families (DCF) for participation.

INITIAL ENGAGEMENT:

Once DEO receives the ABAWD referral from Florida's Department of Children and Families, an initial engagement letter (Employment & Training Referral) is mailed to the participant. The ABAWD has seven days from the letter's mail date to register on the One Stop Service Tracking (OSST) system, complete an online orientation/assessment, and schedule an initial appointment via the online calendar embedded within the OSST website. Initial appointments are offered on designated days/times at each Career Center. Prior to the individual initial appointments, the Career Planner will conduct a group orientation tailored to the local service delivery method.



PROGRAM ACTIVITIES:

CSRC assigns program activities to SNAP participants in accordance with the SNAP E&T Florida State Plan. CSRC offers the following program activities: Job Search, Job Search Training, Education, Vocational Training, and Work Experience.

All program activities follow the guidance of the SNAP E&T State Plan. Clarification for the Education and Vocational Training activity is provided in this policy.

Education and Vocational Training

Tuition assistance for the GED program and English as a Second Language (ESL/ESOL) program may be provided to SNAP participants who demonstrate the need. The education program costs must be associated with SNAP E&T Program engagement. Tuition assistance will only be provided to SNAP participants in compliance with the program.

Participants attending classroom training under this program activity may be eligible to receive one hour of study time for each hour of class attendance completed on his/her weekly time sheet.

Communication

Florida Job Connect provides SNAP participants with the opportunity to *opt into* receiving online communication. DEO has authorized the use of online communication through Florida Job Connect with participants who have selected this option. When participants elect to receive online communication, they are notified that failure to log in and review their correspondence could result in a loss of benefits from DCF.

As virtual appointments are offered as an option to participants, digital signatures will be accepted from both the Career Planner and the participant.

AGENDA ITEM SUMMARY

Title	Training Provider Recommendation - Treasure Coast Medical Institute
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	N/A
Action Requested	Review and Approve Training Provider Recommendation
Background	<p>Providers of training services may apply for initial eligibility by completing a CareerSource Research Coast (CSRC) application for inclusion on the local list of eligible training providers. Applications received are reviewed by two CSRC staff members to confirm all required documentation is provided and minimal performance levels have been met. If the review team determines the provider has submitted all required documentation and met minimal performance levels, the application will be reviewed by a rating team based on a 100-point scale. The average score of the team must be 75 for the application to be presented for approval.</p>
Staff Recommendations	Review and Approve the Recommendation for Training Provider Treasure Coast Medical Institute to be added to the Eligible Training Provider List (ETPL)
Supporting Material	Training Provider Rating Team Compilation
Board Staff	Tracey McMorris Vice President of Operations/COO tmcmorris@careersourcerc.com (866) 482-4473 ext. 528

TRAINING PROVIDER RATING TEAM COMPILATION

Training Provider: Treasure Coast Medical Institute


Rating Team Captain: Shelly Batton

Rating Team Members: 1. Shelly Batton 2. Christina Coble
3. Kate Sayger 4. Rachel Pamer
5.

Recommended: Yes No

Raters	Rated Elements					Total	Comments
	Instructional Methods (20 pts max)	LTOL (20 pts max)	Cost (20 pts max)	Performance (20 pts max)	Quality of Training (20 pts max)		
Rater 1	20	20	15	20	20	95	
Rater 2	20	20	15	20	15	90	
Rater 3	20	20	15	20	20	95	
Rater 4	15	20	15	20	15	85	
AVERAGE						91.25	

As rating team captain, I Shelly Batton attest that this recommendation and these scores were submitted by Rating Team members.

Rating Team Captain Signature: 

Date: 3/20/2023

AGENDA ITEM SUMMARY

Title	LWDB 20 Primary Indicators of Performance for Program Year (PY) 2022-2023 2nd Quarter
Strategic Plans/Goals	Clear, Credible, and Trustworthy Commitments and Projects
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA) Title I Programs and Title III Wagner-Peyser (WP) Act; Training and Employment Guidance Letter No. 09-20
Action Requested	For Information Only
Background	<p>The State of Florida must negotiate and agree upon performance levels for WIOA, and WP programs funded by the United States Department of Labor, Employment, and Training Administration. Once the state levels are established, the Department of Economic Opportunity (DEO) must negotiate and reach agreements with the Local Workforce Development Boards for their local performance targets.</p> <p>Staff will review CareerSource Research Coast's performance for the 2nd quarter of PY2022-2023.</p>
Staff Recommendations	None
Supporting Material	LWDB 20 PY2022-2023 2nd Quarter Performance
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

LWDB 20

Measures	PY2021-2022 4th Quarter Performance	PY2021-2022 % of Performance Goal Met For Q4	PY2021-2022 Performance Goals	PY2022-2023 1st Quarter Performance	PY2022-2023 % of Performance Goal Met For Q1	PY2022-2023 2nd Quarter Performance	PY2022-2023 % of Performance Goal Met For Q2	PY2022-2023 Performance Goals
Adults:								
Employed 2nd Qtr After Exit	91.80	96.63	95.00	90.9	99.24	89.90	98.14	91.60
Median Wage 2nd Quarter After Exit	\$12,545	140.96	\$8,900	\$11,826	128.50	\$11,925	129.58	\$9,203
Employed 4th Qtr After Exit	92.80	97.68	95.00	94.9	104.17	88.30	96.93	91.10
Credential Attainment Rate	93.40	131.55	71.00	92.9	105.57	89.70	101.93	88.00
Measurable Skill Gains	100.00	149.25	67.00	85.6	100.35	85.40	100.12	85.30
Dislocated Workers:								
Employed 2nd Qtr After Exit	78.60	87.33	90.00	76.00	86.36	74.10	84.20	88.00
Median Wage 2nd Quarter After Exit	\$10,109	129.60	\$7,800	\$10,858.00	125.70	\$11,511	133.26	\$8,638
Employed 4th Qtr After Exit	100.00	114.94	87.00	100.00	108.11	82.10	88.76	92.50
Credential Attainment Rate	100.00	142.86	70.00	100.00	132.63	93.80	124.40	75.40
Measurable Skill Gains	100.00	138.89	72.00	100.00	129.37	92.30	119.40	77.30
Youth:								
Employed 2nd Qtr After Exit	76.90	96.13	80.00	74.80	92.12	66.90	82.39	81.20
Median Wage 2nd Quarter After Exit	\$3,349	98.50	\$3,400	\$3,050.00	93.53	\$3,453	105.89	\$3,261
Employed 4th Qtr After Exit	82.20	105.38	78.00	82.40	104.57	67.80	86.04	78.80
Credential Attainment Rate	100.00	108.70	92.00	100.00	113.38	100.00	113.38	88.20
Measurable Skill Gains	96.60	132.33	73.00	92.90	114.69	86.00	106.17	81.00
Wagner Peyser:								
Employed 2nd Qtr After Exit	65.00	95.59	68.00	63.00	96.48	61.90	94.79	65.30
Median Wage 2nd Quarter After Exit	\$6,936	136.00	\$5,100	\$6,686.00	120.69	\$6,734.00	121.55	\$5,540
Employed 4th Qtr After Exit	64.20	93.04	69.00	68.60	109.58	65.20	104.15	62.60
Not Met (less than 90% of negotiated)								
Met (90-100% of negotiated)								
Exceeded (greater than 100% of negotiated)								

AGENDA ITEM SUMMARY

Title	Local Workforce Development Area Designation - CSF Policy 94
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA) Pub L. 113-128, Section 106, 107 and 116/CareerSource Florida Administrative Policy 94
Action Requested	Review and Approve Application for Subsequent Local Workforce Development Area (LWDA) Designation
Background	<p>Under WIOA, the Governor must designate local workforce development areas after consultation with the State Workforce Board, CareerSource Florida, Chief Local Elected Officials (CLEO), and the Local Workforce Development Boards.</p> <p>LWDAs that received an initial designation shall be granted a subsequent designation if, for the two most recent program years, the LWDA performed successfully and sustained financial integrity.</p> <p>The process for an LWDA to submit a subsequent designation requires initial approval by the CLEOs.</p>
Staff Recommendations	Approval of CSRC Application for Subsequent LWDA Designation for Program Years 2023 & 2024
Supporting Material	CSF Policy 94 & Application for Subsequent LWDA Designation
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com 866-482-4473 ext. 418

APPLICATION FOR SUBSEQUENT LOCAL WORKFORCE DEVELOPMENT AREA DESIGNATION

LOCAL WORKFORCE AREA INFORMATION

NAME OF LOCAL AREA: Workforce Development Board of the Treasure Coast /dba CareerSource Research Coast

LWDB NUMBER: 20

DATE OF SUBMISSION: April 21, 2023

CONTACT PERSON NAME: Brian Bauer	PHONE: 772-482-4473 ext 418
	EMAIL ADDRESS: bbauer@careersourcerc.com

PERFORMED SUCCESSFULLY

THE TERM “PERFORMED SUCCESSFULLY” MEANS THE LOCAL WORKFORCE DEVELOPMENT AREA MET OR EXCEEDED THE ADJUSTED LEVELS OF PERFORMANCE FOR PRIMARY INDICATORS OF PERFORMANCE FOR THE LAST TWO CONSECUTIVE YEARS FOR WHICH DATA ARE AVAILABLE, AND THE LOCAL AREA HAS NOT FAILED THE SAME INDIVIDUAL MEASURE FOR THE LAST TWO CONSECUTIVE PROGRAM YEARS.

SUSTAINED FISCAL INTEGRITY

THE TERM “SUSTAINED FISCAL INTEGRITY” MEANS THAT THE SECRETARY OF LABOR HAS NOT MADE A FORMAL DETERMINATION, DURING EITHER OF THE LAST TWO CONSECUTIVE YEARS PRECEDING THE DETERMINATION REGARDING SUCH INTEGRITY, THAT EITHER THE GRANT RECIPIENT OR THE ADMINISTRATIVE ENTITY OF THE AREA HAS MISEXPENDED FUNDS PROVIDED.

BY SIGNING BELOW, THE LOCAL CHIEF ELECTED OFFICIAL AND THE LOCAL WORKFORCE BOARD EXECUTIVE DIRECTOR CERTIFY THAT THE LOCAL AREA HAS PERFORMED SUCCESSFULLY AND SUSTAINED FISCAL INTEGRITY FOR SUBSEQUENT DESIGNATION OF THE EXISTING LOCAL AREA.

LOCAL WORKFORCE BOARD EXECUTIVE DIRECTOR

NAME: Brian Bauer, President/CEO

SIGNATURE:

DATE:

LOCAL CHIEF ELECTED OFFICIAL	
NAME AND TITLE: Commissioner Chris Dzadoovsky, Chair Treasure Coast Workforce Consortium	COUNTY: St. Lucie County
SIGNATURE:	DATE:

LOCAL CHIEF ELECTED OFFICIAL	
NAME AND TITLE:	COUNTY:
SIGNATURE:	DATE:

LOCAL CHIEF ELECTED OFFICIAL	
NAME AND TITLE:	COUNTY:
SIGNATURE:	DATE:

LOCAL CHIEF ELECTED OFFICIAL	
NAME AND TITLE:	COUNTY:
SIGNATURE:	DATE:

LOCAL CHIEF ELECTED OFFICIAL	
NAME AND TITLE:	COUNTY:
SIGNATURE:	DATE:

LOCAL CHIEF ELECTED OFFICIAL	
NAME AND TITLE:	COUNTY:
SIGNATURE:	DATE:



MEMORANDUM

DATE: March 31, 2023

TO: Local Workforce Development Board Executive Directors

FROM: Kathryn Nelson, Chief, Bureau of One-Stop and Program Support *Kathryn Nelson*

SUBJECT: Local Workforce Development Area Designation and Local Workforce Development Board Composition and Certification

The purpose of this memorandum is to inform Local Workforce Development Boards (LWDBs) of the upcoming due date to submit applications for subsequent Local Workforce Development Area (LWDA) designation and LWDB composition rosters. As required under section 106 of the Workforce Innovation and Opportunity Act (WIOA), the CareerSource Florida Board of Directors (“state board”) will grant subsequent designation to a LWDA if, for the two most recent program years, the LWDA performed successfully and sustained fiscal integrity. Additionally, the state board must certify each LWDB as required under section 107, WIOA.

The authority section in the table below provides details on the requirements for each of these actions. Applications for subsequent LWDA designation and LWDB composition rosters are due on or before close of business **April 21, 2023**. Submit the completed documents as instructed below.

Action	Authority	Submit to
Complete the Application for Subsequent Local Workforce Development Area Designation	<ul style="list-style-type: none"> Section 106(b)(3), WIOA Administrative Policy 94 	LWDBGovernance@DEO.MyFlorida.com
Complete the Local Board Composition Roster	<ul style="list-style-type: none"> Sections 107(b)(2) and (c)(2), WIOA Administrative Policy 91 	

In February 2023, the state board approved a plan for system-wide transformation of Florida’s workforce system. This plan included realignment and consolidation of Florida’s current LWDA’s from 24 to 21 and the authority to pursue system-wide improvements and planning regions (prescribed in sections 106(a)(2)(B) and (C), WIOA). Accordingly, during the upcoming meeting in June 2023, the state board is expected to approve the designation of the current 24 LWDA’s and certify the current LWDBs for a period of one year from July 1, 2023 through June 30, 2024.

Florida Department of Economic Opportunity | Caldwell Building | 107 E. Madison Street | Tallahassee, FL 32399
(850) 245.7105 | www.FloridaJobs.org | www.Twitter.com/FLDEO | www.Facebook.com/FLDEO

A subsequent application for LWDA redesignation and required documents for LWDB certification will be requested again next year at which point the state board is expected to consider approvals for the typical two-year cycle. This new cadence of LWDA redesignations and LWDB certifications will align with the cycle for submission of the state's WIOA four-year plan.

The complete action item of the state board may be viewed [here](#).

KN/ta

Attachments: [LWDB Composition Roster](#)
[Application for Subsequent Local Workforce Development Area Designation](#)

cc: Dan McGrew
Keantha B. Moore
Dee Robinson
Isabelle Potts
Shawn Brown
Christa Nelson

AGENDA ITEM SUMMARY

Title	RFP/RFQ Composite Rating Sheet - Award of Contract for Audit Services
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/CareerSource Florida Administrative Policy 083
Action Requested	None. Information Only
Background	<p>The current Audit Services contract was for one year for the program year ending 6/30/2022. Contracts are awarded for a period of five (5) years renewable annually depending upon performance.</p> <p>In February of 2023, CareerSource Research Coast released a Request for Quote to accept quotes from vendors for the program years starting 7/01/2022 through 6/30/2027.</p> <p>CSRC received four (4) proposals. Only three (3) of these proposals passed technical review. A rating team consisting of the Director of Programs, Chief Financial Officer, and the Finance Accountant.</p> <p>Based on the cumulative rating score of the team, James Moore has been selected.</p>
Staff Recommendations	None. Information Only
Supporting Material	Composite Rating Sheet for RFP/RFQ #23-001-AS
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>



RFP/RFQ COMPOSITE RATING SHEET

RFP/RFQ Title: Audit Services

RFP/RFQ Number: 23-001-AS

Rating Team Captain: Lisa Delligatti

Rating Team Members: 1. Lisa Delligatti
 3. Shelly Batton
 5. _____

2. Regina Bass
 4. _____

Rated Elements		Proposers						Comments
		JM&Co	MKA	THF				
1	Qualification (60 Points Max)	60.0	60.0	50.0				JMCo has more experience in auditing workforce boards than the other vendors. All vendors had qualified staff.
2	Understanding (60 Points Max)	60.0	45.0	40.0				Based on the number of CareerSource boards that JMCo provide audit services for, they possess a better understanding of the time and effort required, as board accounting is not standardized.
3	Cost (60 Points Max)	25.0	60.0	40.0				While JMCo was the highest rated cost. They were only \$2,900 more than the second rated vendor and in year 5 were no longer the highest cost. The lowest cost proposer did not set a fixed cost for years 2-5. To be negotiated.
4	Experience (60 Points Max)	60.0	30.0	30.0				Based on the number of prior audits for the CareerSource system, JMCo has the most experience.
5	Capacity (60 Points Max)	60.0	40.0	45.0				JMCo and THF are larger firms with staff capacity to complete the audits, while MKA is a smaller firm with little workforce audit experience. Capacity is probably sufficient but not as high as other vendors.
6	(__ Points Max)							
TOTAL POINTS (300 POINTS MAX)		265.0	235.0	205.0	0.0	0.0	0.0	

Rating Team Captain Signature: Lisa Delligatti

Digitally signed by Lisa Delligatti
 Date: 2023.03.27 10:55:27 -04'00'

Date: 3/27/23

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TTD equipment via the Florida Relay Service at 711.
 RFP RFQ Composite Sheet - April 2020



March 8, 2023

CareerSource Research Coast
Executive Committee
574 NW University Blvd, Suite 100
Port St. Lucie, FL 34986

Re: Termination of Agreement – Right of Termination Appeal

Dear Executive Committee,

QPI Healthcare Services, LLC. engaged in an Employer On-The-Job Training (OJT) Agreement with your company commencing July 1, 2022, with an expiration date of June 30, 2023. See included agreement, page 2, V.3.

In accordance with Section 18. Right of Termination, paragraph 2; If Employer disagrees with the reason of termination, they may file a grievance in writing within then (10) days of notice.

I am in receipt via USPS Certified Mail, dated Monday, March 7, 2023, of your “Notice of Termination” of the agreement for:

9. Acceptable documents required by finance are:

a. Completed and signed OJT Progress Report/Reimbursement Invoice showing rate of pay, number of hours worked, withheld taxes and trainee’s progress during the training.

b. System-generated payroll register or a copy of the pay stub showing pay period, hours paid, gross wages, deductions, and net pay. If the employer does not utilize a payroll system and issues manual checks, a copy of the canceled check (front and back) must be provided. In this situation, the employer must also provide a statement that indicates the employee was paid at the contracted rate per the OJT Training Agreement, paid the corrects number of hours, and that all appropriate taxes were withheld.

I strongly oppose your decision to “Terminate” and have provided sufficient evidence to refute this decision.

Please review the following facts:

- Jamie Bradley, started her employment with QPI Healthcare Services, LLC. on October 31, 2022 – see “Offer of Employment” dated October 31, 2022.
- Jamie Bradley Quickbooks Payroll Report – Payroll Period – Week Of – 10/27/2022 – 11/02/2022 – Pay Date of 11/10/2022.
- Please find enclosed Jamie Bradley’s Personnel File to include:
 - Detailed Payroll Report – 10/01/2022 – 03/03/2023
 - Offer of Employment Letter – 10/31/2022
 - Employee Application
 - Receipt of Employee Handbook
 - W4
 - I9
 - Consents, Authorizations, Releases, and Declarations
 - Office of the Inspector General Required Training
 - Driver’s License

403 N US Hwy 1 – Fort Pierce, FL 34950
375 E. Central Ave, Second Floor, Ste 377 – Winter Haven, FL 33880
772-828-2303
www.qpihcs.org

- Christian Luyanda, A., started his employment with QPI Healthcare Services, LLC. on December 12, 2022 – see “Offer of Employment” dated December 12, 2022.
- Christian Luyanda, A. Quickbooks Payroll Report – Payroll Period – Week Of – 12/08/2022 – 12/14/2022 – Pay Date of 12/23/2022.
- Please find enclosed Christian Luyanda, A. Personnel File to include:

<ul style="list-style-type: none"> ○ Detailed Payroll Report – 10/01/2022 – 03/03/2023 ○ Offer of Employment Letter – 12/12/2022 ○ Employee Application ○ Receipt of Employee Handbook ○ W4 		<ul style="list-style-type: none"> ○ I9 ○ Consents, Authorizations, Releases, and Declinations ○ Office of the Inspector General Required Training ○ Driver's License
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- Pierre “Leo” de Vastey, started his employment with QPI Healthcare Services, LLC. on February 2, 2023 – see “Offer of Employment” dated February 2, 2023.
- Pierre “Leo” de Vastey Quickbooks Payroll Report – Payroll Period – Week Of – 02/11/2023 – 02/11/2023 – Pay Date of 02/11/2023. This payroll date was a push by me to pay Leo for the week prior. I was out of town and simply missed his schedule payroll date of 02/10/2022.
- Please find enclosed Pierre “Leo” de Vastey Personnel File to include:

<ul style="list-style-type: none"> ○ Detailed Payroll Report – 10/01/2022 – 03/03/2023 ○ Offer of Employment Letter – 12/12/2022 ○ Resume ○ Employee Application ○ Receipt of Employee Handbook 		<ul style="list-style-type: none"> ○ W4 ○ I9 ○ Consents, Authorizations, Releases, and Declinations ○ Office of the Inspector General Required Training ○ Driver's License
--	--	---
- Snapshot of Quickbooks Pay Schedule
- Multiple email requests to manipulate QPI Healthcare Services, LLC., Quickbooks generated Payroll Reports.
 - See included email communications.

Executive Committee, I simply do not understand is why this engagement became so convoluted. My designated staff member was advised on multiple occasions by your company to alter the “Payroll Report/Dates.”

Our pay period runs from Thursday to Wednesday with a Pay Date of Friday, the following week. This is not a difficult concept and your team is/was adamant in demanding our records be altered to reflect a “Monday thru Friday work week.”

I look forward to your decision.

Kind regards,


Pam Seymour
CEO

Cc: Simon Gaugush, PA – Carlton Fields

403 N US Hwy 1 – Fort Pierce, FL 34950
375 E. Central Ave, Second Floor, Ste 377 – Winter Haven, FL 33880
772-828-2303
www.qpihcs.org

Board of Directors Potential Candidates

1. Kate Sterling, COO - referred by Larry Hawes
Freshco & Indian River Select, LLC
ksterling@freshcoltd.com
772-342-2462
2. Kevin Staten, VP - Referred by Tammy Matthew, VP, Bank of America
Bank of America
kevin.staten@bofa.com
772-600-2448
3. Kelly Johnson - referred by Jim Brann
RV Johnson Insurance
kjohnson@rvjohnson.com
772-287-3366
4. Will Armstead, CEO
Boys & Girls Clubs of Port St. Lucie
warmtead@bgcofslc.org
772-577-8630
5. Chamber of Commerce Seat
 - Dori Stone, President/CEO, Indian River County Chamber - doris@indianriverchamber.com
 - Terissa Aronson, President/CEO, St. Lucie County Chamber - president@stluciechamber.org
 - Joe Catrambone, President/CEO, Stuart/Martin County Chamber - jcat@stuartmartinchamber.org
6. Justine Beard - referred by Jim Brann
Marine Industry Association
jbeard@miatc.org
7. Tom Kindred - referred by Jim Brann
Regional Director Florida Small Business Development Center
Indian River State College
tkindred@irsc.edu