



Executive Committee Meeting

MEETING AGENDA

Meeting Details

Date: Friday, October 13, 2023

Time: 8:00 a.m.

Location: Administrative Office
584 NW University Blvd.
Suite 100
Port St. Lucie, FL 3498

MS Teams ***Virtual Meeting Access:***

Access Code: 107 066 757#

Phone: 772-800-5467

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

Opening Remarks

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

Voting Items

3. Consent Agenda
 - a. Review and Approve Supplemental Nutrition Assistance Program (SNAP) - Requirements Policy Revisions
4. Review and Approve Financial Reports for July and August 2023
5. Review and Approve Local Targeted Occupations List (LTOL) for 2nd Quarter of PY 2023-2024
6. Review and Approve Internal Control Questionnaire (ICQ) - PY 2023-2024
7. Review and Approve Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs - July 1, 2023- June 30, 2024
8. Other Business
 - a. St. Lucie County Comprehensive Center Discussion
 - b. Organizational Chart Direct Services Model - PY 2023-2024
 - c. CareerSource Research Coast (CRSC) Succession Plan Update
 - d. CareerSource Florida Board of Directors
 - i. Strategic Policy - Regional Planning Areas
 - ii. Strategic Policy - Education and Industry Consortia
 - iii. Administrative Policy - Eligible Training Provider List
9. Adjournment

The next Executive Meeting will be on November 17, 2023

collaborate.
innovate.
lead.

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 3

AGENDA ITEM SUMMARY

Title	Consent Agenda
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Board By-Laws
Action Requested	Approve Consent Agenda as Presented
Background	Consent Agenda a. Review and Approve Supplemental Nutrition Assistance Program (SNAP) - Requirements Policy Revisions
Staff Recommendation	Review and Approve Consent Agenda Items as presented
Supporting Material	Supplemental Nutrition Assistance Program (SNAP) Requirements Policy Revisions
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

Agenda Item 3a

AGENDA ITEM SUMMARY

Title	Review and Approve Supplemental Nutrition Assistance Program (SNAP) - Requirements Policy Revisions
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Person Responsibility and Work Opportunity Reconciliation Act of 1996 and the SNAP Employment and Training (E&T) Florida State Plan
Action Requested	Review and Approve Revisions to the SNAP Program - Requirements Policy
Background	<p>SNAP E&T Program is a mandatory program designed to assist Able-Bodied Adults Without Dependents (ABAWDs) gain skills, training, or work experience to increase their ability to move directly into employment.</p> <p>The Fiscal Responsibility Act of 2023 expanded the age requirement of ABAWDs subject to mandatory work requirements. The local policy was updated to reflect the extension of the maximum age requirement from age 49 to age 59.</p>
Staff Recommendations	Review and Approve the Supplemental Nutrition Assistance Program (SNAP) Requirements Policy Revisions
Supporting Material	Supplemental Nutrition Assistance (SNAP) Program Requirements Policy Revisions
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext.418



SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM PROGRAM REQUIREMENTS POLICY

ORIGINAL APPROVAL DATE: 3/9/2016

REVISION DATE:

~~07/01/2023~~09/27/2023

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. FLORIDACOMMERCE, 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~~59
- 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 FLORIDACOMMERCE 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.



SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM
PROGRAM REQUIREMENTS POLICY

ORIGINAL APPROVAL DATE: 3/9/2016

REVISION DATE:

~~07/01/2023~~09/27/2023

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. FLORIDACOMMERCE 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.



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. FLORIDACOMMERCE, 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 18-59
- 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 FLORIDACOMMERCE 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. FLORIDACOMMERCE 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 4

AGENDA ITEM SUMMARY

Title	July and August Financial Reports - PY 2023-2024
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 July and August Financial Reports - PY 2023-2024
Background	The Board approved the budget for PY 2023-2024. The Executive Committee regularly reviews budgets, all amendments to the budget, and monthly expenditures.
Staff Recommendations	Review and Approve July and August Financial Reports - PY 2023-2024
Supporting Material	July and August Financial Reports - PY 2023-2024
Board Staff	Lisa Delligatti CFO ldelligatti@careersourcerc.com (866) 482-4473 ext. 430

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

PY 23-24 TOTAL AVAILABLE FUNDING	INDIRECT	10 ADULT	12 DW	11 YOUTH	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	40 WTP	474 Rapid Response Navigator
PY 23-24 Allocations		\$ 1,020,696	\$ 768,878	\$ 890,940	\$ 812,239	\$ 405,841	\$ 126,167	\$ 166,108	\$ 453,000	\$ 995,764	\$ 75,000
PY 23-24 Supplemental		\$ -	\$ 164,384	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ (354,062)	\$ -	\$ (78,699)	\$ (91,213)	\$ -	\$ -	\$ -
Carryforward to PY 24-25		\$ -	\$ (919,443)	\$ (482,276)	\$ (114,544)	\$ (188,152)	\$ (37,396)	\$ (58,704)	\$ (63,694)	\$ (163,614)	\$ (42,940)
Carryforward from PY 22-23		\$ 286,364	\$ 869,768	\$ 568,110	\$ 81,565	\$ 130,534	\$ 20,463	\$ 24,529	\$ 122,540	\$ 146,600	\$ -
TOTAL	\$ -	\$ 1,307,060	\$ 883,587	\$ 976,774	\$ 425,197	\$ 348,223	\$ 30,535	\$ 40,720	\$ 511,846	\$ 978,750	\$ 32,060
FUNDING DRAWN DOWN YTD											
FUNDING DRAWN DOWN YTD	INDIRECT	10 ADULT	12 DW	11 YOUTH	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	40 WTP	474 Rapid Response Navigator
PY 23-24 Allocations		\$ 248,913	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
PY 23-24 Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 24-25		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 22-23		\$ -	\$ -	\$ 20,677	\$ 11,696	\$ 23,970	\$ 2,897	\$ 3,347	\$ 17,058	\$ 22,838	\$ -
TOTAL		\$ 248,913	\$ -	\$ 20,677	\$ 11,696	\$ 23,970	\$ 2,897	\$ 3,347	\$ 17,058	\$ 22,838	\$ -
% of Total Budgeted Funding Received		19.04%	0.00%	2.12%	2.75%	6.88%	9.49%	8.22%	3.33%	2.33%	0.00%
EXPENDITURES											
Administrative	\$ -	\$ 6,994	\$ 775	\$ 2,892	\$ 247	\$ 1,124	\$ 83	\$ 89	\$ 702	\$ 4,222	\$ -
Salaries and Benefits	\$ 13,867	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 8,184	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (22,050)	\$ 6,994	\$ 775	\$ 2,892	\$ 247	\$ 1,124	\$ 83	\$ 89	\$ 702	\$ 4,222	\$ -
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ 83,562	\$ 8,833	\$ 66,973	\$ 5,036	\$ 14,791	\$ 2,022	\$ 2,087	\$ 9,122	\$ 50,218	\$ -
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 55,609	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 8,516	\$ 29,665	\$ 1,830	\$ 843	\$ 894	\$ 7,198	\$ 287	\$ 287	\$ 5,409	\$ 14,760	\$ -
Contract Labor	\$ -	\$ 766	\$ 38	\$ -	\$ -	\$ 1,825	\$ -	\$ -	\$ 174	\$ 1,117	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 150	\$ -
Support Services ITA	\$ -	\$ 195	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ 28,137	\$ 4,823	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-OJT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ 109	\$ 5	\$ -	\$ -	\$ 36	\$ -	\$ -	\$ 25	\$ 60	\$ -
One Stop Shared Costs	\$ -	\$ 8,340	\$ 411	\$ -	\$ 2,714	\$ 2,780	\$ 1,357	\$ 1,357	\$ 1,895	\$ 4,550	\$ -
Other Operating Expenses	\$ 3,784	\$ 12,448	\$ 1,295	\$ 8,908	\$ 1,289	\$ 2,324	\$ 331	\$ 393	\$ 1,228	\$ 26,950	\$ -
Allocated Program Indirect	\$ (12,300)	\$ 3,902	\$ 432	\$ 1,613	\$ 138	\$ 627	\$ 46	\$ 50	\$ 392	\$ 2,355	\$ -
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expenditures	\$ 0	\$ 90,557	\$ 9,608	\$ 69,865	\$ 5,283	\$ 15,915	\$ 2,105	\$ 2,175	\$ 9,824	\$ 54,440	\$ -
Funding Over/(under) expenditures	\$ 0	\$ 158,356	\$ (9,608)	\$ (49,188)	\$ 6,413	\$ 8,055	\$ 792	\$ 1,172	\$ 7,234	\$ (31,602)	\$ -
YTD % of Budgeted Funds Expended		6.93%	1.09%	7.15%	1.24%	4.57%	6.89%	5.34%	1.92%	5.56%	0.00%

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

PY 23-24 TOTAL AVAILABLE FUNDING	475 FAWA	48 F.A.T.E.S.	95 Workforce Summit	792 Youth SOS SLC	Other Non NFA	YEAR TO DATE TOTALS			
PY 23-24 Allocations	\$ -	\$ -	\$ 140,000	\$ -	\$ -		\$ 5,854,633		
PY 23-24 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 164,384		
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ 60,046		\$ 60,046		
Additional Funds	\$ -	\$ -	\$ -	\$ 149,230	\$ -		\$ 149,230		
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -		\$ (523,974)		
Carryforward to PY 24-25	\$ (1,189,515)	\$ (97,043)	\$ -	\$ -	\$ -		\$ (3,357,321)		
Carryforward from PY 22-23	\$ 2,760,541	\$ -	\$ -	\$ -	\$ -		\$ 5,011,013		
TOTAL	\$ 1,571,026	\$ (97,043)	\$ 140,000	\$ 149,230	\$ 60,046	\$ -	\$ 7,358,011		
FUNDING DRAWN DOWN YTD									
	475 FAWA	48 F.A.T.E.S.	95 Workforce Summit	792 Youth SOS SLC	Other Non NFA	PY 23-24 Actual	PY 23-24 Budget	VARIANCE	% Expended
PY 23-24 Allocations	\$ -	\$ -	\$ 13,518	\$ -	\$ -	\$ 262,431	\$ 5,854,633	\$ 5,592,202	4.482%
PY 23-24 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 164,384	\$ 164,384	0.000%
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ 563	\$ 563	\$ 60,046	\$ 59,484	0.937%
Additional Funds	\$ -	\$ 156,308	\$ -	\$ 88,126	\$ -	\$ 244,434	\$ 149,230	\$ (95,204)	163.797%
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (523,974)	\$ (523,974)	
Carryforward to PY 24-25	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (3,357,321)	\$ (3,357,321)	
Carryforward from PY 22-23	\$ 16,741	\$ -	\$ -	\$ -	\$ -	\$ 119,224	\$ 5,011,013	\$ 4,891,789	2.379%
TOTAL	\$ 16,741	\$ 156,308	\$ 13,518	\$ 88,126	\$ 563	\$ 626,652	\$ 7,358,011	\$ 6,731,359	8.517%
% of Total Budgeted Funding Received	1.07%	-161.07%	0.00%	59.05%	0.94%	8.52%			
EXPENDITURES									
						PY 23-24 Actual	PY 23-24 Budget	VARIANCE	% Expended
Administrative	\$ 948	\$ 29	\$ 1,333	\$ 2,552	\$ 61	\$ 22,050	\$ 601,836	\$ 579,786	3.66%
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 13,867	\$ 515,350	\$ 501,484	2.69%
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,184	\$ 86,486	\$ 78,302	9.46%
Allocated Indirect Costs	\$ 948	\$ 29	\$ 1,333	\$ 2,552	\$ 61	\$ 0	\$ (0)	\$ (0)	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Program Training	\$ 11,500	\$ 339	\$ 14,140	\$ 27,919	\$ 1,008	\$ 297,549	\$ 6,912,484	\$ 6,614,934	4.3%
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 55,609	\$ 800,000	\$ 744,391	7.0%
Salaries and Benefits	\$ 5,418	\$ 99	\$ -	\$ 1,526	\$ 495	\$ 77,228	\$ 3,178,288	\$ 3,101,060	2.4%
Contract Labor	\$ 174	\$ 3	\$ -	\$ -	\$ -	\$ 4,097	\$ 46,903	\$ 42,806	8.7%
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 275	\$ 17,126	\$ 16,851	1.6%
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 150	\$ 11,759	\$ 11,609	1.3%
Support Services ITA	\$ -	\$ 100	\$ -	\$ -	\$ -	\$ 295	\$ 161,500	\$ 161,205	0.2%
Training-ITA/OST/TAA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 32,960	\$ 650,415	\$ 617,454	5.1%
Training-OJT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 663,224	\$ 663,224	0.0%
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 78,000	\$ 78,000	0.0%
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ 23,958	\$ -	\$ 23,958	\$ 99,226	\$ 75,268	24.1%
Travel	\$ 25	\$ 0	\$ -	\$ -	\$ -	\$ 261	\$ 26,215	\$ 25,954	1.0%
One Stop Shared Costs	\$ 1,895	\$ 37	\$ -	\$ -	\$ 374	\$ 25,709	\$ 458,387	\$ 432,678	5.6%
Other Operating Expenses	\$ 3,459	\$ 83	\$ 13,397	\$ 1,012	\$ 106	\$ 77,006	\$ 721,440	\$ 644,434	10.7%
Allocated Program Indirect	\$ 529	\$ 16	\$ 743	\$ 1,424	\$ 34	\$ 0	\$ 0	\$ -	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Expenditures	\$ 12,447	\$ 369	\$ 15,472	\$ 30,472	\$ 1,069	\$ 319,600	\$ 7,514,320	\$ 7,194,720	4.3%
Funding Over/(under) expenditures	\$ 4,294	\$ 155,940	\$ (1,954)	\$ 57,654	\$ (506)	\$ 307,052			
YTD % of Budgeted Funds Expended	0.79%	-0.38%	0.00%	20.42%	1.78%	4.34%			

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

PY 23-24 TOTAL AVAILABLE FUNDING	INDIRECT	10 ADULT	12 DW	11 YOUTH	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	282 TAA	40 WTP
PY 23-24 Allocations		\$ 1,020,696	\$ 768,878	\$ 890,940	\$ 812,239	\$ 405,841	\$ 126,167	\$ 166,108	\$ 398,384	\$ -	\$ 995,764
PY 23-24 Supplemental		\$ -	\$ 164,384	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ (354,062)	\$ -	\$ (78,699)	\$ (91,213)	\$ -	\$ -	\$ -
Carryforward to PY 24-25		\$ -	\$ (919,443)	\$ (482,276)	\$ (114,544)	\$ (188,152)	\$ (37,396)	\$ (58,704)	\$ (63,694)	\$ -	\$ (163,614)
Carryforward from PY 22-23		\$ 286,364	\$ 869,768	\$ 568,110	\$ 81,565	\$ 130,534	\$ 20,463	\$ 24,529	\$ 122,540	\$ -	\$ 146,600
TOTAL	\$ -	\$ 1,307,060	\$ 883,587	\$ 976,774	\$ 425,197	\$ 348,223	\$ 30,535	\$ 40,720	\$ 457,230	\$ -	\$ 978,750
FUNDING DRAWN DOWN YTD											
	INDIRECT	10 ADULT	12 DW	11 YOUTH	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	282 TAA	40 WTP
PY 23-24 Allocations		\$ 353,364	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
PY 23-24 Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 24-25		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 22-23		\$ -	\$ 42,600	\$ 108,277	\$ 48,196	\$ 57,470	\$ 6,847	\$ 5,747	\$ 40,658	\$ -	\$ 124,448
TOTAL		\$ 353,364	\$ 42,600	\$ 108,277	\$ 48,196	\$ 57,470	\$ 6,847	\$ 5,747	\$ 40,658	\$ -	\$ 124,448
% of Total Budgeted Funding Received		27.04%	4.82%	11.09%	11.33%	16.50%	22.42%	14.11%	8.89%	#DIV/0!	12.71%
EXPENDITURES											
Administrative	\$ -	\$ 20,512	\$ 3,350	\$ 4,727	\$ 5,437	\$ 3,130	\$ 363	\$ 316	\$ 3,356	\$ -	\$ 9,544
Salaries and Benefits	\$ 45,611	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 18,072	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (63,683)	\$ 24,643	\$ 3,350	\$ 4,727	\$ 1,306	\$ 3,130	\$ 363	\$ 316	\$ 3,356	\$ -	\$ 9,544
Reclassification	\$ -	\$ (4,131)	\$ -	\$ -	\$ 4,131	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ 189,470	\$ 29,540	\$ 139,226	\$ 50,751	\$ 29,850	\$ 5,115	\$ 4,722	\$ 31,100	\$ -	\$ 87,061
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 115,005	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 32,434	\$ 107,858	\$ 12,964	\$ 2,530	\$ 3,353	\$ 16,188	\$ 886	\$ 886	\$ 20,811	\$ -	\$ 37,265
Contract Labor	\$ -	\$ 2,718	\$ 318	\$ -	\$ 6	\$ 3,262	\$ 3	\$ 3	\$ 611	\$ -	\$ 2,855
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 375
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,596
Support Services ITA	\$ -	\$ 905	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ 37,784	\$ 9,646	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-OJT	\$ -	\$ 12,592	\$ 899	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 847	\$ 1,142	\$ 286	\$ 616	\$ 418	\$ 438	\$ 424	\$ 1	\$ 222	\$ -	\$ 597
One Stop Shared Costs	\$ -	\$ 20,087	\$ 411	\$ -	\$ 6,287	\$ 3,908	\$ 3,143	\$ 3,143	\$ 4,527	\$ -	\$ 7,490
Other Operating Expenses	\$ 8,675	\$ 22,518	\$ 2,809	\$ 17,961	\$ 7,459	\$ 3,992	\$ 419	\$ 481	\$ 2,717	\$ -	\$ 30,596
Allocated Program Indirect	\$ (41,956)	\$ 16,235	\$ 2,207	\$ 3,114	\$ 860	\$ 2,062	\$ 239	\$ 208	\$ 2,211	\$ -	\$ 6,287
Reclassification	\$ -	\$ (32,369)	\$ -	\$ -	\$ 32,369	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expenditures	\$ 0	\$ 209,982	\$ 32,890	\$ 143,952	\$ 56,187	\$ 32,980	\$ 5,478	\$ 5,038	\$ 34,456	\$ -	\$ 96,605
Funding Over/(under) expenditures	\$ 0	\$ 143,382	\$ 9,710	\$ (35,676)	\$ (7,991)	\$ 24,491	\$ 1,369	\$ 709	\$ 6,202	\$ -	\$ 27,843
YTD % of Budgeted Funds Expended		16.07%	3.72%	14.74%	13.21%	9.47%	17.94%	12.37%	7.54%	#DIV/0!	9.87%

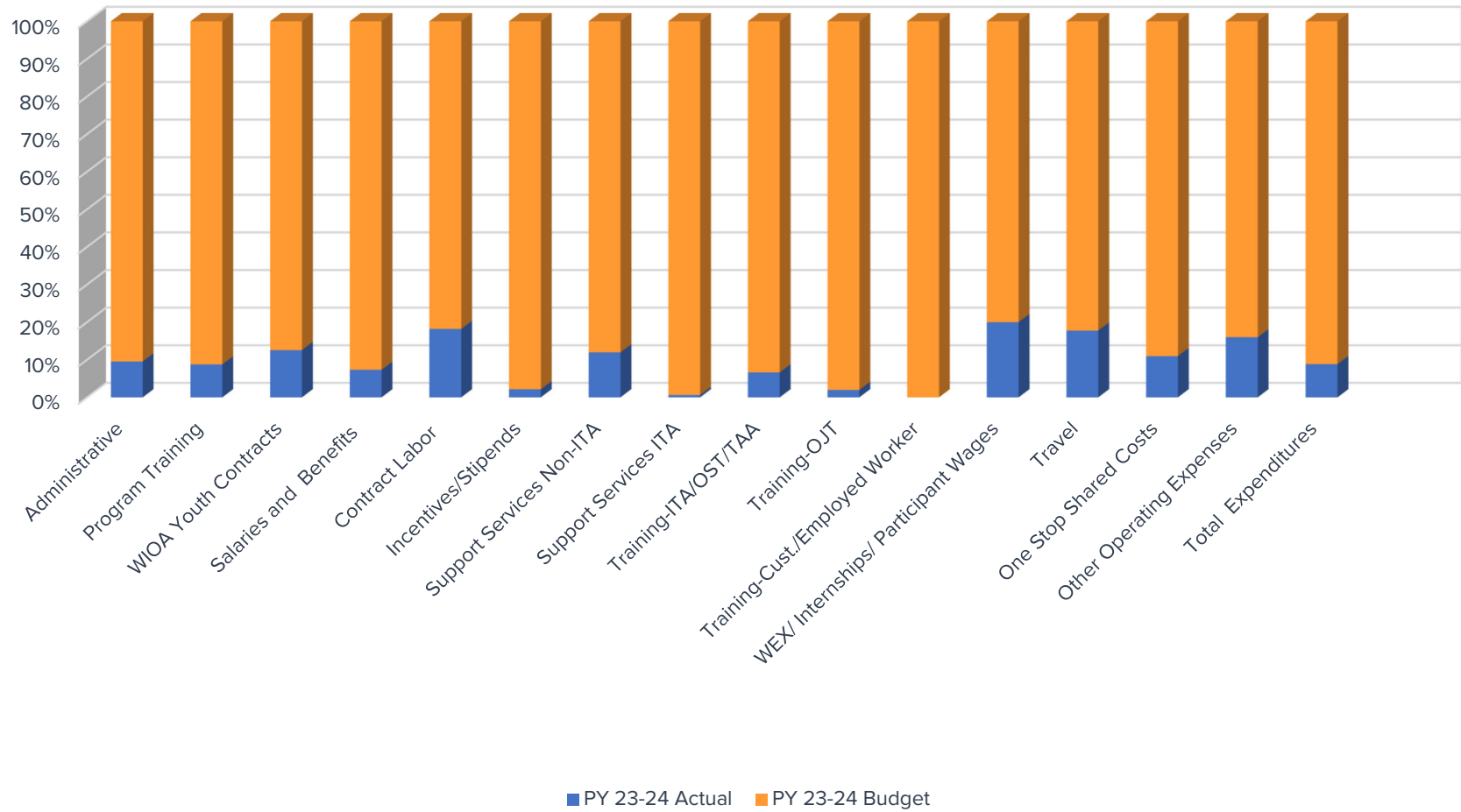
LWDB 20
Summary of Funding and Expenditures
As of August 31, 2023

PY 23-24 TOTAL AVAILABLE FUNDING	470 Apprent Navigator	474 Rapid Response Navigator	475 FAWA	476 Hope Navigator	477 Hope Training	48 F.A.T.E.S.	95 Workforce Summit	792 Youth SOS SLC	801 VMA	Other Non NFA
PY 23-24 Allocations	\$ 62,499	\$ 75,000	\$ -	\$ 73,283	\$ 104,686	\$ -	\$ 140,000	\$ -	\$ 12,024	\$ -
PY 23-24 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 60,046
Additional Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 149,230	\$ -	\$ -
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 24-25	\$ -	\$ (42,940)	\$ (1,189,515)	\$ -	\$ -	\$ (97,043)	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 22-23	\$ -	\$ -	\$ 2,760,541	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ 62,499	\$ 32,060	\$ 1,571,026	\$ 73,283	\$ 104,686	\$ (97,043)	\$ 140,000	\$ 149,230	\$ 12,024	\$ 60,046
FUNDING DRAWN DOWN YTD										
	470 Apprent Navigator	474 Rapid Response Navigator	475 FAWA	476 Hope Navigator	477 Hope Training	48 F.A.T.E.S.	95 Workforce Summit	792 Youth SOS SLC	801 VMA	Other Non NFA
PY 23-24 Allocations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 23,518	\$ -	\$ 5,010	\$ -
PY 23-24 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,819
Additional Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 156,308	\$ -	\$ 88,126	\$ -	\$ -
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 24-25	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 22-23	\$ -	\$ -	\$ 67,351	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ -	\$ -	\$ 67,351	\$ -	\$ -	\$ 156,308	\$ 23,518	\$ 88,126	\$ 5,010	\$ 2,819
% of Total Budgeted Funding Received	0.00%	0.00%	4.29%	0.00%	0.00%	-161.07%	0.00%	59.05%	41.67%	4.70%
EXPENDITURES										
Administrative	\$ 43	\$ 279	\$ 6,210	\$ -	\$ -	\$ 86	\$ 1,758	\$ 3,931	\$ -	\$ 643
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ 43	\$ 279	\$ 6,210	\$ -	\$ -	\$ 86	\$ 1,758	\$ 3,931	\$ -	\$ 643
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ 357	\$ 2,520	\$ 54,236	\$ -	\$ -	\$ 765	\$ 14,555	\$ 33,578	\$ 5,010	\$ 6,160
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ -	\$ 2,016	\$ 20,451	\$ -	\$ -	\$ 346	\$ -	\$ 3,223	\$ -	\$ 2,049
Contract Labor	\$ -	\$ 9	\$ 628	\$ -	\$ -	\$ 9	\$ -	\$ -	\$ -	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 100	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-OJT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 24,790	\$ -	\$ -
Travel	\$ 154	\$ 4	\$ 419	\$ -	\$ -	\$ 3	\$ -	\$ -	\$ -	\$ 88
One Stop Shared Costs	\$ -	\$ 51	\$ 4,630	\$ -	\$ -	\$ 72	\$ -	\$ 1,689	\$ -	\$ 1,032
Other Operating Expenses	\$ 175	\$ 256	\$ 24,018	\$ -	\$ -	\$ 179	\$ 13,397	\$ 1,286	\$ 5,010	\$ 2,567
Allocated Program Indirect	\$ 28	\$ 184	\$ 4,091	\$ -	\$ -	\$ 56	\$ 1,158	\$ 2,590	\$ -	\$ 424
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expenditures	\$ 401	\$ 2,798	\$ 60,446	\$ -	\$ -	\$ 851	\$ 16,313	\$ 37,509	\$ 5,010	\$ 6,803
Funding Over/(under) expenditures	\$ (401)	\$ (2,798)	\$ 6,905	\$ -	\$ -	\$ 155,457	\$ 7,205	\$ 50,617	\$ -	\$ (3,984)
YTD % of Budgeted Funds Expended	0.00%	8.73%	3.85%	0.00%	0.00%	-0.88%	0.00%	25.14%	41.67%	11.33%

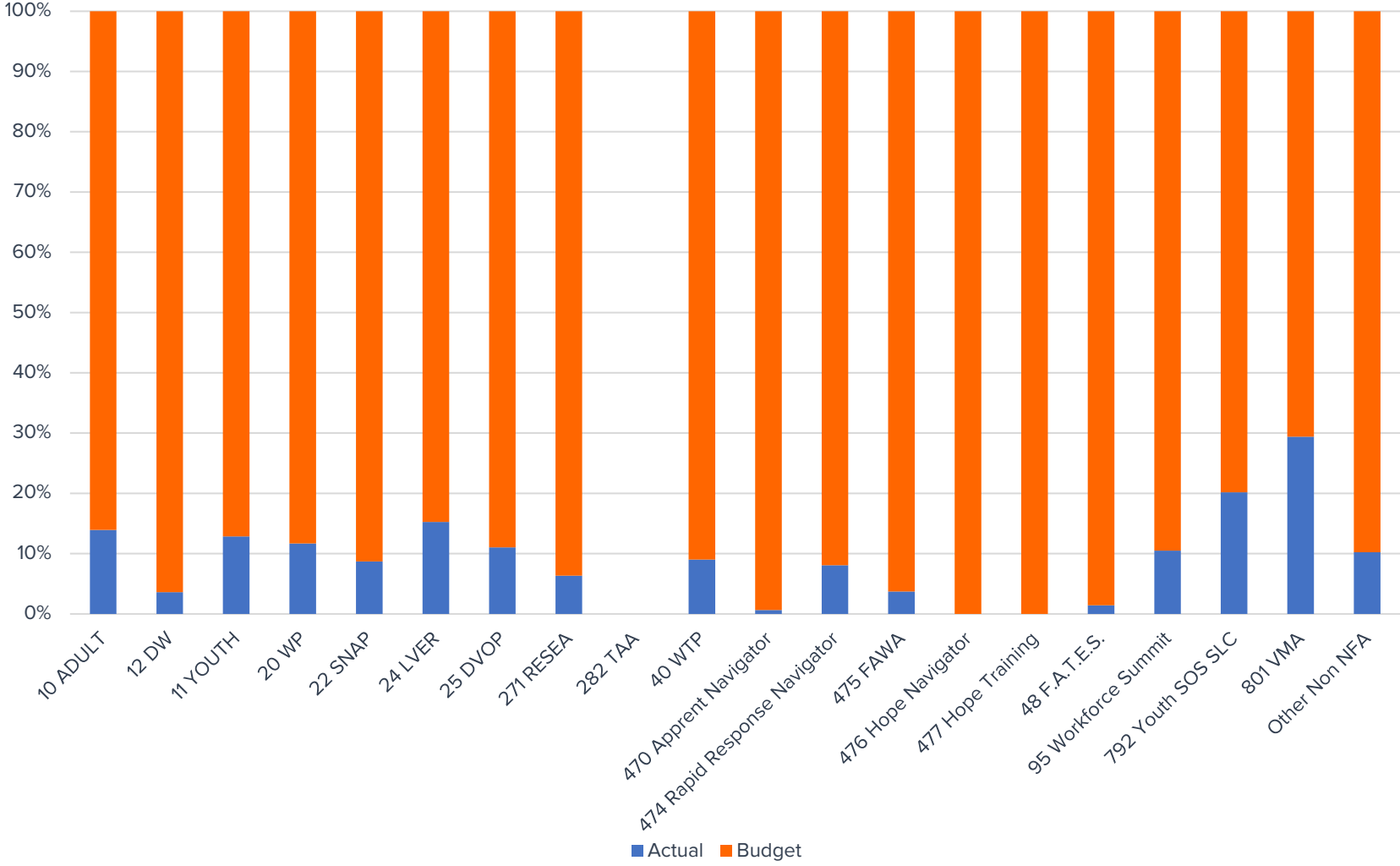
LWDB 20
Summary of Funding and Expenditures
As of August 31, 2023

PY 23-24 TOTAL AVAILABLE FUNDING	YEAR TO DATE TOTALS			
PY 23-24 Allocations		\$	6,125,791	
PY 23-24 Supplemental		\$	164,384	
Unrestricted Funds Earned this year		\$	60,046	
Additional Funds		\$	149,230	
Retained by DEO for Merit Salaries		\$	(523,974)	
Carryforward to PY 24-25		\$	(3,357,321)	
Carryforward from PY 22-23		\$	5,011,013	
TOTAL		\$	7,629,169	
FUNDING DRAWN DOWN YTD				
	PY 23-24 Actual	PY 23-24 Budget	VARIANCE	% Expended
PY 23-24 Allocations	\$ 381,892	\$ 6,125,791	\$ 5,743,899	6.234%
PY 23-24 Supplemental	\$ -	\$ 164,384	\$ 164,384	0.000%
Unrestricted Funds Earned this year	\$ 2,819	\$ 60,046	\$ 57,227	4.695%
Additional Funds	\$ 244,434	\$ 149,230	\$ (95,204)	163.797%
Retained by DEO for Merit Salaries	\$ -	\$ (523,974)	\$ (523,974)	
Carryforward to PY 24-25	\$ -	\$ (3,357,321)	\$ (3,357,321)	
Carryforward from PY 22-23	\$ 501,594	\$ 5,011,013	\$ 4,509,419	10.010%
TOTAL	\$ 1,130,740	\$ 7,629,169	\$ 6,498,429	14.821%
% of Total Budgeted Funding Received	14.82%			
EXPENDITURES				
	PY 23-24 Actual	PY 23-24 Budget	VARIANCE	% Expended
Administrative	\$ 63,683	\$ 603,121	\$ 539,437	10.56%
Salaries and Benefits	\$ 45,611	\$ 515,350	\$ 469,739	8.85%
General and Administrative	\$ 18,072	\$ 86,486	\$ 68,414	20.90%
Allocated Indirect Costs	\$ (0)	\$ 1,284	\$ 1,284	
Reclassification	\$ -	\$ -	\$ -	
Travel	\$ -	\$ -	\$ -	
Program Training	\$ 684,016	\$ 7,132,425	\$ 6,448,409	9.6%
WIOA Youth Contracts	\$ 115,005	\$ 800,000	\$ 684,995	14.4%
Salaries and Benefits	\$ 263,260	\$ 3,334,621	\$ 3,071,361	7.9%
Contract Labor	\$ 10,421	\$ 46,903	\$ 36,482	22.2%
Internship	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ 375	\$ 17,126	\$ 16,751	2.2%
Support Services Non-ITA	\$ 1,596	\$ 11,759	\$ 10,163	13.6%
Support Services ITA	\$ 1,005	\$ 161,500	\$ 160,495	0.6%
Training-ITA/OST/TAA	\$ 47,430	\$ 668,415	\$ 620,985	7.1%
Training-OJT	\$ 13,491	\$ 670,424	\$ 656,933	2.0%
Training-Cust./Employed Worker	\$ -	\$ 78,000	\$ 78,000	0.0%
WEX/ Internships/ Participant Wages	\$ 24,790	\$ 99,226	\$ 74,436	25.0%
Travel	\$ 5,659	\$ 26,215	\$ 20,556	21.6%
One Stop Shared Costs	\$ 56,470	\$ 458,387	\$ 401,918	12.3%
Other Operating Expenses	\$ 144,515	\$ 760,393	\$ 615,879	19.0%
Allocated Program Indirect	\$ 0	\$ (544)	\$ -	
Reclassification	\$ -	\$ -	\$ -	
Total Expenditures	\$ 747,699	\$ 7,735,546	\$ 6,987,847	9.7%
Funding Over/(under) expenditures	\$ 383,041			
YTD % of Budgeted Funds Expended	9.80%			

Budget to Actual by expenditures category as of August 31, 2023



Budget to Actual by Program as of August 31, 2023



AGENDA ITEM SUMMARY

Title	Local Targeted Occupations List (LTOL) for 2nd Quarter of PY 2023-2024
Strategic 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 2nd Quarter of PY 2023-2024
Background	<p>The Department of Commerce (FLORIDACOMMERCE) Bureau of Labor Market Statistics (LMS) has published the 2023-2024 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 are no recommended addition of occupations to the 2nd Quarter of PY 2023-2024 list. Staff recommends approval of this LTOL for the 2nd Quarter of PY 2023-2024.
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

2023-24 Regional Demand Occupations List

Sorted by Occupational Title

Workforce Development Area 20 - Indian River, Martin, and St. 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 \$16.39/hour and Entry Wage of \$13.32/hour
- 4 High Skill/High Wage (HSHW) Occupations:
Mean Wage of \$25.67/hour and Entry Wage of \$16.39/hour

SOC Code*	HSHW**	Occupation Title*	Regional				Statewide				FLDOE Training Code	In EFI Targeted Industry?	Qualifying Level***
			Annual % Growth	Annual Openings	2021 Hourly Wage		Annual % Growth	Annual Openings	2021 Hourly Wage				
132011	HSHW	Accountants and Auditors	1.49	149	35.59	19.68	1.433637	9327	36.69	21.86	5	Yes	R
113012	HSHW	Administrative Services Managers	0.02	4	46.92	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
493011	HSHW	Aircraft Mechanics and Service Technicians	2.18	32	N/A	N/A	1.275075	1424	31.28	19.87	3	Yes	S
532011	HSHW	Airline Pilots, Copilots, and Flight Engineers	0.02	1	118.61	N/A	1.187475	665	111.83	63.62	4	Yes	S
173011	HSHW	Architectural and Civil Drafters	2.06	22	N/A	N/A	1.364712	831	26.84	18.87	3	Yes	S
119041	HSHW	Architectural and Engineering Managers	1.56	10	67.69	45.74	1.762937	723	70.33	46.08	5	Yes	S
274011		Audio and Video Technicians	1.22	4	N/A	N/A	2.493062	1013	24.05	14.84	4	No	S
493021		Automotive Body and Related Repairers	0.01	3	23.51	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
493023		Automotive Service Technicians and Mechanics	0.15	124	21.54	14.49	0.334087	5289	21.79	13.91	3	No	R
194021		Biological Technicians	1.40	21	N/A	N/A	1.887425	566	20.84	14.82	4	Yes	S
433031		Bookkeeping, Accounting, and Auditing Clerks	0.23	320	20.25	14.08	0.222162	12179	20.4	13.86	4	Yes	R
472021		Brickmasons and Blockmasons	0.00	1	21.88	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
493031		Bus and Truck Mechanics and Diesel Engine Specialists	0.88	26	24.59	18.10	1.255837	1594	25.08	18.05	3	No	S
533051		Bus Drivers, School or Special Client	0.01	6	17.12	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
533052		Bus Drivers, Transit and Intercity	N/A	N/A	N/A	N/A	0.73355	1327	20.76	14.27	3	No	S
131199		Business Operations Specialists, All Other											
251011	HSHW	Business Teachers, Postsecondary	0.02	1	49.04	N/A	2.23235	525	45.7	23.69	5	No	S
131020	HSHW	Buyers and Purchasing Agents	0.30	35	27.15	17.46	-0.0122	2608	30.91	18.31	4	Yes	R
535021	HSHW	Captains, Mates, and Pilots of Water Vessels	0.02	1	32.50	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
292031		Cardiovascular Technologists and Technicians	1.40	18	N/A	N/A	1.547	517	24.33	14.2	3	No	S
251194	HSHW	Career/Technical Education Teachers, Postsecondary	0.01	4	30.29	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
435011		Cargo and Freight Agents	N/A	N/A	N/A	N/A	1.385412	1118	22.67	15.36	3	Yes	S
472031		Carpenters	0.91	237	19.95	15.15	0.99115	6762	21.14	15.6	3	No	R
472051		Cement Masons and Concrete Finishers	1.02	40	N/A	N/A	1.4146	1658	19.2	14.09	3	No	S
351011	HSHW	Chefs and Head Cooks	2.31	54	30.36	18.46	1.48045	1972	28.29	16.3	3	No	R
111011	HSHW	Chief Executives	0.00	2	82.40	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
172051	HSHW	Civil Engineers	2.08	30	N/A	N/A	1.6718	1642	45.22	27.52	5	Yes	S
131031	HSHW	Claims Adjusters, Examiners, and Investigators	0.49	14	N/A	N/A	0.09765	2094	31.45	20.39	3	Yes	S
212011		Clergy	1.41	76	23.28	15.34	1.02695	1825	24.58	15.27	5	No	R
292010		Clinical Laboratory Technologists and Technicians	1.71	36	24.55	14.97	1.404137	1891	25.13	15.26	4	No	R
532012	HSHW	Commercial Pilots	2.62	30	N/A	N/A	1.3417	746	52.69	27.66	3	Yes	S
211099		Community and Social Service Specialists, All Other	1.67	10	22.98	15.86	1.559637	546	21.18	15.25	5	No	S
131141	HSHW	Compensation, Benefits, and Job Analysis Specialists	0.89	3	N/A	N/A	1.472312	554	28.75	19.06	4	Yes	S
131041	HSHW	Compliance Officers	1.42	40	32.05	18.58	1.153187	2499	31.63	18.12	3	Yes	R
113021	HSHW	Computer and Information Systems Managers	0.93	11	N/A	N/A	1.824475	2248	70.34	44.67	5	Yes	S
151241	HSHW	Computer Network Architects	0.72	3	N/A	N/A	1.525225	685	53.64	32.8	5	Yes	S

2023-24 Regional Demand Occupations List

Sorted by Occupational Title

Workforce Development Area 20 - Indian River, Martin, and St. 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 \$16.39/hour and Entry Wage of \$13.32/hour
- 4 High Skill/High Wage (HSHW) Occupations:
Mean Wage of \$25.67/hour and Entry Wage of \$16.39/hour

SOC Code*	HSHW**	Occupation Title*	Regional				Statewide				FLDOE Training Code	In EFI Targeted Industry?	Qualifying Level***
			Annual % Growth	Annual Openings	2021 Hourly Wage		Annual % Growth	Annual Openings	2021 Hourly Wage				
151231	HSHW	Computer Network Support Specialists	1.26	14	32.72	23.66	1.442062	887	32.57	21.01	3	Yes	S
519161		Computer Numerically Controlled Tool Operators	0.01	1	22.45	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
151299	HSHW	Computer Occupations, All Other	0.01	3	41.54	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
151211	HSHW	Computer Systems Analysts	1.02	17	43.43	25.15	1.445662	2943	44.58	27.96	4	Yes	S
151232	HSHW	Computer User Support Specialists	0.92	37	25.76	16.52	1.732975	4532	24.95	15.75	3	Yes	R
474011	HSHW	Construction and Building Inspectors	-0.15	29	28.68	19.74	1.055712	1468	30.12	19.06	3	Yes	S
119021	HSHW	Construction Managers	1.38	58	46.84	27.87	1.6407	3377	49.89	28.74	4	No	R
131051	HSHW	Cost Estimators	0.89	44	N/A	N/A	0.902925	1377	31.18	19.13	4	No	S
151242	HSHW	Database Administrators	0.02	2	44.23	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
151243	HSHW	Database Architects	0.02	1	57.12	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
319091		Dental Assistants	2.04	121	19.46	16.06	1.868625	3421	19.63	15.87	3	No	R
291292	HSHW	Dental Hygienists	2.06	58	34.33	28.25	1.87035	1153	35.18	29.19	4	No	R
292032	HSHW	Diagnostic Medical Sonographers	2.26	19	N/A	N/A	2.451512	614	34.27	26.98	3	No	S
472081		Drywall and Ceiling Tile Installers	1.49	30	N/A	N/A	1.099587	788	19.61	14	3	No	S
119032	HSHW	Education Administrators, Kindergarten through Secondary	1.37	33	42.28	27.95	N/A	N/A	N/A	N/A	5	No	R
119033	HSHW	Education Administrators, Postsecondary	0.02	3	43.89	N/A	1.417712	1111	46.05	33.25	5	No	S
173023	HSHW	Electrical and Electronic Engineering Technologists and Technicians	N/A	N/A	N/A	N/A	1.415662	782	29.33	19.14	4	Yes	S
172071	HSHW	Electrical Engineers	1.06	8	N/A	N/A	1.97235	656	45.32	28.99	5	Yes	S
472111		Electricians	1.92	158	22.96	16.70	1.505212	5999	23.6	16.86	3	No	R
172072	HSHW	Electronics Engineers, Except Computer	0.02	2	51.20	N/A	1.692725	519	50.3	35.33	5	Yes	S
252021	HSHW	Elementary School Teachers, Except Special Education	1.35	171	28.52	21.12	1.214537	6265	29.57	21.08	5	No	R
172199	HSHW	Engineers, All Other	0.50	3	N/A	N/A	1.321262	693	49.99	26.74	5	Yes	S
119072	HSHW	Entertainment and Recreation Managers, Except Gambling	0.02	1	40.00	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
113013	HSHW	Facilities Managers	0.02	2	44.38	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
119013	HSHW	Farmers, Ranchers, and Other Agricultural Managers	0.01	7	44.33	N/A	0.097262	5002	44.56	22.53	4	No	S
512051		Fiberglass Laminators and Fabricators	0.01	4	19.04	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
132051	HSHW	Financial and Investment Analysts	0.02	4	46.30	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
113031	HSHW	Financial Managers	2.04	65	61.59	32.50	2.27545	3661	66.29	34.98	5	Yes	R
132054	HSHW	Financial Risk Specialists	0.02	1	46.11	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
132099	HSHW	Financial Specialists, All Other	0.02	2	28.89	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
332011	HSHW	Firefighters	0.72	72	26.19	17.40	0.630787	1626	25.71	16.59	3	No	R
471011	HSHW	First-Line Supervisors of Construction Trades and Extraction Workers	1.27	175	29.75	20.42	1.347287	6420	31.74	21.04	4	No	R
371011		First-Line Supervisors of Housekeeping and Janitorial Workers	0.44	57	20.26	14.44	1.830225	2885	19.74	13.88	3	No	R
371012		First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers	0.41	83	24.61	17.52	1.736762	1982	23.81	16.38	3	No	R
491011	HSHW	First-Line Supervisors of Mechanics, Installers, and Repairers	1.16	74	31.28	20.51	1.22125	3401	31.26	20.64	3	No	R
411012	HSHW	First-Line Supervisors of Non-Retail Sales Workers	-0.39	40	37.37	20.83	0.038825	2634	43.82	23.51	4	Yes	S
431011	HSHW	First-Line Supervisors of Office and Administrative Support Workers	0.48	256	28.25	18.32	0.4849	11899	29.35	18.86	4	Yes	R

2023-24 Regional Demand Occupations List

Sorted by Occupational Title

Workforce Development Area 20 - Indian River, Martin, and St. 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 \$16.39/hour and Entry Wage of \$13.32/hour
- 4 High Skill/High Wage (HSHW) Occupations:
Mean Wage of \$25.67/hour and Entry Wage of \$16.39/hour

SOC Code*	HSHW**	Occupation Title*	Regional				Statewide				FLDOE Training Code	In EFI Targeted Industry?	Qualifying Level***
			Annual % Growth	Annual Openings	2021 Hourly Wage		Annual % Growth	Annual Openings	2021 Hourly Wage				
391022		First-Line Supervisors of Personal Service Workers	0.02	5	23.46	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
511011	HSHW	First-Line Supervisors of Production and Operating Workers	1.43	88	30.66	18.96	1.088612	2870	29.79	18.77	3	Yes	R
411011		First-Line Supervisors of Retail Sales Workers	0.08	301	22.30	14.33	0.024562	10845	22.39	14.19	3	No	R
531047		First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	0.58	73	25.56	16.67	1.456225	4152	26.27	16.95	3	Yes	R
391014		First-Line Supervisory of Entertainment and Recreation Workers, Except Gambling Services	0.02	4	24.23	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
119051	HSHW	Food Service Managers	0.98	130	34.51	20.77	0.594525	3684	35.82	19.55	4	No	R
111021	HSHW	General and Operations Managers	1.31	332	46.28	20.28	1.356512	15477	47.51	21.26	4	Yes	R
472121		Glaziers	2.26	19	N/A	N/A	2.241837	869	20.39	15.29	3	No	S
271024		Graphic Designers	0.31	24	N/A	N/A	0.702787	1716	25.83	16.87	4	Yes	S
292099	HSHW	Health Technologists and Technicians, All Other	0.02	4	21.73	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
499021		Heating, Air Conditioning, and Refrigeration Mechanics and Installers	1.54	143	21.93	15.39	1.1598	4213	22.52	15.77	3	No	R
533032		Heavy and Tractor-Trailer Truck Drivers	1.16	223	20.45	14.00	0.9763	13002	21.62	14.92	3	Yes	R
113121	HSHW	Human Resources Managers	1.20	13	51.70	33.03	1.353275	766	56.98	34.83	5	Yes	S
131071	HSHW	Human Resources Specialists	1.45	86	28.61	17.80	1.346987	5002	31.42	18.49	5	Yes	R
173026	HSHW	Industrial Engineering Technologists and Technicians	0.01	1	28.46	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
172112	HSHW	Industrial Engineers	2.33	8	N/A	N/A	2.3575	1025	44.86	30.14	5	Yes	S
499041	HSHW	Industrial Machinery Mechanics	2.10	25	27.25	19.05	2.154937	1828	26.07	18.12	3	Yes	S
537051		Industrial Truck and Tractor Operators	2.56	177	19.04	14.76	1.826062	4759	19.3	14.88	3	Yes	R
151212	HSHW	Information Security Analysts	2.83	6	N/A	N/A	4.135675	1047	49.44	30.8	3	Yes	S
413021		Insurance Sales Agents	1.28	94	N/A	N/A	1.058812	5238	28.19	14.47	3	Yes	S
273091		Interpreters and Translators	3.07	7	N/A	N/A	3.146237	522	24.63	13.67	4	Yes	S
252012	HSHW	Kindergarten Teachers, Except Special Education	1.56	12	N/A	N/A	1.204462	979	28.39	19.71	5	No	S
292061		Licensed Practical and Licensed Vocational Nurses	2.03	167	22.95	19.44	1.569787	3969	23.01	18.96	3	No	R
132072	HSHW	Loan Officers	-0.75	26	35.09	15.98	0.186937	1467	35.86	17.27	4	Yes	S
119081	HSHW	Lodging Managers	0.02	2	37.93	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
131081	HSHW	Logisticians	3.73	11	28.30	15.58	1.465175	932	33.32	20	5	Yes	S
514041		Machinists	1.88	36	N/A	N/A	1.36225	1125	22.14	15.46	3	Yes	S
499071		Maintenance and Repair Workers, General	0.02	41	19.47	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
131111	HSHW	Management Analysts	1.92	97	40.52	23.50	1.84815	8036	41.63	22.17	5	Yes	R
119199	HSHW	Managers, All Other	0.02	9	50.29	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
131161	HSHW	Market Research Analysts and Marketing Specialists	2.49	106	30.34	17.34	2.726837	6860	32.99	18.28	5	Yes	R
112021	HSHW	Marketing Managers	1.26	18	N/A	N/A	1.537612	1463	72.48	36.91	5	Yes	S
319011		Massage Therapists	0.03	11	23.46	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
172141	HSHW	Mechanical Engineers	2.02	11	43.22	27.22	1.745	711	43.3	27.76	5	Yes	S
119111	HSHW	Medical and Health Services Managers	4.01	89	47.10	28.78	N/A	N/A	N/A	N/A	5	No	R

2023-24 Regional Demand Occupations List

Sorted by Occupational Title

Workforce Development Area 20 - Indian River, Martin, and St. 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 \$16.39/hour and Entry Wage of \$13.32/hour
- 4 High Skill/High Wage (HSHW) Occupations:
Mean Wage of \$25.67/hour and Entry Wage of \$16.39/hour

SOC Code*	HSHW**	Occupation Title*	Regional				Statewide				FLDOE Training Code	In EFI Targeted Industry?	Qualifying Level***
			Annual % Growth	Annual Openings	2021 Hourly Wage		Annual % Growth	Annual Openings	2021 Hourly Wage				
319092		Medical Assistants	2.05	227	16.88	13.68	2.342537	9263	17.06	13.72	3	No	R
292036	HSHW	Medical Dosimetrists	0.01	1	65.29	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
499062		Medical Equipment Repairers	0.86	12	N/A	N/A	1.490575	569	24.55	15.53	3	Yes	S
292072		Medical Records Specialist	0.01	5	22.74	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
436013		Medical Secretaries and Administrative Assistants	1.45	131	17.18	13.79	1.498862	5104	17.21	13.53	3	No	R
131121		Meeting, Convention, and Event Planners	2.41	16	N/A	N/A	1.803925	1150	25.39	15.27	4	Yes	S
252022	HSHW	Middle School Teachers, Except Special and Career/Technical Education	1.34	87	28.67	21.27	1.221925	2908	28.98	20.31	5	No	R
493042		Mobile Heavy Equipment Mechanics, Except Engines	1.29	11	23.12	16.98	1.103387	937	24.11	17.19	3	Yes	S
493051		Motorboat Mechanics and Service Technicians	1.67	34	N/A	N/A	1.1237	507	24.18	15.78	3	Yes	S
151244	HSHW	Network and Computer Systems Administrators	0.98	17	35.13	21.99	1.337562	1592	39.34	24.6	4	Yes	S
311131		Nursing Assistant	0.02	40	15.43	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
312011	HSHW	Occupational Therapy Assistants	0.04	4	34.76	N/A	3.356887	588	31.43	24.74	4	No	S
472073		Operating Engineers and Other Construction Equipment Operators	0.23	69	19.96	15.73	0.959725	2869	21.27	15.72	3	No	R
472141		Painters, Construction and Maintenance	0.89	113	N/A	N/A	0.952862	3163	18.62	14.28	3	No	S
232011		Paralegals and Legal Assistants	0.53	108	23.37	16.62	1.8048	4961	25.93	17.89	3	Yes	R
292043	HSHW	Paramedics	0.02	2	29.04	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
132052	HSHW	Personal Financial Advisors	0.26	32	N/A	N/A	0.565975	1939	50.42	20.04	5	No	S
372021		Pest Control Workers	1.17	40	N/A	N/A	1.357662	1557	18.6	13.66	3	No	S
292052		Pharmacy Technicians	1.29	54	17.17	13.74	0.955262	2629	17.33	13.75	3	No	R
319097		Phlebotomists	2.09	31	N/A	N/A	2.28795	1214	17.17	13.78	3	No	S
312021	HSHW	Physical Therapist Assistants	3.35	37	N/A	N/A	3.386962	1330	31.22	22.28	4	No	S
291071	HSHW	Physician Assistants	3.85	18	N/A	N/A	3.987412	837	50.39	28.97	5	No	S
472151		Pipelayers	0.01	1	20.38	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
472152		Plumbers, Pipefitters, and Steamfitters	1.20	94	23.17	16.81	1.101187	3524	23.13	16.6	3	No	R
333051	HSHW	Police and Sheriff/Es Patrol Officers	0.63	55	28.44	21.43	0.595812	3358	31.88	22.46	3	No	R
251199	HSHW	Postsecondary Teachers, All Other	N/A	N/A	N/A	N/A	1.46945	2167	33.81	19.75	4	No	S
272012	HSHW	Producers and Directors	1.50	3	N/A	N/A	1.810875	774	34.98	18.61	5	Yes	S
131082	HSHW	Project Management Specialists	0.01	17	42.60	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
119141	HSHW	Property, Real Estate, and Community Association Managers	0.72	83	30.23	15.80	1.087675	3497	32.01	17.33	4	No	R
292053		Psychiatric Technicians	0.02	11	18.03	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
273031	HSHW	Public Relations Specialists	1.07	40	27.45	17.33	1.4035	1596	30.57	17.13	5	Yes	R
435031		Public Safety Telecommunications	0.01	2	22.45	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
292034	HSHW	Radiologic Technologists and Technicians	1.41	43	26.85	20.37	1.3897	1359	28.64	20.96	3	No	R
419021	HSHW	Real Estate Brokers	0.01	4	41.25	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
291141	HSHW	Registered Nurses	1.73	387	33.35	25.96	1.52785	13568	34.62	26.5	4	No	R
291126	HSHW	Respiratory Therapists	3.10	21	N/A	N/A	3.02875	742	29.37	24.46	4	No	S
472181		Roofers	2.80	185	N/A	N/A	2.35465	3616	19.63	14.17	3	No	S

2023-24 Regional Demand Occupations List

Sorted by Occupational Title

Workforce Development Area 20 - Indian River, Martin, and St. 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 \$16.39/hour and Entry Wage of \$13.32/hour
- 4 High Skill/High Wage (HSHW) Occupations:
Mean Wage of \$25.67/hour and Entry Wage of \$16.39/hour

SOC Code*	HSHW**	Occupation Title*	Regional				Statewide				FLDOE Training Code	In EFI Targeted Industry?	Qualifying Level***
			Annual % Growth	Annual Openings	2021 Hourly Wage		Annual % Growth	Annual Openings	2021 Hourly Wage				
112022	HSHW	Sales Managers	0.34	35	N/A	N/A	1.37005	2575	61.04	30.43	5	Yes	S
414012	HSHW	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	0.74	230	32.44	15.96	0.8298	9474	32.58	16.02	3	Yes	R
414011	HSHW	Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	0.38	34	N/A	N/A	1.047487	2619	43.77	21.11	3	Yes	S
252031	HSHW	Secondary School Teachers, Except Special and Career/Technical Education	N/A	N/A	N/A	N/A	1.22005	3890	30.83	21.75	5	No	S
413031	HSHW	Securities, Commodities, and Financial Services Sales Agents	-0.06	68	35.77	19.04	0.491687	3393	37.75	18.8	5	No	S
492098		Security and Fire Alarm Systems Installers	0.39	9	N/A	N/A	2.003087	687	22.9	16.23	3	No	S
472211		Sheet Metal Workers	1.29	24	N/A	N/A	1.432812	1016	21.68	15.24	3	Yes	S
435071		Shipping, Receiving, and Traffic Clerks	0.00	3	17.45	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
211093		Social and Human Service Assistants	0.02	18	19.33	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
151252	HSHW	Software Developers	0.02	33	50.96	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
151253	HSHW	Software Quality Assurance Analysts and Testers	0.02	5	37.12	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
252052	HSHW	Special Education Teachers, Kindergarten and Elementary School	1.72	5	N/A	N/A	1.224575	615	30.63	19.78	5	No	S
252058	HSHW	Special Education Teachers, Secondary School	0.02	4	34.09	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
537065		Stockers and Order Fillers	0.02	90	16.25	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
472221		Structural Iron and Steel Workers	0.01	2	23.80	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
211018		Substance Abuse, Behavioral Disorder, and Mental Health Counselors	2.65	59	23.03	16.01	2.371537	2200	24.04	15.52	5	No	R
292055		Surgical Technologists	2.05	23	N/A	N/A	1.633062	755	23.1	17.6	3	No	S
173031		Surveying and Mapping Technicians	1.09	17	21.38	14.62	1.645612	717	20.52	14.73	3	Yes	S
492022		Telecommunications Equipment Installers and Repairers, Except Line Installers	0.63	47	N/A	N/A	1.413525	2320	25.27	16.05	3	No	S
499052		Telecommunications Line Installers and Repairers	1.21	9	N/A	N/A	1.307987	814	22.57	16.56	3	No	S
472044		Tile and Stone Setters	1.82	26	N/A	N/A	2.057787	777	20.23	14.53	3	No	S
131151	HSHW	Training and Development Specialists	1.46	67	27.93	15.79	1.576162	2558	29.87	17.25	5	Yes	R
113071	HSHW	Transportation, Storage, and Distribution Managers	1.07	10	49.15	26.02	1.446025	757	49.75	28.08	4	Yes	S
292056		Veterinary Technologists and Technicians	0.03	8	18.32	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
319096		Veterinary Assistants and Laboratory Animal Caretakers	0.03	7	15.77	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
151255	HSHW	Web and Digital Interface Designers	0.01	1	37.36	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
151254	HSHW	Web Developers	0.02	2	42.07	N/A	N/A	N/A	N/A	N/A	N/A	N/A	R
514121		Welders, Cutters, Solderers, and Brazers	1.72	47	21.58	16.65	1.352662	1917	21.31	15.86	3	Yes	R

AGENDA ITEM SUMMARY

Title	Internal Control Questionnaire (ICQ) for PY 2023-2024
Strategic Goal	Optimal Use of Resources
Policy/Plan/Law	Workforce Innovation & Opportunity Act: Role of LWDB's
Action Required	Review and Approve Internal Control Questionnaire (ICQ) For PY 2023-20234
Background	<p>The Internal Control Questionnaire (ICQ) has been developed by the Department of Commerce (FLORIDACOMMERCE) as a self-assessment tool for the agency's sub recipients to help evaluate whether a system of sound internal control exists within their organization. An effective system of internal control provides reasonable assurance that management's goals are being properly pursued. Each organization's management team sets the tone and has ultimate responsibility for a strong system of internal controls.</p> <p>The ICQ is submitted to FLORIDACOMMERCE by the President/CEO of the organization. Responses should reflect the entity's management team's knowledge and perspective of the controls in place as of the time the questionnaire is completed.</p>
Staff Recommendation	Review and Approve Internal Control Questionnaire (ICQ) for PY 2023-2024
Supporting Materials	Completed Internal Control Questionnaire (ICQ) for PY 2023-2024
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com 866-482-4473 ext. 418</p>

2023-2024 Internal Control Questionnaire and Assessment

Bureau of Financial Monitoring and Accountability
Florida Department of Commerce

September 25, 2023

FLORIDACOMMERCE

107 East Madison Street
Caldwell Building
Tallahassee, Florida 32399
www.floridajobs.org

TABLE OF CONTENTS

OVERVIEW 3
Control Environment..... 7
Risk Assessment..... 9
Control Activities 11
Information and Communication 14
Monitoring Activities..... 15
Attachment A 17

OVERVIEW

Introduction and Purpose

The Internal Control Questionnaire and Assessment (ICQ) was developed by the Florida Department of Commerce (FloridaCommerce), Bureau of Financial Monitoring and Accountability, as a self-assessment tool to help evaluate whether a system of sound internal control exists within the Local Workforce Development Board (LWDB). An effective system of internal control provides reasonable assurance that management's goals are being properly pursued. Each LWDB's management team sets the tone and has ultimate responsibility for a strong system of internal control.

The self-assessment ratings and responses should reflect the controls in place or identify areas where additional or compensating controls could be enhanced. When the questionnaire and the certification are complete, LWDB's submit them to FloridaCommerce by uploading to SharePoint.

Definition and Objectives of Internal Control

Internal control is a process, effected by an entity's board of directors, management, and other personnel, designed to provide "reasonable assurance" regarding the achievement of objectives in the following categories:

- Effectiveness and efficiency of operations
- Reliability of financial reporting
- Compliance with applicable laws and regulations

The concept of reasonable assurance implies the internal control system for any entity will offer a reasonable level of assurance that operating objectives can be achieved.

Need for Internal Control

Internal control helps to ensure the direction, policies, procedures, and practices designed and approved by management and the governing board are put in place and are functioning as designed/desired. Internal control should be designed to achieve the objectives and adequately safeguard assets from loss or unauthorized use or disposition, and to provide assurance that assets are used solely for authorized purposes in compliance with federal and state laws, regulations, and program compliance requirements. Additionally, Title 2, Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, § 200.303 Internal controls, states:

The non-federal entity must:

- (a) Establish and maintain effective internal control over the federal award that provides reasonable assurance that the non-federal entity is managing the federal award in compliance with Federal statutes, regulations, and the terms and conditions of the federal award. These internal controls should be in compliance with guidance in “Standards for Internal Control in the Federal Government” issued by the Comptroller General of the United States and the “Internal Control Integrated Framework”, issued by the Committee of Sponsoring Organizations of the Treadway Commission (COSO).
- (b) Comply with federal statutes, regulations, and the terms and conditions of the federal awards.
- (c) Evaluate and monitor the non-federal entity's compliance with statutes, regulations, and the terms and conditions of federal awards.
- (d) Take prompt action when instances of noncompliance are identified, including noncompliance identified in audit findings.
- (e) Take reasonable measures to safeguard protected personally identifiable information and other information the federal awarding agency or pass-through entity designates as sensitive, or the non-federal entity considers sensitive consistent with applicable federal, state, and local laws regarding privacy and obligations of confidentiality.

What Internal Control Cannot Do

As important as an internal control system is to an organization, an effective system will not guarantee an organization's success. Effective internal control can keep the right people, such as management and the governing board members, informed about the organization's operations and progress toward goals and objectives. However, this control cannot protect against economic downturns or make an understaffed entity operate at full capacity. Internal control can only provide *reasonable, but not absolute, assurance* the entity's objectives can be met. Due to limitations inherent to all internal control systems, breakdowns in the internal control system may be caused by a simple error or mistake, or by faulty judgments made at any level of management. In addition, control may be circumvented by collusion or by management override. The design of the internal control system is dependent upon the resources available, which means there must be a cost-benefit analysis performed as part of designing the internal control system.

Five Components of Internal Control

- **Control Environment** – is the set of standards, processes, and structures that provide the basis for carrying out internal control across the organization. The board of directors and senior

management establish the tone at the top regarding the importance of internal control and expected standards of conduct.

- **Risk Assessment** – involves a dynamic and iterative process for identifying and analyzing risks to achieving the entity’s objectives, forming a basis for determining how risks should be managed. Management considers possible changes in the external environment and within its own business model that may impede its ability to achieve objectives.
- **Control Activities** – are the actions established by policies and procedures to help ensure that management directives mitigate risks so the achievement of objectives are carried out. Control activities are performed at all levels of the entity and at various stages within business processes, and over the technology environment.
- **Information and Communication** – are necessary for the entity to carry out internal control responsibilities in support of achieving its objectives. Communication occurs both internally and externally and provides the organization with the information needed to carry out day-to-day internal control activities. Communication enables personnel to understand internal control responsibilities and their importance to the achievement of objectives.
- **Monitoring** – are ongoing evaluations, separate evaluations, or some combination of the two used to ascertain whether the components of internal controls, including controls to affect the principles within each component, are present and functioning. Findings are evaluated and deficiencies are communicated in a timely manner, with serious matters reported to senior management and to the board of directors.

Makeup of the ICQ

Subsequent sections of this document emphasize the “17 Principles” of internal control developed by the COSO and presented in the Internal Controls – Integrated Framework. The five components of internal control listed above are fundamentally the same as the five standards of internal control and reflect the same concepts as the “Standards for Internal Control in the Federal Government.”

The principles are reflected in groupings of questions related to major areas of control focus within the organization. Each question represents an element or characteristic of control that is or can be used to promote the assurance that operations are executed as management intended.

It should be noted that entities may have adequate internal control even though some or all of the listed characteristics are not present. Entities could have other appropriate internal control operating effectively that are not included here. The entity will need to exercise judgment in determining the most appropriate

and cost effective internal control in any given environment or circumstance to provide reasonable assurance for compliance with federal program requirements.

Completing the Questionnaire

On a scale of 1 to 5, with “1” indicating the area of greatest need for improvements in internal control and “5” indicating that a very strong internal control exists, select the number that best describes your current operating environment. Please provide details in the comments/explanations column for each statement with a score of 1 or 2. **For questions requiring a narrative, please provide in the comments/explanations column.**

Certification of Self-Assessment of Internal Controls

Attachment A, includes a certification which should be completed and signed by the LWDB Executive Director, reviewed, and signed by the LWDB Chair or their designee, and uploaded to SharePoint.

CONTROL ENVIRONMENT

		<i>Self-Assessment of Policies, Procedures, and Processes</i>					Comments/Explanations
		<i>Weak</i>		<i>Strong</i>			
		1	2	3	4	5	
Principle 1. The organization demonstrates a commitment to integrity and ethical values.							
1.	The LWDB’s management and board of directors’ commitment to integrity and ethical behavior is consistently and effectively communicated throughout the LWDB, both in words and deeds.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2.	The LWDB has a code of conduct and/or ethics policy that is periodically updated and has been communicated to all staff, board members, and contracted service providers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3.	When the LWDB hires employees from outside of the organization the person is trained or made aware of the importance of high ethical standards and sound internal control.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4.	The LWDB management has processes in place to evaluate the performance of staff and contracted service providers against the expected standards of conduct.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Principle 2. The board of directors demonstrates independence from management and exercises oversight of the development and performance of internal controls.							
5.	The board of directors define, maintain, and periodically evaluate the skills and expertise needed among its members to enable them to question and scrutinize management’s activities and present alternate views, and act when faced with obvious or suspected wrongdoing.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6.	The board of directors oversees the LWDB’s design, implementation, and operation of the organizational structure so the board of directors can fulfil its responsibilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7.	The board of directors and/or audit committee maintains a direct line of communication with the LDWB’s external auditors and internal monitors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
8.	The board of directors establishes the expectations and evaluates the performance of the chief executive officer or equivalent role.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Principle 3. Management establishes, with LDWB oversight, organizational structure, reporting lines, and appropriate authorities and responsibilities in the pursuit of objectives.						
9.	Management periodically reviews and modifies the organizational structure of the LWDB in light of anticipated changing conditions or revised priorities. Please provide the date of last review.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.	Specific lines of authority and responsibility are established to ensure compliance with federal and state laws and regulations and a proper segregation of duties.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11.	The LWDB management maintains documentation of controls, including changes to controls, to meet operational needs and retain organizational knowledge.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Principle 4. The organization demonstrates a commitment to attract, develop, and retain competent individuals in alignment with objectives.						
12.	The LWDB's recruitment processes are centered on competencies necessary for success in the proposed role.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13.	The LWDB provides training opportunities or continuing education to develop and retain sufficient and competent personnel. Training includes a focus on managing awards in compliance with federal and state statutes, regulations, and the terms and conditions of the award.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14.	The LWDB has succession plans for senior management positions and contingency plans for assignments of responsibilities important for internal control.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Principle 5. The organization evaluates performance and holds individuals accountable for their internal control responsibilities in the pursuit of objectives.						
15.	Job descriptions include appropriate knowledge and skill requirements for all employees. Components of performance expectations are consistent with federal and state requirements applicable to each position. For all employees, the LWDB regularly evaluates performance and shares the results with the employee.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

16.	The LWDB has mechanisms in place to ensure that all required information is timely published to the LWDB’s website in a manner easily accessed by the public in compliance with laws, regulations, and provisions of grant agreements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
17.	The LWDB’s management structure and tone at the top helps establish and enforce individual accountability for performance of internal control responsibilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
18.	The LWDB has policies, processes and controls in place to evaluate performance and promote accountability of contracted service providers (and other business partners) and their internal control responsibilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

RISK ASSESSMENT

		<i>Self-Assessment of Policies, Procedures, and Processes</i>					Comments/Explanations
		<i>Weak</i>		<i>Strong</i>			
		1	2	3	4	5	
Principle 6. The organization defines objectives clearly to enable the identification of risks and define risks tolerances.							
19.	Management establishes a materiality threshold for each of its major objectives and identifies risk at each location where the LWDB conducts activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
20.	Management uses operational objectives as a basis for allocating the resources needed to achieve desired operational and financial performance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
21.	The LWDB sets entity-wide financial reporting controls and assesses the risks that those controls will not prevent material misstatements, errors, or omissions in the financial statements. Financial reporting controls are consistent with the requirements of federal awards.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Principle 7. The organization identifies risks to the achievement of its objectives across the organization and analyzes risks as a basis for determining how the risks should be managed.							
22.	Management ensures that risk identification and analysis consider internal and external factors and their potential impact on the achievement of objectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

RISK ASSESSMENT

		<i>Self-Assessment of Policies, Procedures, and Processes</i>					Comments/Explanations
		<i>Weak</i>		<i>Strong</i>			
		1	2	3	4	5	
23.	The LWDB adequately and effectively manages risks to the organization and has designed internal controls in order to mitigate the known risks. What new controls, if any, have been implemented since the prior year and which organizational risks do they mitigate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
24.	The LWDB’s risk identification/assessment is broad and includes both internal and external business partners and contracted service providers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Principle 8. The organization considers the potential for fraud in assessing risks to the achievement of objectives.							
25.	The LWDB periodically performs an assessment of each of its operating locations’ exposure to fraudulent activity and how the operations could be impacted.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
26.	The LWDB’s assessment of fraud risks considers opportunities for: <ul style="list-style-type: none"> • unauthorized acquisition, use and disposal of assets; • altering accounting and reporting records; • corruption such as bribery or other illegal acts; and • other forms of misconduct, such as waste and abuse. Provide a narrative of the system/process for safeguarding cash on hand, such as prepaid program items (i.e. gas cards, Visa cards) against unauthorized use/distribution.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Principle 9. The organization identifies, assesses, and responds to changes that could significantly impact the system of internal control.						
27.	The LWDB has mechanisms in place to identify and react to significant changes presented by internal conditions including the LWDB’s programs or activities, oversight structure, organizational structure, personnel, and technology that could affect the achievement of objectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28.	The LWDB has mechanisms in place to identify and react to significant changes presented by external conditions including governmental, economic, technological, legal, regulatory, and physical environments that could affect the achievement of objectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29.	Considering significant changes affecting the LWDB, existing controls have been identified and revised to mitigate risks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CONTROL ACTIVITIES

<i>Self-Assessment of Policies, Procedures, and Processes</i>					Comments/Explanations
<i>Weak</i>		<i>Strong</i>			
1	2	3	4	5	

Principle 10. The organization selects and develops control activities that contribute to the mitigation of risks to the achievement of objectives to acceptable levels.						
30.	The LWDB has a written business continuity plan which includes contingencies for business processes, assets, human resources, and business partners, and is periodically evaluated and updated to ensure continuity of operations to achieve program objectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
31.	Controls employed by the LWDB include authorizations, approvals, comparisons, physical counts, reconciliations, supervisory controls, and ensure allowable use of funds. What type of training is provided to program and administration staff to ensure the allowable use of grant funds?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Principle 11. The organization selects and develops general control activities over technology to support the achievement of objectives.						
32.	The LWDB periodically (e.g., quarterly, semiannually) reviews system privileges and access controls to the different applications and databases within the IT infrastructure to determine whether system privileges and access controls are appropriate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
33.	Management selects and develops control activities that are designed and implemented to restrict technology access rights to authorized users commensurate with their job responsibilities and to protect the organization's assets from external threats.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34.	Management has identified the appropriate technology controls that address the risks of using applications hosted by third parties.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35.	The LWDB has considered the protection of personally identifiable information (PII), as defined in section 501.171(1)(g)1, F.S., of its employees, participants/clients and vendors, and have designed and implemented policies that mitigate the associated risks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
36.	The LWDB has established organizational processes and procedures to address cybersecurity risks to its critical information infrastructure. (Reference: National Institute of Standards and Technology (NIST) Cybersecurity Framework) What measures are being taken to address the risk of cybersecurity in the organization?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Principle 12. The organization deploys control activities through policies that establish what is expected and procedures that put policies into action.						
37.	The LWDB has policies and procedures addressing proper segregation of duties between the authorization, custody, and recordkeeping for the following tasks, if applicable: Prepaid Program Items (Participant Support Costs), Cash/Receivables, Equipment, Payables/Disbursements, Procurement/Contracting, and Payroll/Human Resources.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
38.	The LWDB has written procedures that minimize the time elapsing between the receipt of advanced funds and disbursement of funds as required by 2 CFR 200.305(b)(1).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
39.	The LWDB has processes to ensure the timely submission of required reporting (i.e., financial reports, performance reports, audit reports, internal monitoring reviews, or timely resolution of audit findings).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
40.	The LWDB has a records retention policy and has implemented internal controls to ensure all records are retained, safeguarded, and accessible, demonstrating compliance with laws, regulations, and provisions of contracts and grant agreements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
41.	LWDB periodically reviews policies, procedures, and related control activities for continued relevance and effectiveness. Changes may occur in personnel, operational processes, information technology, or governmental regulations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

INFORMATION AND COMMUNICATION

		Self-Assessment of Policies, Procedures, and Processes					Comments/Explanations
		Weak		Strong			
		1	2	3	4	5	
Principle 13. The organization obtains or generates and uses relevant, quality information to support the functioning of internal control.							
42.	Federal, state, or grant program rules or regulations are reviewed by one or more of the following: governing board, audit, finance or other type committee. How often are these reviewed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
43.	The LWDB considers both internal and external sources of data when identifying relevant information to use in the operation of internal control.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
44.	The LWDB has controls in place to ensure costs are accurately recorded and allocated to the benefiting federal/state fund or grant.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Principle 14. The organization internally communicates quality information, including objectives and responsibilities for internal control, necessary to support the functioning of internal control.							
45.	Communication exists between personnel, management, and the board of directors so that quality information is obtained to help management achieve the LWDB's objectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
46.	There is a process to quickly disseminate critical information throughout the LWDB when necessary. Provide a description of the dissemination process.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
47.	Management has a process for the development, approval and implementation of policy updates and communicates those updates to staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Principle 15. The organization communicates with external parties regarding matters affecting the functioning of internal controls.						
48.	The LWDB has a means for anyone to report suspected improprieties regarding fraud; errors in financial reporting, procurement, and contracting; improper use or disposition of equipment; and misrepresentation or false statements. Describe the process of how someone could report improprieties. Who receives/processes/investigates, etc.?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
49.	The LWDB has processes in place to communicate relevant and timely information to external parties.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
50.	The LWDB has processes in place to communicate the results of reports provided by the following external parties: Independent Auditor, FloridaCommerce Bureau of Financial Monitoring and Accountability, FloridaCommerce Bureau of One-Stop and Program Support, FloridaCommerce Office of Inspector General, Florida Auditor General, and federal awarding agencies (U.S. Department of Labor, U.S. Department of Health and Human Services, and U.S. Department of Agriculture to the Board of Directors).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MONITORING ACTIVITIES

<i>Self-Assessment of Policies, Procedures, and Processes</i>					Comments/Explanations
<i>Weak</i>		<i>Strong</i>			
1	2	3	4	5	

Principle 16. The organization selects, develops, and performs ongoing and/or separate evaluations to ascertain whether the components of internal controls are present and functioning.						
51.	The LWDB periodically evaluates its business processes such as cash management, comparison of budget to actual results, repayment or reprogramming of interest earnings, draw down of funds, procurement, and contracting activities. Describe the process of how funding decisions are determined. What is the criteria, who initiates/approves, etc.?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MONITORING ACTIVITIES

		<i>Self-Assessment of Policies, Procedures, and Processes</i>					Comments/Explanations
		<i>Weak</i>		<i>Strong</i>			
		1	2	3	4	5	
52.	The LWDB considers the level of staffing, training and skills of people performing the monitoring given the environment and monitoring activities which include observations, inquiries and inspection of source documents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
53.	LWDB management periodically visits all career center locations in its local area (including subrecipients) to ensure the policies and procedures are being followed and functioning as intended. When was the most recent visit performed, by whom, and who were the results communicated to?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Principle 17. The organization evaluates and communicates internal control deficiencies in a timely manner to those parties responsible for taking corrective action, including senior management and the board of directors, as appropriate.							
54.	The LWDB management takes adequate and timely actions to correct deficiencies identified by the external auditors, financial and programmatic monitoring, or internal reviews.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
55.	The LWDB monitors all subrecipients to ensure that federal funds provided are expended only for allowable activities, goods, and services and communicates the monitoring results to the board of directors. Are subrecipient monitoring activities outsourced to a third party? If so, provide the name of the party that performs the subrecipient monitoring activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

ATTACHMENT A

Florida Department of Commerce Certification of Self-Assessment of Internal Controls

Local Workforce Development Board Number: _____

To be completed by the Executive Director:

A self-assessment of internal control has been conducted for the 2023-2024 fiscal monitoring period. As part of this self-assessment, the Internal Control Questionnaire developed by the Florida Department of Commerce has been completed and is available for review.

Signature: _____

Printed Name: _____

Title: _____

Date: _____

To be completed by the Board Chairperson or their designee:

I have reviewed the self-assessment of internal control that was conducted for the 2023-2024 fiscal monitoring period.

Signature: _____

Printed Name: _____

Title: _____

Date: _____

Please scan and upload to SharePoint an executed copy of this certification on or before **October 25, 2023**.

AGENDA ITEM SUMMARY

Title	Department of Commerce (FLORIDACOMMERCE) - Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs from July 1, 2023 - June 30, 2024
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	CareerSource Florida Administrative Policy Number 118
Action Requested	Review and Approve the FLORIDACOMMERCE - Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs from July 1, 2023 - June 30, 2024
Background	FLORIDACOMMERCE and the State Workforce Development Board will continue to grant the authority, on behalf of the Governor, to allow Local Workforce Development Boards to transfer up to an including 100 percent of the funds allocated to local areas for adult activities for expenditure on dislocated worker activities, and up to 100 percent of funds allocated to local areas for dislocated worker activities for expenditures on adult activities. Local Workforce Development Boards are required to ensure any transfer of funds between WIOA programs complies with federal law and to record and document their use and application of local funds.
Staff Recommendations	Review and Approve FLORIDACOMMERCE - Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs from July 1, 2023 - June 30, 2024
Supporting Material	FLORIDACOMMERCE - Prior Approval Transfer Request Form - WIOA Adult 2023 and Dislocated Worker (DW) 2023 funding for Programs from July 1, 2023 - June 30, 2024
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418



**Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs
From July 1, 2023 through June 30, 2024**

LWDB Number and Name (Requestor): LWDB 20 CareerSource Research Coast

Name / Title of Requestor Representative: Brian Bauer, President/CEO

Adult and Dislocated Worker Transfer Request

Program Year	Program	Total Award Amount	Amount of Adult Requested to be Spent on DW	Percentage of Adult Requested to be Spent on DW	Amount of DW Requested to be Spent on Adult	Percentage of DW Requested to be Spent on Adult
2021	DLW	933,262.00	0.00	0	645,150.00	69%

COMPLETE THE BELOW SECTIONS FOR REQUESTS THAT EXCEED 25% OF THE PROGRAM'S ANNUAL ALLOCATION

Reason for requesting the use of one program's funding for the other (e.g. anticipated depletion of current funds, changes in labor market conditions, etc.):

LWDB 20 anticipates to fully expend the WIOA Adult - 2023 funding prior June 2024 and requests the ability to utilize \$645,150 of WIOA DLW - 2023 funding to be spent on PY23-24 WIOA Adult expenditures.

A description of outreach/marketing activities conducted to ensure underserved populations were aware of available services:

Website, social media such as Facebook, Instagram, LinkedIn and Radio advertising, job fairs, flyers and print advertising.

Labor market conditions contributing to the need for the transfer:

Current labor market conditions have led to a decrease in Dislocated worker participation, and there is still a greater need for WIOA Adult participant funding for training, staff, and operating expenditures.

The number of participants originally planned to be served by the base allocation compared to the estimated number of participants expected to be served after funds are transferred.

LWDB20 WIOA DW 2023 funding transfer to WIOA Adult 2023 in the amount stated would allow for an estimated 154 additional WIOA Adult participants to be served in PY23-24. The resulting WIOA DW 23 funding will serve approximately 48 DW participants. Based on the prior 3 years average DW participant count, The remaining funding would serve an additional 38 participants, which is a 300% increase in DW participant count.

COMPLETE THE BELOW CERTIFICATION FOR REQUESTS THAT EXCEED 25% OF THE PROGRAM'S ANNUAL ALLOCATION

I certify the following:

1. When transferring from Adult to Dislocated Worker - The LWDB has sufficient funds to serve the WIOA Adult priority populations.
2. When transferring from Dislocated Worker to Adult - The LWDB has sufficient Dislocated Worker funds to serve dislocated workers in the local area; there are no pending layoffs that may impact the need for dislocated workers in the local area.
3. The full board voted to approve this request to transfer funds and a copy of the LWDB's meeting minutes are included with this request.

I certify the above information is true and correct.

Signature of Board Chair

Print Name

Date

Agenda Item 8a

AGENDA ITEM SUMMARY

Title	St. Lucie County Comprehensive Center
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Operation Intelligence
Action Requested	None. Information Only.
Background	Operational - Business Needs
Staff Recommendations	None. Information Only.
Supporting Material	Letter of Intent
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext.418

Douglas Legler
NAI Southcoast

Re: Letter of Intent to lease Units A-C at 4152 Okeechobee Rd, Fort Pierce Florida

Dear Doug:

On behalf of Workforce Development Board of the Treasure Coast, Inc (“Tenant”), we are pleased to present a letter of intent to lease units A-C at 4152 Okeechobee Rd, Fort Pierce, Florida (the “Building”).

Premises: Landlord leases to Tenant Units A-C containing 3,172 sq ft. (Plus the required amount of parking spaces)

Landlord: 4150 Plaza LLC

Tenant: Workforce Development Board of the Treasure Coast, Inc
dba CareerSource Research Coast
584 NW University Blvd
Port Saint Lucie, Fl 34986

Use: Office space to be the company’s main “comprehensive center”.

Lease Term: Ten (10) Years or longer.

Renewal: Tenant will have (2) options to renew its lease, for additional periods of five (5) years each. Base Rent for any renewal term shall increase each year by 3% over the then Base Rent.

Lease/Rent Commencement Date: 60 Days from execution of a lease. This will allow them to provide adequate notice for their existing space.

Base Rent: \$11.00 per square foot

Free Rent: The Landlord will provide a rent concession equivalent to 1 month of free rent to help offset anticipated tenant work to be done.

Annual Rent Increases: 3%

Operating Expenses: This lease will be a on a triple net basis, so that the tenant is responsible for their pro-rata share of all real estate taxes and CAM charges, reported at a total cost \$5.25 per square foot. The landlord will be responsible for all structural repairs, including the roof, building exterior walls, windows (unless damaged by the tenant) and parking lot areas. The tenant will be responsible to maintain all HVAC units. Landlord to be responsible to replace the HVAC units that have met their life expectancy or that have been rendered to not be cost effective to repair. Landlord to provide an annual reconciliation statement in January of each anniversary.

Condition of Premises

Landlord Work: Space to be delivered “As Is” with working HVAC units.

Architectural and Construction Management Documentation:

Landlord shall provide all available architectural, construction and mechanical. Tenant to provide approved floor plans for proposed work to be done by the Tenant.

Owner’s Transaction Broker:

NAI Southcoast /Douglas Legler
Commission: 50% of total commission to be paid by the Seller at lease signing.

Tenant’s Transaction Broker:

The Keyes Company / Alex Adorno
Commission: 50% of total commission to be paid by the Seller at lease signing.

Security Deposit:

Tenant will deliver to Landlord a security deposit equal to one month’s Base Rent upon execution of the lease.

Lease Termination:

A) The proposed lease may be terminated by the Lessee if the Lessee's funding is materially reduced or eliminated at any time during the lease term. Lessor shall have no recourse in the event of such termination. "Materially reduced" means that as a consequence of the reduction of the sum of all grants received by the Lessee, it may not continue to conduct its operations as it currently does, as for example, by requiring a material reduction in employees or office space required for its operations. B) Lessee’s existence is subject to legislative acts and appropriations from the federal and state of Florida governments. C) All of the Lessee's assets are owned by the government agencies. Accordingly, the Lessor shall have no right to claim or write off attachment of any such asset, notwithstanding any provisions of this lease agreement to the contrary. D) In the event of a material reduction in the Lessee's funding of which the Lessee has given notice to the Lessor before the lease, the Lessee shall use its good faith efforts with the Lessor to amend the Lease so that the less area is leased and the lease may then not be terminated. If the Lessor and Lessee are unable to reach an agreement, the Lease shall be terminated effective 60 days after the Lessee's initial notice.

Confidentiality:

Landlord and Tenant, including their respective agents and representatives expressly recognize that the terms of this letter, any subsequent proposals and the lease are confidential, and that they are not authorized to publicly announce any information regarding a lease or the potential finalization of a lease unless Landlord and Tenant have authorized such information to be released.

Contingency:

Neither this letter, any subsequent proposal, or any discussion between Tenant, Landlord or their respective agents, consultants, or attorneys, nor the exchange or preparation of any papers or memoranda will be deemed to constitute a final, binding or agreement. Any such final binding agreement is expressly conditioned upon the execution and delivery by Tenant and Landlord of a formal, written definitive lease agreement and either party shall be free to discontinue negotiations at any time without cause and/or simultaneously conduct negotiations with landlords of alternate locations, without any obligations or liability whatsoever.

On behalf of our client, thank you in advance for your detailed and prompt response. If you have any questions or comments, please call us at your earliest convenience.

Sincerely,

Alex Adorno
Sr. Investment Specialist
The Keyes Company

Confirmed and Agreed:

Tenant:

Brian K. Bauer

Oct 03 2023

Date: _____

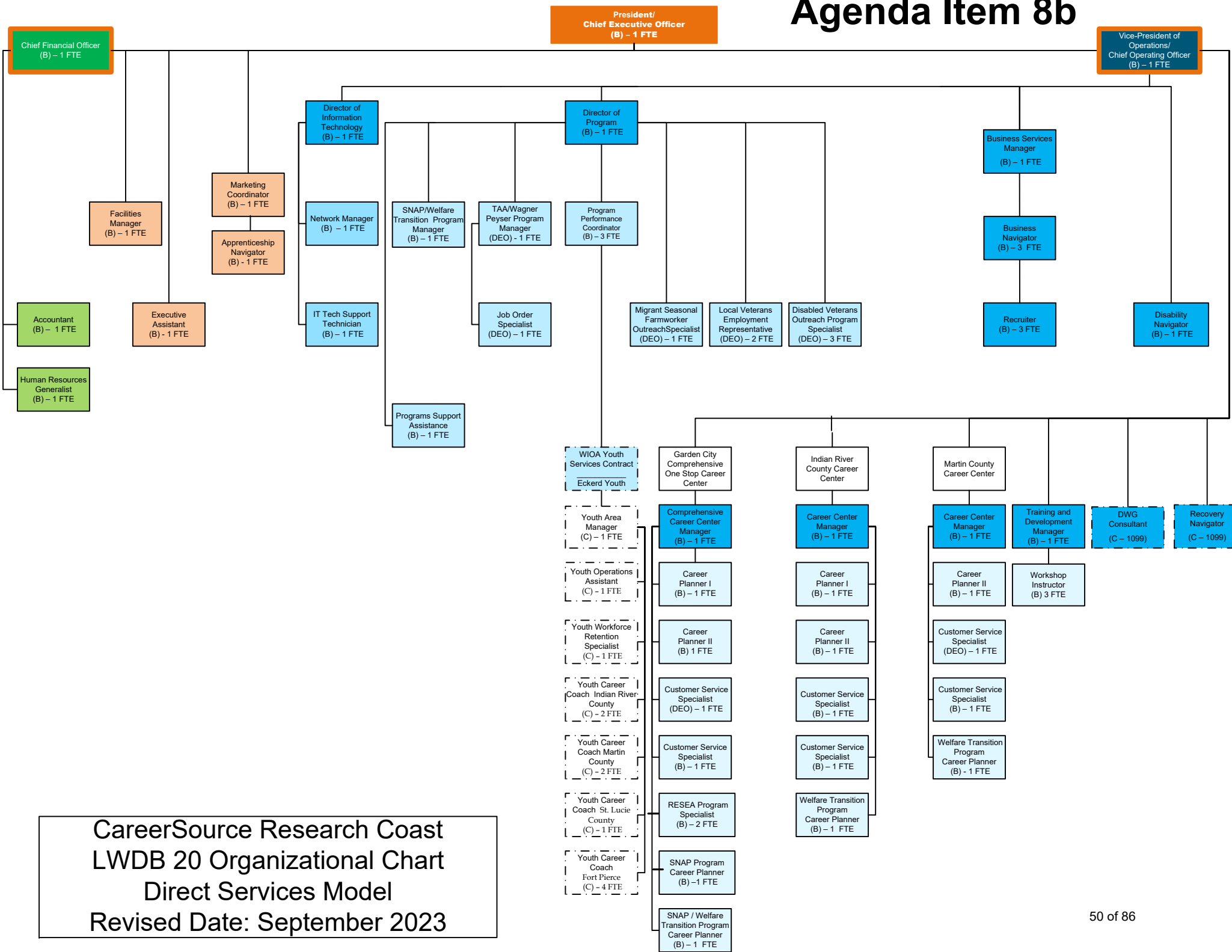
Name: Brian Bauer
Title: President/CEO/ Worldwide Screen Solutions, Inc

Landlord:

Date: _____

Name:
Title:

Agenda Item 8b



CareerSource Research Coast
 LWDB 20 Organizational Chart
 Direct Services Model
 Revised Date: September 2023

Agenda Item 8c

AGENDA ITEM SUMMARY

Title	CareerSource research Coast Succession Plan
Strategic Plans/Goals	Administrative & Strategic Planning
Policy/Plan/Law	Board By-Laws
Action Requested	Review Succession Plan
Background	<p>Succession planning is a process of systematically and deliberately preparing for future changes of leadership in key positions. The process may identify potential replacements and provide strategies for developing and/or hiring individuals to meet future needs. The plan serves as a guideline for addressing changes in key leadership. Key positions are the President/CEO, Vice President of Operations/COO, Chief Financial Officer/CFO, Director of Programs, Director of Information Technology, Career Center Managers, Business Services and Program Managers. These positions may be filled from within by promoting employees who were adequately prepared to assume the duties of the higher position.</p>
Staff Recommendation	Review and discuss the current Succession Plan to ensure that as individuals in key positions leave the company, someone will be able to perform his/her duties until a replacement is hired.
Supporting Material	CareerSource Research Coast Succession Plan - July 2019
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

AGENDA ITEM SUMMARY

Title	CareerSource Florida Board of Directors Approved Policies
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's
Action Requested	Review CareerSource Florida Board of Directors Approved Policies
Background	<p>On Sept. 19, 2023, the CareerSource Florida Board of Directors approved the following policies:</p> <ul style="list-style-type: none"> • CareerSource Florida Regional Planning Area Strategic Policy operationalizes one of the three pillars of the Florida Workforce System Transformation Plan in accordance with the REACH Act. This Strategic Policy defines the goals and requirements for Florida's Regional Planning Areas to promote workforce system alignment with education and economic development and optimize regional growth opportunities. • CareerSource Florida Education and Industry Consortium Strategic Policy, by Senate Bill 240, requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area. The Strategic Policy defines the requirements for consortium membership and quarterly reporting. • CareerSource Florida Eligibly Training Providers List Administrative Policy was revised to implement a critical system-wide improvement included in the Florida Workforce System Transformation Plan and describes the state policy on enforcement of Eligible Training Providers, including denials, deactivation, removal, loss of eligibility, re-application, and the appeals process for local workforce development boards and providers.
Staff Recommendations	Review CareerSource Florida Board of Directors Approved Policies
Supporting Material	CareerSource Florida Regional Planning Area Strategic Policy, CareerSource Florida Education and Industry Consortium Strategic Policy, CareerSource Florida Eligibly Training Providers List Administrative Policy
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473</p>

Approved _____
Disapproved _____

Action Item 1

CAREERSOURCE FLORIDA STRATEGIC POLICY REGIONAL PLANNING AREAS

Public Law 113 – 128, The Workforce Innovation and Opportunity Act (WIOA), requires the state workforce development board to assist the Governor in developing, implementing and modifying a State Workforce Development Plan. Florida’s WIOA State Plan describes Florida’s strategy for supporting the publicly funded workforce system. WIOA Section 106 describes the process by which the Governor designates local workforce development areas within the state. Local areas are designated consistent with labor market areas in the state; are consistent with regional economic development areas in the state; and have available the federal and non-federal resources necessary to effectively administer WIOA activities including whether the areas have the appropriate education and training providers such as institutions of higher education and career and technical education schools.

The Reimagining Education and Career Help (REACH) Act was signed into law in June 2021. The REACH Act addresses the evolving needs of Florida’s economy by increasing the level of collaboration and cooperation among state businesses and education communities while improving training within and access to a more integrated workforce and education system for all Floridians. The law takes an integrated, collaborative approach to strengthen partnerships and enhance access to education, training and employment opportunities within and across key workforce, education and support services systems that are the backbone of Florida’s comprehensive workforce development ecosystem.

In December 2021, the CareerSource Florida Board of Directors approved CareerSource Florida Policy 2021.12.09.A.1 – Comprehensive Employment, Education and Training Strategy. This strategic policy encourages local workforce development boards to use all allowable resources and to collaborate with all partners to develop innovative strategies that create simplified access to and provide excellent customer service for Florida’s workforce; focus on continuous improvement, strengthen partnerships to leverage shared resources and eliminate duplication of services; align programs and resources to meet local market demand in occupations that lead to self-sustaining jobs; and, implement data-driven accountability measures and quantifiable outcomes related to training programs, employment and services to Florida businesses.

The REACH Act amended Chapter 445, Florida Statutes. One key change introduced by the REACH Act was the creation of Section 445.006(4), Florida Statutes, which authorized FloridaCommerce to prepare a federal waiver to be submitted by the Governor to the U.S. Department of Labor that allows the CareerSource Florida Board of Directors to fulfill the roles

and responsibilities of local workforce development boards or reduce the number of local workforce development boards based on population size and commuting patterns in order to:

- Eliminate multiple layers of administrative entities to improve coordination of the workforce development system.
- Establish consistent eligibility standards across the state to improve the accountability of workforce-related programs.
- Provide greater flexibility in the allocation of resources to maximize the funds directed to training and business services.

Revisions to the REACH Act in Senate Bill 240, signed into law by the Governor on May 15, 2023, further require Regional Planning Areas to establish administrative cost arrangements.

On Feb. 23, 2023, the CareerSource Florida Board of Directors approved the Florida Workforce System Transformation Plan, a three-pillar plan for accomplishing the REACH Act charge to reduce the number of local workforce development boards while allowing the CareerSource Florida network to modernize and better position the system to be more customer-centered, cost effective and responsive to meet workforce talent demands. The plan focuses on:

- Alignment and consolidation for local workforce development boards.
- System-wide improvements for improved customer consistency and better leveraging of public funds.
- Regional planning to further promote workforce system alignment with education and economic development and optimize opportunities for regional growth.

This Regional Planning Area Strategic Policy defines the goals for Regional Planning Areas to include but not be limited to:

- Aligning workforce strategies to address the needs of shared industry sectors, employers, and significant populations of job seekers.
- Addressing common labor shortages and worker skill gaps with aligned service strategies.
- Realizing system efficiencies through reducing resource costs (monetary, time, or other).

Additionally, the policy defines the requirements for Regional Planning Areas in Florida.

FOR CONSIDERATION

- **Approve CareerSource Florida Strategic Policy – Regional Planning Areas, implementing the requirements for Regional Planning Areas.**



Strategic Policy

Title:	Regional Planning Areas Strategic Policy
Adopted:	
Effective:	

I. PURPOSE AND SCOPE

A Regional Planning Area is made up of two or more local workforce development areas to improve workforce system alignment within larger economic development areas to support economic mobility, growth and prosperity.

The intended goals of establishing Regional Planning Areas across neighboring local workforce development areas include but are not limited to:

- Aligning workforce strategies to address the needs of shared industry sectors, employers and significant populations of job seekers.
- Addressing common labor shortages and worker skills gaps with aligned service strategies.
- Realizing system efficiencies through reducing resource costs (monetary, time or other).

Beyond establishing formal Regional Planning Areas as defined in this policy, local workforce development areas are encouraged to engage in other partnership opportunities with the broader CareerSource Florida network that achieves these goals.

II. BACKGROUND

Public Law 113 – 128, The Workforce Innovation and Opportunity Act (WIOA), requires the state workforce development board to assist the Governor in developing, implementing and modifying a State Workforce Development Plan. Florida’s WIOA State Plan describes Florida’s strategy for supporting the publicly funded workforce system. WIOA Section 106 describes the process by which the Governor designates local workforce development areas within the state. Local areas are designated consistent with labor market areas in the state;

are consistent with regional economic development areas in the state; and have available the federal and non-federal resources necessary to effectively administer WIOA activities including whether the areas have the appropriate education and training providers such as institutions of higher education and area career and technical education schools.

The Reimagining Education and Career Help (REACH) Act was signed into law in June 2021. The REACH Act addresses the evolving needs of Florida's economy by increasing the level of collaboration and cooperation among state businesses and education communities while improving training within and access to a more integrated workforce and education system for all Floridians. The law takes an integrated, collaborative approach to strengthen partnerships and enhance access to education, training and employment opportunities within and across key workforce, education and support services systems that are the backbone of Florida's comprehensive workforce development ecosystem.

In December 2021, the CareerSource Florida Board of Directors approved CareerSource Florida Policy 2021.12.09.A.1 – Comprehensive Employment, Education and Training Strategy. This strategic policy encourages local workforce development boards to use all allowable resources and to collaborate with all partners to develop innovative strategies that create simplified access to Florida's workforce system and provide excellent customer service for Florida's job seekers and businesses; focus on continuous improvement, strengthen partnerships to leverage shared resources and eliminate duplication of services; align programs and resources to meet local market demand in occupations that lead to self-sustaining jobs; and, implement data-driven accountability measures and quantifiable outcomes related to training programs, employment and services to Florida businesses.

On Feb. 23, 2023, the CareerSource Florida Board of Directors approved the Florida Workforce System Transformation Plan, a three-pillar plan directing the CareerSource Florida network to modernize the local workforce development board governance structure in the nation's third-largest state and better position the system to be more customer-centered, cost effective and responsive to meet workforce talent demands. The plan focuses on:

- Alignment and consolidation for local workforce development boards.
- System-wide improvements for improved customer consistency and better leveraging of public funds; and
- Regional planning to further promote workforce system alignment with education and economic development and optimize opportunities for regional growth.

The Governor subsequently affirmed the CareerSource Florida Board of Directors' recommendation to realign and consolidate local workforce development areas as outlined in the Florida Workforce System Transformation Plan.

III. POLICIES AND PROCEDURES

The Florida Workforce System Transformation Plan directs the CareerSource Florida network to establish Regional Planning Areas. The requirements for Regional Planning Areas in this policy are established by WIOA, Florida law, and actions by the CareerSource Florida Board of Directors.

CareerSource Florida, in collaboration with the Governor's REACH Office, FloridaCommerce and local workforce development boards, shall develop recommendations to the Governor and state workforce development board for the designation of Regional Planning Areas for the state. Local workforce development boards may request designation as a Regional Planning Area by submitting the request and supporting documentation to the state workforce development board for consideration.

The state, after consultation with local workforce development boards and chief local elected officials for the Regional Planning Area, shall require the local workforce development boards and chief local elected officials within a planning region to include the shared Regional Planning Area objectives, activities, and performance elements as a regional addendum to each local workforce development board's WIOA local plan. The state shall provide technical assistance and labor market data, as requested by local areas, to assist with such regional planning and subsequent service delivery efforts.

Regional Planning Area and local WIOA plans must align with Florida's WIOA Statewide Plan.

Requirements for Regional Planning Areas:

- Each local workforce development area must be part of a Regional Planning Area.
- Regional Planning Areas must include, at a minimum, two contiguous local workforce development areas within Florida.
- Regional Planning Areas shall have relevant relationships as evidenced by population centers, commuting patterns, industrial composition, location quotients, labor force conditions and geographic boundaries.
- Regional Planning Areas shall establish a shared regional service strategy with a defined goal.
- Regional planning areas shall establish administrative cost arrangements across local workforce development areas. Acceptable examples of administrative cost arrangements include but are not limited to shared staff, technology systems, or back-end administrative support tools.
- Chief Local Elected Officials in a new regional planning area **MUST** participate in the regional planning process that results in the inclusion of the shared regional objectives and initiatives as an addendum to each local workforce development board's WIOA plan.
- The regional plan must include a description of activities that result in the following items:
 - Establishment of regional service strategies using cooperative service delivery agreements that include but are not limited to:
 - Consistent eligibility standards and enrollment processes.
 - Common training and coordination of supportive service offerings.
 - Common technology tools and sharing of data within tools outside of Employ Florida.
 - Development and implementation of sector strategies for in-demand sectors or occupations.

- Collection and analysis of regional labor market data.
- Coordination of supportive services.
- Coordination of services with regional economic development services and providers.
- Establishment of agreement concerning how the regional planning area will collectively negotiate performance for the local workforce development areas or the planning region.

IV. AUTHORITIES

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

[Chapter 445.003 – 445.007, Florida Statutes](#)

[Chapter 2021-164, Laws of Florida, The Reimagining Education and Career Help Act](#)

[CareerSource Florida Strategic Policy 2000.08.15.I.8D -- Certification of Local Workforce Development Boards](#)

[CareerSource Florida Strategic Policy 2020.02.20.A.1 – Board Governance and Leadership](#)

[CareerSource Florida Administrative Policy 094 – Local Workforce Development Area Designation](#)

[Consolidated Action Item – Reimagining Florida’s Workforce System](#)

V. RESOURCES

[Reimagining Florida’s Workforce System: A Three-Pillar Plan for Transformation](#)

[Future State Options Report](#)

[Background Research and Analysis Report](#)

Approved _____
Disapproved _____

Action Item 2

CAREERSOURCE FLORIDA STRATEGIC POLICY EDUCATION AND INDUSTRY CONSORTIUMS

Signed into law May 15, 2023, Senate Bill 240, an act relating to education, amended Section 445.007, Florida Statutes, requiring each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area.

CareerSource Florida surveyed local workforce development boards and education institutions to determine what ongoing activities existed and obtain information and recommendations from local education and industry stakeholders about the availability of education, employment and training opportunities available to businesses and job seekers in local workforce development areas.

A workgroup was convened to develop a collaborative strategic policy that meets statutory requirements of Senate Bill 240 and aligns all relevant federal, state and local laws and policies. The workgroup, which included stakeholders from education, business, state government and local workforce development boards, met six times and made recommendations informing the strategic policy elements listed below.

This policy requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area. The chair of the local workforce development board shall appoint the consortium members from a list of criteria described in the policy.

Local education and industry consortiums will meet quarterly to discuss both the needs of local businesses and the associated educational offerings in the local areas. The consortium will provide a quarterly report to the local workforce development board to inform the local board on programs, services and partnerships in the service delivery area.

Local education and industry consortium reports will be published on local workforce development board websites and made available to the public.

The policy defines the requirements for consortium membership and quarterly reporting.

FOR CONSIDERATION

- **Approve CareerSource Florida Strategic Policy – Education and Industry Consortiums, implementing the requirements established in Senate Bill 240, signed into law May 15, 2023.**



Title:	Education and Industry Consortiums
Adopted:	
Effective:	

I. PURPOSE AND SCOPE

Section 445.007(15), Florida Statutes, requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated workforce service delivery area.

This policy requires local workforce development boards to appoint education and industry consortiums composed of local leaders who provide independent information from stakeholders in their local area. Local workforce development boards shall consider this information in creating strategies and local plans that describe efforts to provide educational and workforce opportunities to businesses and job seekers. The goal is to align educational programming with industry needs at the local level.

This policy applies to local education and industry consortiums and the local workforce development boards that appoint them. Education and industry consortiums act as independent advisory groups. Members do not have any direct or implied authority over local workforce development boards, their membership or employees.

II. BACKGROUND

Signed into law May 15, 2023, Senate Bill 240, an act relating to education, amended section 445.007(15), Florida Statutes, requiring each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area.

CareerSource Florida surveyed local workforce development boards and education institutions to determine what ongoing activities existed and obtain information and recommendations from local education and industry stakeholders about the availability of education, employment and

training opportunities available to businesses and job seekers in local workforce development areas.

A workgroup was convened to develop a collaborative strategic policy that meets statutory requirements of Senate Bill 240 and aligns all relevant federal, state and local laws and policies. The goal for these consortia is for the local workforce development board to obtain local community-based information related to educational programs and industry needs and provide that information to local workforce development boards to inform programs, services and partnerships in the service delivery area. This approach ensures local workforce development boards are informed about the current workforce and talent needs of their targeted industries and existing educational and training offerings. This approach also affords businesses the opportunity to closely collaborate with workforce and education stakeholders to eliminate barriers and identify innovative talent pipeline opportunities like work-based learning experiences, internships, preapprenticeship, registered apprenticeship, on-the-job training, customized training, Incumbent Worker Training and other training opportunities.

The workgroup, which included stakeholders from education, business, state government and local workforce development boards, met six times and made recommendations informing the strategic policy elements listed below.

III. POLICY

Required Membership

Each local workforce development board shall create an education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area. The chair of the local workforce development board shall appoint the consortium members. A member of a local workforce development board shall not serve as a member of the consortium. Consortium members shall be appointed for two-year terms beginning on Jan. 1 of the year of the appointment, and any vacancy on the consortium must be filled for the remainder of the unexpired term in the same manner as the original appointment.

The membership of the education and industry consortium must meet the following requirements:

Industry Representative Requirements:

- Chief Executive Officers or presidents or other executive level staff from the top public and private employers in the local area.
- Industry representatives should reflect the priority industries in the local area.

Education Representative Requirements:

- Superintendents, presidents, or other leadership staff from education institutions in the local area that represent both public and private education entities in:
 - K-12 education
 - District Technical Colleges
 - State Colleges
 - Universities
 - Other degree or credential granting institutions in the local area

If a member of the education and industry consortium is unable to attend a meeting, a designee from the members' executive team may attend.

Meetings

Each education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area must meet at least quarterly. The local workforce development board will ensure that administrative support is provided to the consortium as needed and will be specifically responsible for the following:

- Maintaining a roster of consortium members and posting the current roster on the local workforce development board website.
- Posting scheduled consortium meetings on the local workforce development board website.
- Posting the quarterly reports from each meeting on the local workforce development website.

It is not required that consortium meetings be separately conducted from existing, similar meetings in the local area. Consortium meetings' discussions need only focus on the local labor market needs including:

1. Industry representatives sharing their specific talent development needs or observations on talent in the local area.
2. Education representatives sharing what specific education offerings are available in the local area.

Reports

Education and industry consortiums in each local area shall provide quarterly reports to the applicable local workforce development board (and locally designated areas) which provide community-based information related to educational programs and industry needs to inform the local workforce development board on programs, services, and partnerships in the service delivery area.

Quarterly reports shall include:

- A record of the consortium members in attendance.
- A summary analysis of the local labor market based on industry representative needs and education offerings.
- Information on priority industry sectors and occupations for the local area.
- Information on the status of existing talent pipelines for in-demand occupations and the need to expand or leverage existing and/or new resources.

Local workforce development boards are encouraged to consider information obtained from the education and industry consortium to determine effective ways to grow, retain and attract talent to the service delivery area.

As noted above, quarterly education and industry consortium reports shall be published on the local workforce development board's website. Links to education and industry consortium reports and rosters shall be included in each local workforce development board's Workforce Innovation and Opportunity Act local plan.

IV. AUTHORITY

[Public Law 113-128, Workforce Innovation and Opportunity Act \(2014\)](#)

[Chapter 445.004, Florida Statutes](#)

[Chapter 445.007, Florida Statutes](#)

V. ATTACHMENTS

Consortium Member Appointment Letter Template

Consortium Roster Matrix Template

Quarterly Report Template

Board Logo

Board Chair

*President & CEO/
Executive Director*

[Date]

[Appointee name]

[Position]

[Organization]

[Address]

Dear [appointee name]:

Thank you for volunteering to serve on the [name of education and industry consortium].

Section 445.007, Florida Statutes, requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated workforce service delivery area. Local consortiums are required to meet quarterly and provide reports to the local workforce development board that includes community-based information related to educational programs and industry needs. Consortium reports inform the local workforce development board and staff on programs, services and partnerships in the service delivery area.

The relationship between industry and education is vital to the state and local workforce development system. I am confident your representation on this consortium will enhance communication and help ensure the local workforce development board has access to independent and actionable information to enhance workforce opportunities to businesses and job seekers in our local area.

Information about the role of education and industry consortiums is available in the statewide strategic policy [insert link].

Your appointment to the consortium is effective [Jan. 1 or other date if interim appointment is made] and concludes on Dec. 31, [2025]. Thank you again for offering your time, talent and energy to this important initiative. If you have any questions, please do not hesitate to contact [insert local contact].

Sincerely,

[Name]

[Chair]

[Local workforce development board]

cc: [President/CEO, local workforce development board]
[Senior staff responsible for maintaining consortium rosters]

[Add LWDB Footer]

[Local Workforce Development Board] [NAME OF EDUCATION AND INDUSTRY CONSORTIUM] ROSTER

GENERAL INFORMATION

Section 445.007 (15), Florida Statutes, requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated workforce service delivery area.

The chair of the local workforce development board shall appoint the consortium members. A member of a local workforce development board shall not serve as a member of the consortium. Consortium members shall be appointed for two-year terms beginning on Jan. 1 of the year of the appointment, and any vacancy on the consortium must be filled for the remainder of the unexpired term in the same manner as the original appointment.

The membership of the education and industry consortium must meet the following requirements:

Industry Representative Requirements:

- Chief Executive Officers or presidents or other executive level staff from the top public and private employers in the local area.
- Industry representatives should reflect the priority industries in the local area.

Education Representative Requirements:

- Superintendents, presidents, or other leadership staff from education institutions in the local area that represent both public and private education entities in:
 - K-12 education
 - District technical colleges
 - State colleges
 - Universities
 - Other degree or credential granting institutions in the local area

If a member of the education and industry consortium is unable to attend a meeting, a designee from the members' executive team may attend.

Chair of consortium: _____

Contact information: _____

Report prepared by: _____

Board contact: _____

Date: _____

CONSORTIUM ROSTER

NAME	TITLE	ORGANIZATION NAME	INDUSTRY (For Business Partners Only)	PHONE NUMBER	EMAIL ADDRESS	TERM START DATE	TERM END DATE	CONSORTIUM SEAT FILLED

NAME	TITLE	ORGANIZATION NAME	INDUSTRY (For Business Partners Only)	PHONE NUMBER	EMAIL ADDRESS	TERM START DATE	TERM END DATE	CONSORTIUM SEAT FILLED

[Local Workforce Development Board] [Name of EDUCATION AND INDUSTRY CONSORTIUM] QUARTERLY REPORT

A. GENERAL INFORMATION

Report quarter: _____

Date of meeting: _____

Report prepared by: _____

Local workforce development board contact: _____ Date: _____

B. ATTENDANCE

Name	Organization	Industry or Education Organization	Contact Information

B. SUMMARY REPORT

1. Summary analysis of the local labor market based on the industry representative needs and education offerings. (Provide summary)
2. Information on priority industry sectors and occupations for the local area. (Provide summary)
3. Information on the status of existing talent pipelines for in-demand occupations. (Provide summary)

Approved _____
Disapproved _____

Action Item 3

CAREERSOURCE FLORIDA ADMINISTRATIVE POLICY – ELIGIBLE TRAINING PROVIDERS LIST

Public Law 113-128, the Workforce Innovation and Opportunity Act (WIOA), Section 122, requires the Governor, through the state workforce development board, to establish criteria, information requirements and procedures to determine the eligibility of providers of training services in the state. The workforce development system established under WIOA emphasizes informed consumer choices, job-driven training, provider performance and continuous improvement.

The Reimagining Education and Career Help (REACH) Act charges FloridaCommerce with establishing WIOA eligible training provider criteria focused on participant outcomes. The quality and selection of providers and training services programs is vital to achieving these core principles.

The CareerSource Florida Administrative Policy 090 – WIOA Eligible Training Providers List provides guidance to local workforce development boards about the Eligible Training Providers List and related federal and state requirements, performance standards, data reporting, and procedures for determining initial and continued eligibility of training providers, including in-state and out-of-local-area and out-of-state providers and programs of study.

This policy describes the state policy on enforcement of Eligible Training Providers including denials, deactivation, removal, loss of eligibility, re-application, and the appeals process for local workforce development boards and providers.

This policy is being revised to conform to requirements established by the U.S. Department of Labor, the REACH Act, and to implement a critical system-wide improvement as part of the Florida Workforce System Transformation Plan approved by the CareerSource Florida Board of Directors in February 2023.

FOR CONSIDERATION

- **Approve revisions to CareerSource Florida Administrative Policy 090 – Eligible Training Providers List.**



**POLICY
NUMBER
090**

Administrative Policy

Title:	Eligible Training Providers List Requirements		
Program:	Workforce Innovation and Opportunity Act		
Effective:	3/1/2016	Revised:	TBD

I. PURPOSE AND SCOPE

The purpose of this policy is to provide guidance to local workforce development boards (LWDBs) on the Eligible Training Provider List (ETPL) and related federal and state requirements, performance standards, data reporting, and procedures for determining initial and continued eligibility of training providers and programs of study.

II. BACKGROUND

Workforce Innovation and Opportunity Act (WIOA) Title I training can be provided through a variety of contract mechanisms, or it may be funded through an Individual Training Account (ITA) that is used to purchase training from an Eligible Training Provider (ETP). ETPs are postsecondary providers of training services that are eligible to receive funds from LWDBs as prescribed in Section 133(b) of WIOA. The ETPL is mandated by Section 122 of WIOA, which requires the Governor, through the state workforce development board, CareerSource Florida, Inc., to establish criteria, information requirements, and procedures on the eligibility of training providers of training services in the state. Additionally, Florida's 2021 Reimagining Education and Career Help (REACH) Act charges the Florida Department of Commerce (FloridaCommerce) with establishing ETP criteria focused on participant outcomes.

The workforce development system established under WIOA emphasizes informed consumer choices, job-driven training, provider performance, and continuous improvement. The quality and selection of training providers and programs of study are vital to achieving these core principles.

III. AUTHORITY

Workforce Innovation and Opportunity Act of 2014, Public Law 113-128

20 Code of Federal Regulations (CFR) 680.400 et seq., Subpart D – Eligible Training Providers

Training and Employment Guidance Letter (TEGL) No. 8-19 and TEGL No. 8-19, Change 1

TEGL No. 13-16

TEGL No. 3-18

TEGL No. 21-22

Section 445.003(7)(b), Florida Statutes (F.S.)

Section 445.004(4)(h), F.S.

Section 1005.21, F.S.

Section 1008.39, F.S.

IV. POLICIES AND PROCEDURES

An ITA may be used to pay for any allowable type of training if the program of training services (also referred to as a “program of study”) is on the ETPL. ETPs are entities that are eligible to receive WIOA Title I-B funds for adult and dislocated worker participants who enroll in training programs, through ITAs. ITAs may also be used for WIOA Title I Youth funds to provide training to older, out-of-school youth, ages 18-24, and in-school youth, ages 16-21.

WIOA requires that each state ensure qualified providers offering a variety of job-driven training programs are available. A training provider must provide a program of study to be included on the ETPL.

A. STATE AND LOCAL ETPL

FloridaCommerce and the LWDBs must work together to identify ETPs to be included on the state ETPL. LWDBs must select approved training providers from the state ETPL. In addition to the criteria outlined in this policy, LWDBs may add additional requirements for training providers, except registered apprenticeship programs (RAPs), that supplement the criteria and information requirements for an ETP or program of study. This will result in training providers that are on the state

ETPL that may not be eligible for inclusion on the local ETPL; therefore, the local ETPL will be a subset of the state ETPL. LWDBs that do not establish additional requirements through local policy must include all state ETPs on its local ETPL. Note: All ETPs on a local ETPL must first be on the state ETPL.

State and local ETPLs must be maintained in the state's online labor exchange and case management system, Employ Florida. Also, LWDBs must make the state ETPL or their local ETPL, as appropriate, publicly available through their local websites.

B. PROVIDER AND PROGRAM ELIGIBILITY UNDER WIOA

To be eligible to apply for inclusion on the ETPL and to receive training funds under WIOA Section 133(b), the training provider must be one of the following types of entities detailed in 20 CFR 680.410(d):

1. Institutions of higher education such as universities, colleges, or other public or private institutions of higher education that provide programs that lead to a recognized postsecondary credential.
2. RAPs.
3. Other public or private training providers, which may include community-based organizations and joint labor-management organizations.
4. Eligible providers of adult education and literacy activities under WIOA Title II, if these activities are provided in combination with training services as described in 20 CFR 680.350.

Additionally, LWDBs may be included on the ETPL if they meet the conditions of WIOA Section 107(g)(1), which states that authority may be permitted to LWDBs to provide training services pursuant to a request from the LWDB if the local board:

1. Submits a request or an application to FloridaCommerce for approval by the CareerSource Florida Board of Directors, which must include:
 - a. Satisfactory evidence that there is an insufficient number of eligible providers of such a program of training services to meet local demand in the local area;
 - b. Information demonstrating that the LWDB meets the requirements for an eligible provider of training services under WIOA Section 122; and
 - c. Information demonstrating that the program of training services prepares participants for an in-demand industry sector or occupation in the local area; and
2. Makes the proposed request or application available to eligible providers of training services and other interested members of the public for a public comment period of not less than 30 days.

C. PROGRAM OF STUDY

A program of study is a course, class, or structured regimen that provides training leading to:

1. An industry-recognized postsecondary credential, a secondary school diploma, or equivalent;
2. Employment; or
3. Measurable skills gains leading to one of the above.

Training services may be delivered in person, online, or using a blended method or approach. Online training providers may apply and be considered for inclusion on the state and local ETPLs but are required to meet the same eligibility and performance criteria established for classroom-based instruction providers. Training programs must also be made physically and programmatically accessible for individuals who are employed and individuals with barriers to employment, such as persons with disabilities.

ETPs may offer programs of study that include:

1. Occupational skills training including training for non-traditional employment;
2. On-the-Job Training (OJT);
3. Incumbent Worker Training (IWT);
4. Programs that combine workplace training with related instruction, which may include cooperative education programs;
5. Private-sector training programs;
6. Skill upgrading and retraining;
7. Entrepreneurial training;
8. Job readiness training provided in combination with training services or transitional jobs;
9. Adult education and literacy activities, including activities of English language acquisition and integrated education and training programs, provided concurrently or in combination with services provided in the programs listed in numbers 1. through 7., above; and
10. Customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training.

D. INITIAL ELIGIBILITY (TRAINING PROVIDERS)

Initial eligibility for the ETPL applies to all training providers except RAPs registered with the Florida Department of Education (DOE). The training provider must supply verifiable, program-specific performance information pursuant to the criteria established by federal regulations and state statutes under which the provider applies

to become an ETP. The information provided must support the training provider's ability to serve participants.

To meet initial eligibility to be included on the ETPL, a training provider must provide the following:

1. A description of the training or educational institution including the provider's address, email, Federal Employer Identification Number (FEIN), and the name of the contact person;
2. Verification the provider is licensed, certified and/or otherwise authorized under Florida law to provide training services (this applies to in-state and out-of-state providers);
3. A detailed description of each program of training services being submitted for initial eligibility determination;
4. Data supporting the cost of attendance (including, but not limited to, tuition and fees);
5. Verification that the program leads to a credential on the Master Credentials List (MCL) and information on any other associated MCL credentials which can be used as part of a sequence in an individual's career lattice;
6. Whether the provider has developed the training in partnership or collaboration with a business or industry (identifying the business or industry);
7. Identification of the in-demand industry sectors and occupations that best fit with the training program;
8. A description of prerequisites, skills, and knowledge required prior to the commencement of the training; and
9. Information related to WIOA performance indicators (employment, median earnings, credentials) other than measurable skills gains.

All eligibility determinations are made based on the review of required information, which must be submitted through the ETPL portal in Employ Florida, as outlined in **Section IV. I – ETPL Portal** of this policy.

Training providers seeking initial eligibility determinations should contact an LWDB in the local area or planning region in which they plan to operate. The LWDB will provide the training provider with guidance and assistance with the ETPL application process and requirements, as needed. The LWDB will review the application to ensure documentation requirements are met and notify the State ETPL Coordinator via email at ETPL@commerce.fl.gov that a determination of initial eligibility request has been submitted. When conducting a preliminary review of training provider applications, the LWDB must do so using only the state's criteria. The LWDB should not apply any additional local requirements or criteria during the preliminary review process.

The State ETPL Coordinator will approve or deny the application and notify the training provider of the determination through Employ Florida or the training provider's preferred mode of communication as indicated in the application. If approved, the ETP will be added to the state ETPL.

Alternatively, training providers may directly contact the State ETPL Coordinator at ETPL@commerce.fl.gov to request an initial eligibility determination. The State ETPL Coordinator will review the application to ensure that all documentation requirements are met. The State ETPL Coordinator will follow the aforementioned process for determining eligibility and providing notification to the training provider for approval or denial of the initial eligibility request.

Training providers and the programs of study that are approved will receive initial eligibility for one year and will be subject to the continued eligibility requirements subsequent to their initial eligibility period.

E. INITIAL ELIGIBILITY (PROGRAMS OF STUDY)

A training provider's request for an initial eligibility determination must be accompanied by a request for initial eligibility determination for at least one program of study. A training provider may request initial eligibility determinations for multiple programs of study, but each program of study is reviewed independently. When an ETP with continued eligibility for one or more programs of study requests that a new program of study be added to the ETPL, the new program of study will undergo an initial eligibility determination and may be approved or denied.

Training providers seeking initial eligibility for a program of study should contact an LWDB in the local area or planning region in which they plan to operate. The LWDB will provide the training provider with guidance and assistance with the ETPL application process and requirements, as needed. The LWDB will review the application to ensure documentation requirements are met and notify the State ETPL Coordinator via email at ETPL@commerce.fl.gov that a determination of initial eligibility request for a program of study has been submitted.

All eligibility determinations are made based on the review of required information, which must be submitted through the ETPL portal in Employ Florida, as outlined in **Section IV. I – ETPL Portal** of this policy. The State ETPL Coordinator will approve or deny the program application and notify the training provider of the determination(s) through Employ Florida or the preferred mode of communication indicated in the application for initial eligibility.

Alternatively, training providers may directly contact the State ETPL Coordinator at ETPL@commerce.fl.gov to request an initial eligibility determination for one or more programs of study. The State ETPL Coordinator will review the application to ensure that all documentation requirements are met. The State ETPL Coordinator will follow

the aforementioned process for determining eligibility and providing notification to the training provider for approval or denial of the initial eligibility request.

F. CONTINUED/SUBSEQUENT ELIGIBILITY

After a training provider has completed the one-year initial eligibility period, the training provider is required to apply for continued eligibility and recertify their program(s) of study every two years to maintain their eligibility for the ETPL. This process requires submission of performance and cost information for each program of study listed on the state ETPL.

Applications for continued eligibility must be submitted three months prior to the end of their current eligibility period. Training providers applying for continued eligibility of programs of study must log in to the ETPL portal to review and update all required fields and forms for each program of study for which continued eligibility is being sought. If the LWDB is assisting the training provider with their subsequent eligibility, the LWDB will review the program application to ensure all documentation requirements are met and notify the State ETPL Coordinator that a continuing eligibility request has been submitted for the program(s) of study. The State ETPL Coordinator will review all information provided and notify the LWDB and the provider of approval or denial through Employ Florida or the preferred mode of communication outlined in the application.

Each training provider seeking continued eligibility must supply the following information as required by 20 CFR 680.410:

1. Verification the provider is licensed, certified, or otherwise authorized under Florida law (if applicable) to be a provider of training services. This requirement applies to in-state and out-of-state providers.
2. Information reported to state agencies on federal and state training programs other than WIOA Title I-B programs as listed below:
 - a. The total number of persons enrolled in the program;
 - b. The total number of WIOA participants enrolled in the program;
 - c. The total number of persons completing the program;
 - d. The total number of WIOA participants completing the program;
 - e. Quality¹ of the program of study including a program that leads to a recognized postsecondary credential;
 - f. Provider's ability to offer industry-recognized certificates and credentials;
 - g. The total number of persons awarded a Recognized Postsecondary Credential (or other credential, if applicable);

¹ Florida defines quality as training programs that meet the minimum criteria as defined in this policy as well as programs that develop skills valued by priority industry sectors.

- h. The total number of WIOA participants awarded a Recognized Postsecondary Credential (or other credential, if applicable);
- i. The total number of persons employed after completing the program;
- j. The total number of WIOA participants employed after completing the program;
- k. Data identifying the cost of attendance and costs of tuition and fees for WIOA participants completing the program;
- l. Information on recognized postsecondary credentials (or other credential, if applicable) received by WIOA participants;
- m. Whether the credential can be used in conjunction with other credentials as part of a sequence to move an individual along a career pathway or up a career ladder;
- n. Description of how the provider will ensure access to programs of study throughout the state, including in rural areas, and using technology (as applicable);
- o. Description of provider's ability to provide trainings that are physically and programmatically accessible for individuals who are employed and individuals with barriers to employment, including individuals with disabilities;
- p. Information reported to state agencies with respect to federal and state programs of study (other than the program carried out under WIOA), including one-stop partner programs;
- q. Performance on WIOA performance indicators;
- r. The degree to which programs of study relate to in-demand industry sectors and occupations in the state;
- s. Timeliness and accuracy of ETP's performance reports; and
- t. Any additional factors that are determined appropriate within the parameters of WIOA and statutes.

G. REGISTERED APPRENTICESHIP PROGRAMS

In accordance with the National Apprenticeship Act (NAA) (50 Stat. 664, chapter 663; 29 U.S.C. 50 et seq.), entities that carry out RAPs are exempt from the initial and continued eligibility requirements described in this policy. RAPs must be included and maintained on the ETPL until:

- 1. The RAP notifies FloridaCommerce it no longer wants to be included on the list;
- 2. The program becomes deregistered under the National Apprenticeship Act;
- 3. The program is determined to have intentionally supplied inaccurate information; or
- 4. A determination is made by FloridaCommerce that the RAP substantially violated any provision of Title I of WIOA or the WIOA regulations, including 29 CFR part 38.

Because RAPs are exempt from all initial and continued eligibility requirements, the LWDBs may not impose additional criteria or information requirements for RAP sponsors except as outlined in Training and Employment Guidance Letter Nos. 08-19 and 08-19, Change 1, and TEGE No. 13-16, Change 1.

A RAP is an ETP if it is registered with DOE, Office of Apprenticeship (OA), or any other state's State Apprenticeship Agency (SAA). Although they are automatically eligible for ETPL inclusion, RAP sponsors seeking to have their apprenticeship programs listed on the ETPL must still "opt-in" by informing the State ETPL Coordinator at ETPL@commerce.fl.gov. RAPs opting-in may be referred to the State ETPL Coordinator by CareerSource Florida, LWDBs, or DOE. If a RAP expresses interest in being on the state ETPL, the ETPL Coordinator must request the RAPs provide the following information:

1. Occupations included in the RAP;
2. The name and address of the RAP sponsor;
3. The name and address of the Related Technical Instruction provider and the location of instruction if different from the program sponsor's address;
4. The method and length of instruction; and
5. The number of active apprentices.

RAPs on the state ETPL must be included on all local ETPLs in the state and shall remain on the ETPLs until removed or upon written request for removal by the RAP sponsor to the ETPL Coordinator at ETPL@commerce.fl.gov.

FloridaCommerce will regularly coordinate with USDOL, CareerSource Florida and DOE to ensure that necessary updates are made to any information previously provided by RAP sponsors or training providers. FloridaCommerce will also coordinate with DOE to ensure that RAPs registered with the DOE are made aware that they are eligible for placement on the ETPL, and that DOE is informed when a RAP that is registered with USDOL's OA or another state's SAA contacts FloridaCommerce to opt-in to inclusion on the ETPL.

Apprenticeship programs that are not registered with DOE, OA, or another state's SAA are not considered RAPs and must complete the initial eligibility and continued eligibility procedures. Pre-apprenticeships, including quality registered pre-apprenticeships leading to RAPs, are not automatically approved for inclusion on the ETPL and are not exempt from requirements outlined in this policy. Other programs of training services offered by a RAP sponsor or a RAP's provider of related instruction are likewise not automatically eligible.

H. OUT-OF-LOCAL-AREA AND OUT-OF-STATE PROVIDERS

State policies and procedures may provide for reciprocal or other agreements established with another state to permit the use of ITAs for ETPs in another state. As

such, participants may choose ETPs and programs of study located outside of the state or local area if the program is on the state's ETPL and in accordance with state and local area policies.

Out-of-state postsecondary training institutions that are not operating in Florida are not required to be licensed by the Florida Commission for Independent Education (CIE). However, out-of-state providers must provide the following information:

1. Information needed for initial eligibility or continuing eligibility determination;
2. Evidence that the institution (and applicable programs) is accredited by an accreditation agency approved by the U.S. Department of Education;
3. Evidence that the institution meets the licensing requirements of its home state; and
4. Evidence that the institution is identified as active on the ETPL in its state of origin or native state. To provide performance information for its programs, out-of-state providers are required to report their student completer data to FloridaCommerce under established reporting mechanisms.

Out-of-local area and out-of-state training providers must request an initial eligibility determination for each program of study to be included on the state ETPL. Out-of-state providers must also provide documentation, uploaded to the ETPL portal, which validates the above-referenced criteria. These training providers must contact the state ETPL Coordinator directly to request their initial eligibility and the initial eligibility of their programs of study.

I. ETPL Portal

The state ETPL is managed by FloridaCommerce and maintained in Employ Florida, the state's online labor exchange and case management system. Employ Florida connects employers and job seekers and provides information about training opportunities available in the state, including training program services eligible for funding under WIOA Section 133(b).

The ETPL portal is the platform used to maintain ETPLs and record consumer information, including, but not limited to, cost and performance information for each approved program of study. The ETPL portal is the mechanism used by FloridaCommerce to manage the ETPL process, and by LWDBs and training providers to apply for initial eligibility and re-apply for continued eligibility.

The ETPL portal supports WIOA participants in making informed choices about ETPs and programs of study and allows FloridaCommerce to disseminate state and local ETPLs to employers, training providers, workforce staff, One-Stop career center partners, and the public, including individuals with disabilities and individuals with limited English proficiency. Consumer choice is ensured by making the state and

local ETPLs, accompanied by performance and cost information, widely available and easily accessible. ETPLs must be disseminated in a format that facilitates comparison between programs of study and is searchable, user-friendly, and easily understood by individuals seeking information on training outcomes.

J. PERFORMANCE CRITERIA

As required by Section 445.003(7)(b), F.S., FloridaCommerce must establish the minimum criteria a training provider must achieve for completion, earnings, and employment rates of eligible participants. Once criteria are established, training providers will be required to meet at least two of the minimum criteria for subsequent eligibility.

Like the RAP exemption from the eligibility requirements, RAPs also are exempt from ETP performance reporting requirements in WIOA Sections 116(d)(4) and 122, including any additional ETP reporting requirements that have been added by the state or local area.

K. ANNUAL REPORTING

No later than Aug. 31 of each year, training providers must upload information into the ETPL portal on all enrolled and completer individuals for each program of study being considered for continued eligibility. This student data must be submitted each year for each program of study and must include the social security numbers for each enrolled and completer individual to allow for the calculation of minimum performance levels as required in 20 CFR 680.460(g).

The ETPL portal provides a secure solution for the transmission of Personally Identifiable Information (PII). ETPs, excluding RAP sponsors, must upload student data including the social security numbers and completed training of all individuals enrolled during a specific timeframe as determined by policy. Any transmission of PII shall occur in accordance with FloridaCommerce security policies and any disclosure of PII from an education record must be carried out in accordance with the Family Education Rights and Privacy Act (FERPA), including provisions related to prior written consent. As allowed pursuant to 34 CFR 99.31, DOE has designated FloridaCommerce as an authorized representative to enforce or comply with federal legal requirements relating to WIOA.

L. DENIAL, DEACTIVATION, REMOVAL, OR LOSS OF PROVIDER OR PROGRAM ELIGIBILITY

There are circumstances under which training providers may be denied, deactivated, removed, or lose their eligibility for inclusion on the state ETPL, as outlined below. Prior to approving an ITA for a WIOA-eligible individual, LWDBs must ensure that

training providers and program of study are, or continue to be, included on the ETPL at the time the participant is enrolled in the program of study.

(1) Denial

A program of study that FloridaCommerce determines does not meet the eligibility requirements shall be issued a denial notice within 30 calendar days of FloridaCommerce's receipt of the application. A separate denial notice will be issued for each program of study being denied and will include the reason(s) for denial and provide appeal rights, as applicable.

(2) Deactivation

Once an ETP or program of study is approved, it will remain on the state's ETPL through the continued eligibility period of two years unless removed by FloridaCommerce for documented training provider and/or program of study violations. Training providers or programs of study are subject to deactivation and removal from the ETPL if:

1. FloridaCommerce determines the training provider intentionally supplied inaccurate information or substantially violated any provision of Title I of WIOA regulations, including 29 CFR Part 38;
2. The program of study fails to meet the states' minimum performance levels as required in 20 CFR 680.460(g); or
3. The training provider loses its license or accreditation from its accrediting body.

(3) Loss of Eligibility and Removal

A program of study may be removed from the state ETPL if:

1. The training provider fails to supply participant data required for the performance review by the annual due date of Aug. 31.
2. It is determined that the training provider intentionally supplied inaccurate information or substantially violated any provisions of Title I of WIOA or the WIOA regulations, including 29 CFR part 38.
3. It is determined that the provider is engaging in fraud or other criminal acts, incapacity, unfitness, neglect of duty, official incompetence, irresponsibility, misfeasance, malfeasance, gross mismanagement, waste, nonfeasance, or lack of performance.

FloridaCommerce will electronically send a notice of removal from the ETPL to the LWDBs and to the training provider. LWDBs must not issue a participant an ITA for a training provider/program of study that is determined to have lost eligibility for inclusion on the ETPL. If WIOA participants are already enrolled

and have received an ITA for a training provider/program of study that subsequently becomes deactivated or removed from the ETPL, LWDBs may allow enrolled participants to complete the training program; however, no new enrollments may occur. LWDBs must develop local operating procedures to ensure no enrollments are made after the effective date of the notice of removal. Procedures should also include how any existing participants who are enrolled in the program of study will be handled.

(4) Re-application

Training providers may reapply under the initial eligibility criteria provided in this policy.

M. APPEALS

For an appeal of any decision made at the state level, the appellant shall follow the appeals procedure established by FloridaCommerce. For an appeal of any decision made by an LWDB, the appellant shall follow the appeals procedure established in its local plan by the LWDB making the decision.

N. ETPL AND NON-ITA TRAINING SERVICES

There are exceptions to the required use of the ETPL for ITA-funded training by LWDBs. In the following situations covered by these exceptions, a contract for services between the LWDB and the training provider may be attained and implemented to ensure services are provided instead of selecting a training provider from the state ETPL.

(1) Work-Based Training

WIOA supports training and work experience for job seekers through work-based training, which is coordinated by LWDBs through collaboration with local employers. These activities, like OJT, Customized Training, and IWT do not require inclusion on the ETPL, in accordance with 20 CFR 680.530. Please see [Administrative Policy 100](#) for additional information on work-based training.

(2) Training Contracts

A program of study may be provided through training contracts instead of ITAs when there is not sufficient availability of eligible training providers in the local area to accomplish the purpose of an ITA. These contracts may be used for cohort training, per TEGL 21-22, Attachment 1, or in one of the other situations prescribed in 20 CFR 680.320. Because training contracts do not use ITAs, the training provider is not required to be included on the state or local ETPL. The LWDB must have written procedures in place that describe how such a

determination is made and the process for contracting with the training provider(s).

(3) Non-WIOA

The ETPL is a requirement of WIOA and only applies to programs that are supported by WIOA funding. Providers of training services that do not intend to seek WIOA funding do not need to request or pursue ETPL inclusion.

V. DEFINITIONS

- 1. Continued Eligibility:** “Continued Eligibility” or “Subsequent Eligibility” is the eligibility determination that allows training providers to remain on the ETPL until the next eligibility determination.
- 2. Credential:** A WIOA indicator consisting of a recognized postsecondary credential (an industry-recognized certificate or certification, a certificate of completion of an apprenticeship, a license recognized by the state involved or federal government, or an associate or baccalaureate degree) or a secondary school diploma, or its recognized equivalent, during participation in or within one year after exit from the program. All credentials must be included on the Master Credentials List and a credential’s inclusion on the Master Credentials List is sufficient to meet the WIOA definition of “credential.”
- 3. Eligible Training Provider (ETP):** A provider of training services or programs of study (as prescribed in 20 CFR 680.410) that has met the eligibility requirements to receive WIOA funds for providing training service programs to eligible individuals.
- 4. Eligible Training Provider List (ETPL):** A statewide or local compilation of ETPs (as prescribed in 20 CFR 680.410) and approved programs of training services or programs of study (as prescribed in 20 CFR 680.420).
- 5. Individual Training Account (ITA):** A payment agreement with an ETP established on behalf of a WIOA participant for a program of training services or programs of study as prescribed in WIOA section 134(c)(3).
- 6. Initial Eligibility:** The initial determination that allows a training provider and approved program of training services or programs of study onto the state or local ETPL for the first year. An established ETP may also request an initial eligibility determination for a new program of study.
- 7. Local ETPL:** A subset of the state ETPL created when LWDBs establish, through local policy, additional requirements for ETPs and programs of study. All ETPs on a local ETPL are also on the state ETPL, maintained in Employ Florida.

8. **Master Credentials List (MCL):** Required by the Reimagining Education and Career Help (REACH) Act, the Master Credentials List is a comprehensive list of state-approved degree and non-degree credentials of value that prepare Floridians for in-demand occupations. Credentials on the list satisfy the criteria set forth by the Florida Credentials Review Committee in the Framework of Quality. Programs of study must be on the MCL to be on the state ETPL.
9. **Personally Identifiable Information (PII):** Information used to distinguish or trace an individual’s identity, either alone or when combined with other personal or identifying information, linked or linkable to a specific individual.
10. **Program of Training Services:** A “Program of Training Services” or “Program of Study” as prescribed in 20 CFR 680.420. Such a program consists of one or more courses or classes, or a structured regimen, leading to one or more of the following: A recognized postsecondary credential, secondary school diploma or its equivalent; employment; or a measurable skills gain toward such a credential or employment.
11. **Registered Apprenticeship Program (RAP):** A program that is registered with the USDOL Office of Apprenticeship (OA) or any State Apprenticeship Agency (SSA) as prescribed in 20 CFR 680.470(a). Florida’s State Apprenticeship Agency is the Florida Department of Education’s Office of Apprenticeship.
12. **Sponsor (of a Registered Apprenticeship Program):** Any person, association, committee, or organization operating an apprenticeship program and in whose name the program is (or is to be) registered or approved.
13. **State ETPL:** A list of all Eligible Training Providers and Programs who have been approved to receive WIOA funding through ITAs. It is maintained by FloridaCommerce within the state’s ETPL MIS portal.
14. **Training Provider:** A university, college, public or private technical or vocational training institution, a private training company or private instructor, or a company employee who is qualified to provide instruction that leads to a recognized postsecondary credential, license, secondary school diploma or equivalent.

VI. REVISION HISTORY

Date	Description
3/1/2016	Policy issued by the Florida Department of Economic Opportunity.
TBD	Revised by FloridaCommerce to align with TEGL No. 08-19. Approved by the CareerSource Florida Board of Directors.