



Executive Committee Meeting

MEETING AGENDA

Meeting Details

Date: Friday, December 8, 2023

Time: 8:00 a.m.

Location: Administrative Office
584 NW University Blvd.
Suite 100
Port St. Lucie, FL 34698

MS Teams Virtual Meeting Access:

Access Code: 667 896 102#

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. Review and Approve Financial Reports for September and October - PY 2023-2024
4. Review and Approve Local Targeted Occupations List (LTOL) for 3rd Quarter - PY 2023-2024
5. Review and Approve Welfare Transition (WT) - Work Registration Policy Revisions
6. Executive Staff Holiday Bonuses

Other Business

7. Taylor, Hall, Miller, and Parker (THMP) Monitoring Review
8. President/CEO Performance Evaluation
9. CareerSource Florida Board of Directors
 - a. Letter Grade Update - Change in Methodology - PY 2023-2024
 - b. Regional Planning Area Update - Collaboration with CareerSource Palm Beach/Letter of Intent
 - c. Education and Industry Consortium Update
10. National Association of Workforce Boards (NAWB) Forum - March 23-26, 2024
11. Adjournment

The next Executive Meeting will be on January 12, 2023

collaborate.
innovate.
lead.

AGENDA ITEM SUMMARY

Title	Declarations of Conflict of Interest
Strategic Plans/Goals	N/A
Policy/Plan/Law	Public Law 105-220
Action Requested	None - Information Only
Background	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
Staff Recommendations	None - Information Only
Supporting Material	8B Memorandum of Voting Conflict of Interest Form
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 4

AGENDA ITEM SUMMARY

Title	September and October 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 September and October 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 September and October Financial Reports - PY 2023-2024
Supporting Material	September and October 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 September 30, 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 23-24Supplemental		\$ -	\$ 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	\$ -	\$ -	\$ 25,977	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 19,917
PY 23-24Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 24-25		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 22-23		\$ -	\$ 118,600	\$ 184,777	\$ 81,565	\$ 57,470	\$ 9,747	\$ 8,547	\$ 73,358	\$ -	\$ 146,600
TOTAL		\$ 353,364	\$ 118,600	\$ 184,777	\$ 107,542	\$ 57,470	\$ 9,747	\$ 8,547	\$ 73,358	\$ -	\$ 166,517
% of Total Budgeted Funding Received		27.04%	13.42%	18.92%	25.29%	16.50%	31.92%	20.99%	16.04%	#DIV/0!	17.01%
EXPENDITURES											
Administrative	\$ (0)	\$ 28,150	\$ 45,879	\$ 7,207	\$ 11,902	\$ 6,404	\$ 885	\$ 741	\$ 11,571	\$ -	\$ 17,485
Salaries and Benefits	\$ 105,892	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 56,187	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (162,079)	\$ 75,600	\$ 7,656	\$ 7,207	\$ 2,676	\$ 6,404	\$ 885	\$ 741	\$ 11,571	\$ -	\$ 17,485
Reclassification	\$ -	\$ (47,450)	\$ 38,223	\$ -	\$ 9,227	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ 0	\$ 258,214	\$ 262,163	\$ 219,755	\$ 95,639	\$ 47,765	\$ 9,576	\$ 8,635	\$ 83,577	\$ -	\$ 126,358
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 177,458	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 68,071	\$ 277,215	\$ 24,313	\$ 5,290	\$ 6,098	\$ 30,067	\$ 1,553	\$ 1,553	\$ 57,366	\$ -	\$ 67,008
Contract Labor	\$ -	\$ 5,853	\$ 548	\$ -	\$ 11	\$ 3,425	\$ 5	\$ 5	\$ 4,569	\$ -	\$ 3,343
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 475
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,596
Support Services ITA	\$ -	\$ 1,005	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ 82,392	\$ 15,481	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-OJT	\$ -	\$ 48,689	\$ 3,058	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 903	\$ 2,327	\$ 370	\$ 652	\$ 443	\$ 402	\$ 927	\$ 2	\$ 488	\$ -	\$ 685
One Stop Shared Costs	\$ -	\$ 39,699	\$ 1,848	\$ -	\$ 11,672	\$ 4,926	\$ 5,836	\$ 5,836	\$ 10,613	\$ -	\$ 10,546
Other Operating Expenses	\$ 15,837	\$ 35,083	\$ 3,662	\$ 32,583	\$ 11,281	\$ 5,593	\$ 791	\$ 850	\$ 4,487	\$ -	\$ 33,556
Allocated Program Indirect	\$ (84,812)	\$ 39,559	\$ 4,006	\$ 3,771	\$ 1,400	\$ 3,351	\$ 463	\$ 388	\$ 6,055	\$ -	\$ 9,150
Reclassification	\$ -	\$ (273,609)	\$ 208,875	\$ -	\$ 64,734	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expenditures	\$ 0	\$ 286,364	\$ 308,042	\$ 226,962	\$ 107,542	\$ 54,168	\$ 10,461	\$ 9,376	\$ 95,147	\$ -	\$ 143,844
Funding Over/(under) expenditures	\$ 0	\$ 67,000	\$ (189,442)	\$ (42,185)	\$ -	\$ 3,302	\$ (714)	\$ (829)	\$ (21,789)	\$ -	\$ 22,674
YTD % of Budgeted Funds Expended		21.91%	34.86%	23.24%	25.29%	15.56%	34.26%	23.03%	20.81%	#DIV/0!	14.70%

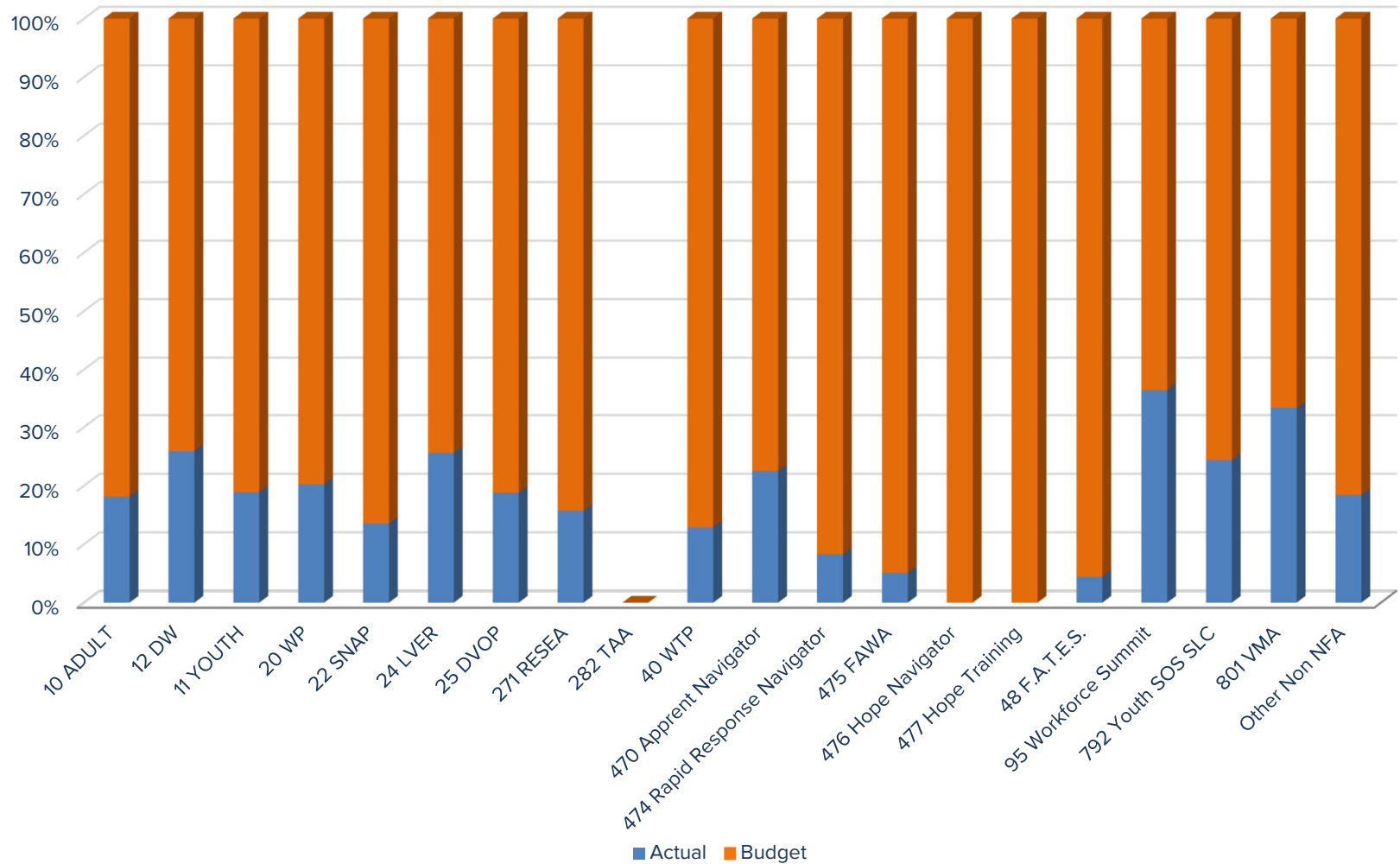
LWDB 20
Summary of Funding and Expenditures
As of September 30, 2023

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	\$ -	\$ -	\$ 156,308	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ 62,499	\$ 32,060	\$ 1,571,026	\$ 73,283	\$ 104,686	\$ 59,265	\$ 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	\$ 4,300	\$ 4,200	\$ -	\$ -	\$ -	\$ -	\$ 59,518	\$ -	\$ 6,012	\$ -
PY 23-24 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 15,658
Additional Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 156,308	\$ -	\$ 88,126	\$ -	\$ -
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 24-25	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 22-23	\$ -	\$ -	\$ 94,741	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ 4,300	\$ 4,200	\$ 94,741	\$ -	\$ -	\$ 156,308	\$ 59,518	\$ 88,126	\$ 6,012	\$ 15,658
% of Total Budgeted Funding Received	0.00%	13.10%	6.03%	0.00%	0.00%	263.74%	0.00%	59.05%	50.00%	26.08%
EXPENDITURES										
Administrative	\$ 2,265	\$ 353	\$ 10,555	\$ -	\$ -	\$ 340	\$ 10,584	\$ 6,193	\$ -	\$ 1,564
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ 2,265	\$ 353	\$ 10,555	\$ -	\$ -	\$ 340	\$ 10,584	\$ 6,193	\$ -	\$ 1,564
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ 15,814	\$ 2,521	\$ 73,251	\$ -	\$ -	\$ 2,400	\$ 69,272	\$ 41,665	\$ 6,012	\$ 11,923
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 12,168	\$ 2,016	\$ 35,124	\$ -	\$ -	\$ 1,526	\$ -	\$ 3,599	\$ -	\$ 4,596
Contract Labor	\$ 277	\$ 9	\$ 1,003	\$ -	\$ -	\$ 43	\$ -	\$ -	\$ -	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 100	\$ -	\$ -	\$ -	\$ -
Support Services ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-OJT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 31,733	\$ -	\$ -
Travel	\$ 201	\$ 4	\$ 509	\$ -	\$ -	\$ 9	\$ -	\$ -	\$ -	\$ 160
One Stop Shared Costs	\$ 1,732	\$ 51	\$ 6,972	\$ -	\$ -	\$ 282	\$ -	\$ 1,689	\$ -	\$ 2,152
Other Operating Expenses	\$ 251	\$ 256	\$ 24,121	\$ -	\$ -	\$ 263	\$ 63,734	\$ 1,404	\$ 6,012	\$ 4,197
Allocated Program Indirect	\$ 1,185	\$ 185	\$ 5,523	\$ -	\$ -	\$ 178	\$ 5,538	\$ 3,241	\$ -	\$ 818
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expenditures	\$ 18,079	\$ 2,873	\$ 83,807	\$ -	\$ -	\$ 2,740	\$ 79,856	\$ 47,858	\$ 6,012	\$ 13,488
Funding Over/(under) expenditures	\$ (13,779)	\$ 1,327	\$ 10,934	\$ -	\$ -	\$ 153,568	\$ (20,338)	\$ 40,268	\$ -	\$ 2,170
YTD % of Budgeted Funds Expended	0.00%	8.96%	5.33%	0.00%	0.00%	4.62%	0.00%	32.07%	50.00%	22.46%

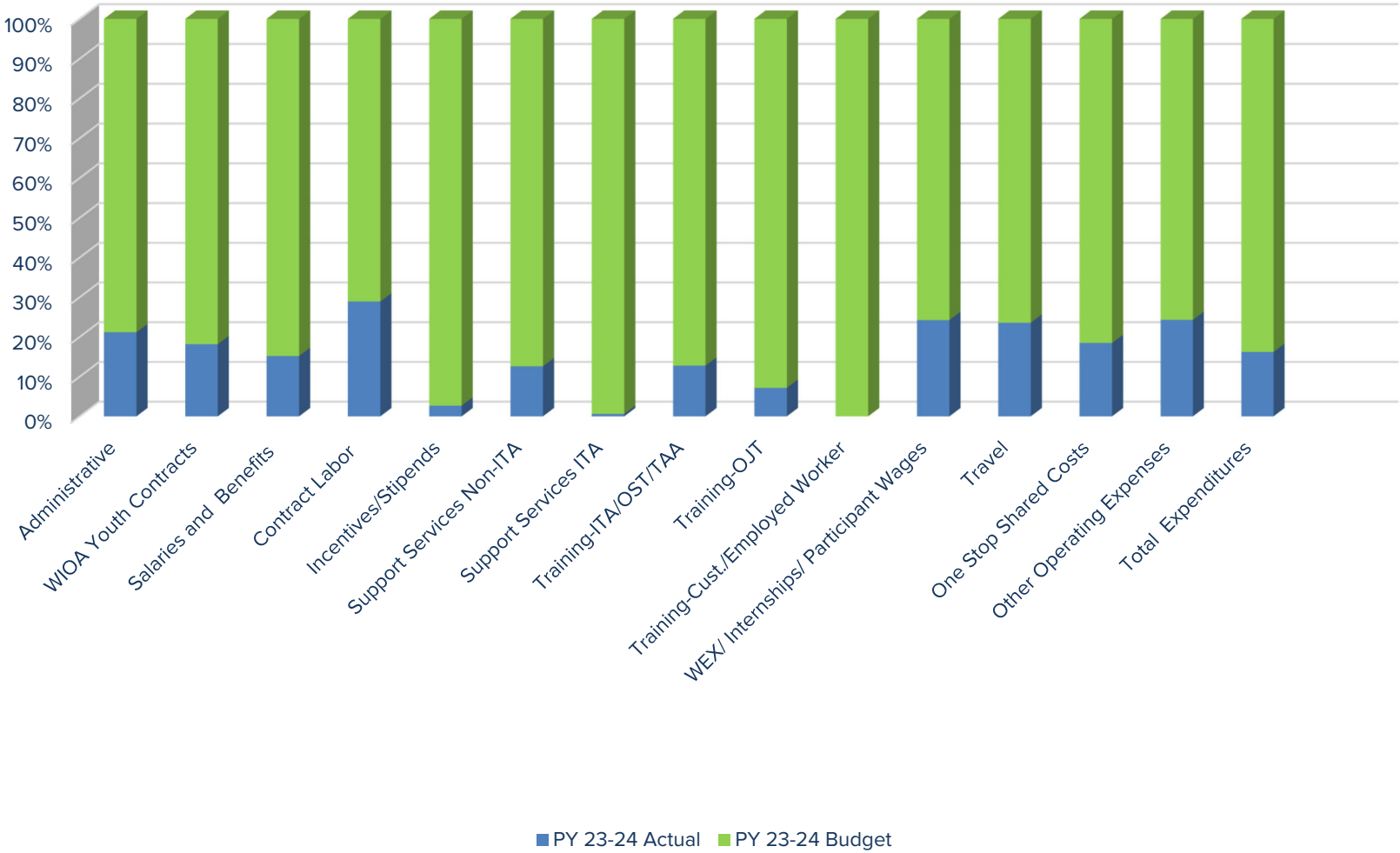
LWDB 20
Summary of Funding and Expenditures
As of September 30, 2023

PY 23-24 TOTAL AVAILABLE FUNDING	YEAR TO DATE TOTALS			
PY 23-24 Allocations		\$	6,052,509	
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		\$	5,167,322	
TOTAL		\$	7,712,195	
FUNDING DRAWN DOWN YTD				
	PY 23-24 Actual	PY 23-24 Budget	VARIANCE	% Expended
PY 23-24 Allocations	\$ 473,289	\$ 6,052,509	\$ 5,579,220	7.820%
PY 23-24 Supplemental	\$ -	\$ 164,384	\$ 164,384	0.000%
Unrestricted Funds Earned this year	\$ 15,658	\$ 60,046	\$ 44,388	26.076%
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	\$ 775,405	\$ 5,167,322	\$ 4,391,917	15.006%
TOTAL	\$ 1,508,786	\$ 7,712,195	\$ 6,203,410	19.564%
% of Total Budgeted Funding Received	19.56%			
EXPENDITURES				
	PY 23-24 Actual	PY 23-24 Budget	VARIANCE	% Expended
Administrative	\$ 162,079	\$ 603,121	\$ 441,042	26.87%
Salaries and Benefits	\$ 105,892	\$ 515,350	\$ 409,459	20.55%
General and Administrative	\$ 56,187	\$ 86,486	\$ 30,299	64.97%
Allocated Indirect Costs	\$ (0)	\$ 1,284	\$ 1,284	
Reclassification	\$ (0)	\$ -	\$ (0)	
Travel	\$ -	\$ -	\$ -	
Program Training	\$ 1,334,539	\$ 7,132,425	\$ 5,797,886	18.7%
WIOA Youth Contracts	\$ 177,458	\$ 800,000	\$ 622,542	22.2%
Salaries and Benefits	\$ 597,562	\$ 3,334,621	\$ 2,737,059	17.9%
Contract Labor	\$ 19,091	\$ 46,903	\$ 27,812	40.7%
Internship	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ 475	\$ 17,126	\$ 16,651	2.8%
Support Services Non-ITA	\$ 1,696	\$ 11,759	\$ 10,063	14.4%
Support Services ITA	\$ 1,005	\$ 161,500	\$ 160,495	0.6%
Training-ITA/OST/TAA	\$ 97,874	\$ 668,415	\$ 570,541	14.6%
Training-OJT	\$ 51,747	\$ 670,424	\$ 618,677	7.7%
Training-Cust./Employed Worker	\$ -	\$ 78,000	\$ 78,000	0.0%
WEX/ Internships/ Participant Wages	\$ 31,733	\$ 99,226	\$ 67,493	32.0%
Travel	\$ 8,084	\$ 26,215	\$ 18,131	30.8%
One Stop Shared Costs	\$ 103,854	\$ 458,387	\$ 354,533	22.7%
Other Operating Expenses	\$ 243,960	\$ 760,393	\$ 516,433	32.1%
Allocated Program Indirect	\$ 0	\$ (544)	\$ -	
Reclassification	\$ (0)	\$ -	\$ (0)	
Total Expenditures	\$ 1,496,618	\$ 7,735,546	\$ 6,238,928	19.3%
Funding Over/(under) expenditures	\$ 12,168			
YTD % of Budgeted Funds Expended	19.41%			

Budget to Actual Expenditures by Program as of September 30, 2023



Budget to Actual by Expenditure Category as of September 30, 2023



LWDB 20
Summary of Funding and Expenditures
As of October 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
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	40 WTP
PY 23-24 Allocations		\$ 353,364	\$ -	\$ -	\$ 55,977	\$ -	\$ -	\$ -	\$ -	\$ 55,917
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		\$ -	\$ 473,600	\$ 245,777	\$ 81,565	\$ 71,470	\$ 13,847	\$ 12,147	\$ 134,912	\$ 146,600
TOTAL		\$ 353,364	\$ 473,600	\$ 245,777	\$ 137,542	\$ 71,470	\$ 13,847	\$ 12,147	\$ 134,912	\$ 202,517
% of Total Budgeted Funding Received		27.04%	53.60%	25.16%	32.35%	20.52%	45.35%	29.83%	29.51%	20.69%
EXPENDITURES										
Administrative	\$ -	\$ 28,150	\$ 70,057	\$ 8,462	\$ 19,332	\$ 7,490	\$ 1,505	\$ 1,305	\$ 17,214	\$ 22,824
Salaries and Benefits	\$ 138,150	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 74,830	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (212,980)	\$ 104,349	\$ 9,584	\$ 8,462	\$ 3,605	\$ 7,490	\$ 1,505	\$ 1,305	\$ 17,214	\$ 22,824
Reclassification	\$ -	\$ (76,199)	\$ 60,473	\$ -	\$ 15,727	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ 258,214	\$ 469,941	\$ 297,111	\$ 104,303	\$ 55,409	\$ 14,564	\$ 13,255	\$ 123,080	\$ 163,872
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 242,400	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 85,033	\$ 364,019	\$ 31,254	\$ 7,076	\$ 8,157	\$ 35,562	\$ 2,133	\$ 2,133	\$ 82,167	\$ 91,029
Contract Labor	\$ -	\$ 6,727	\$ 623	\$ -	\$ 13	\$ 3,465	\$ 7	\$ 7	\$ 9,187	\$ 7,039
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 475
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,596
Support Services ITA	\$ -	\$ 1,430	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ 102,096	\$ 15,481	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-OJT	\$ -	\$ 97,124	\$ 6,126	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 1,152	\$ 3,684	\$ 520	\$ 691	\$ 1,534	\$ 507	\$ 3,007	\$ 1,793	\$ 900	\$ 1,070
One Stop Shared Costs	\$ -	\$ 50,139	\$ 2,740	\$ -	\$ 14,032	\$ 5,402	\$ 7,404	\$ 7,404	\$ 14,842	\$ 13,770
Other Operating Expenses	\$ 19,747	\$ 49,382	\$ 4,877	\$ 42,736	\$ 14,040	\$ 6,749	\$ 1,264	\$ 1,270	\$ 7,423	\$ 37,540
Allocated Program Indirect	\$ (105,931)	\$ 51,901	\$ 4,767	\$ 4,209	\$ 1,793	\$ 3,726	\$ 749	\$ 649	\$ 8,562	\$ 11,352
Reclassification	\$ -	\$ (468,286)	\$ 403,552	\$ -	\$ 64,734	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expenditures	\$ 0	\$ 286,364	\$ 539,998	\$ 305,573	\$ 123,635	\$ 62,900	\$ 16,069	\$ 14,559	\$ 140,294	\$ 186,696
Funding Over/(under) expenditures	\$ 0	\$ 67,000	\$ (66,398)	\$ (59,796)	\$ 13,906	\$ 8,571	\$ (2,223)	\$ (2,412)	\$ (5,382)	\$ 15,821
YTD % of Budgeted Funds Expended		21.91%	61.11%	31.28%	29.08%	18.06%	52.63%	35.75%	30.68%	19.07%

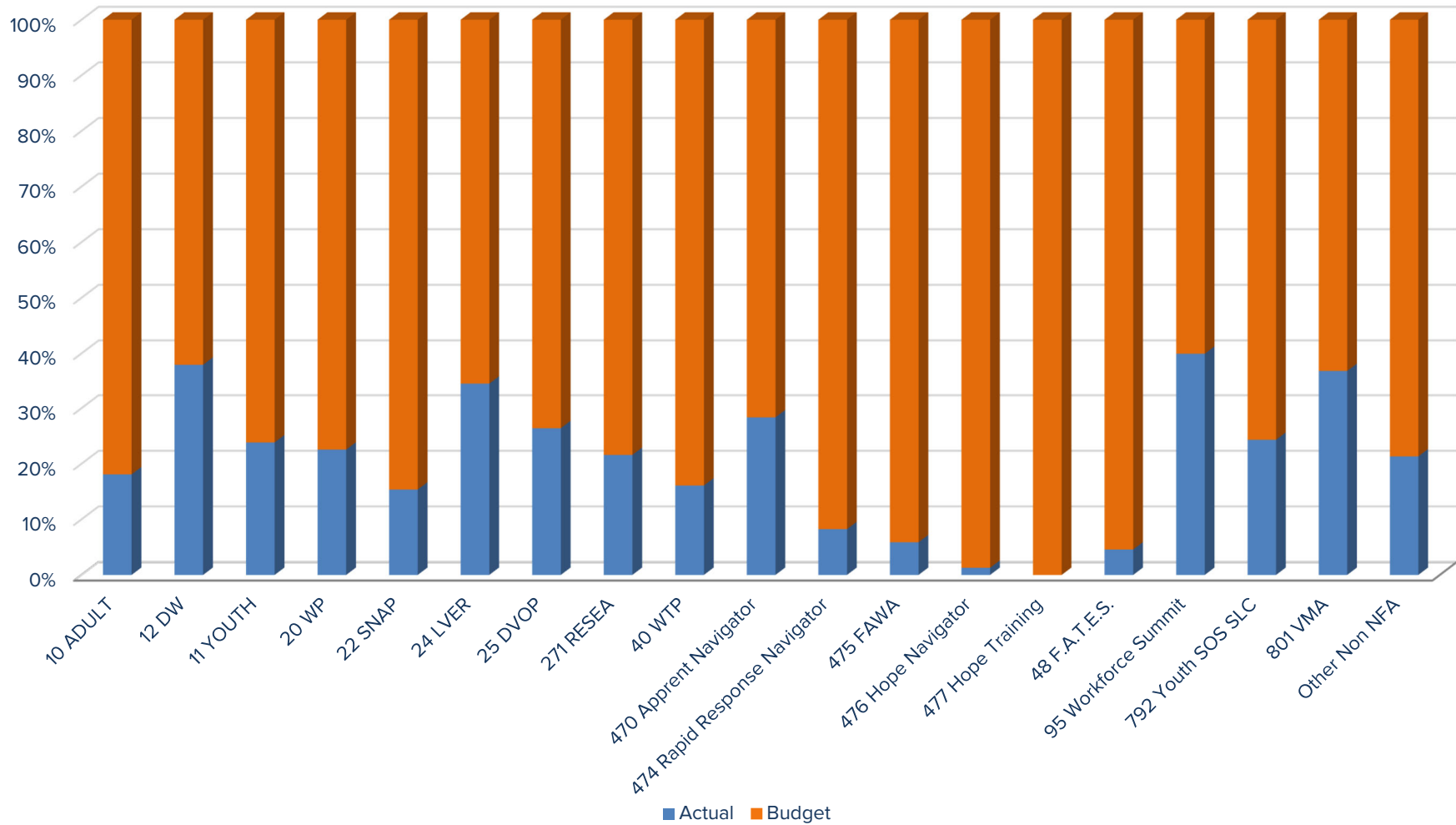
LWDB 20
Summary of Funding and Expenditures
As of October 31, 2023

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	\$ -	\$ -	\$ 156,308	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ 62,499	\$ 32,060	\$ 1,571,026	\$ 73,283	\$ 104,686	\$ 59,265	\$ 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	\$ 27,100	\$ 4,700	\$ -	\$ 500	\$ -	\$ -	\$ 97,518	\$ -	\$ 7,014	\$ -
PY 23-24 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 16,095
Additional Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 156,308	\$ -	\$ 88,126	\$ -	\$ -
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 24-25	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 22-23	\$ -	\$ -	\$ 114,741	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ 27,100	\$ 4,700	\$ 114,741	\$ 500	\$ -	\$ 156,308	\$ 97,518	\$ 88,126	\$ 7,014	\$ 16,095
% of Total Budgeted Funding Received	0.00%	14.66%	7.30%	0.68%	0.00%	263.74%	0.00%	59.05%	58.33%	26.80%
EXPENDITURES										
Administrative	\$ 3,095	\$ 353	\$ 12,331	\$ 120	\$ -	\$ 353	\$ 12,319	\$ 6,197	\$ -	\$ 1,875
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ 3,095	\$ 353	\$ 12,331	\$ 120	\$ -	\$ 353	\$ 12,319	\$ 6,197	\$ -	\$ 1,875
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ 21,541	\$ 2,511	\$ 85,332	\$ 839	\$ -	\$ 2,475	\$ 80,268	\$ 41,506	\$ 7,014	\$ 14,332
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 16,560	\$ 2,016	\$ 44,609	\$ 641	\$ -	\$ 1,526	\$ -	\$ 3,599	\$ -	\$ 5,995
Contract Labor	\$ 333	\$ 9	\$ 1,123	\$ 9	\$ -	\$ 43	\$ -	\$ -	\$ -	\$ -
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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 31,733	\$ -	\$ -
Travel	\$ 305	\$ 4	\$ 666	\$ 7	\$ -	\$ 9	\$ -	\$ -	\$ -	\$ 225
One Stop Shared Costs	\$ 2,406	\$ 51	\$ 8,412	\$ 106	\$ -	\$ 282	\$ -	\$ 1,689	\$ -	\$ 2,820
Other Operating Expenses	\$ 398	\$ 256	\$ 24,388	\$ 17	\$ -	\$ 340	\$ 74,141	\$ 1,404	\$ 7,014	\$ 4,360
Allocated Program Indirect	\$ 1,539	\$ 176	\$ 6,133	\$ 59	\$ -	\$ 176	\$ 6,127	\$ 3,082	\$ -	\$ 932
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expenditures	\$ 24,636	\$ 2,864	\$ 97,663	\$ 958	\$ -	\$ 2,828	\$ 92,587	\$ 47,703	\$ 7,014	\$ 16,207
Funding Over/(under) expenditures	\$ 2,464	\$ 1,836	\$ 17,078	\$ (458)	\$ -	\$ 153,480	\$ 4,931	\$ 40,423	\$ -	\$ (112)
YTD % of Budgeted Funds Expended	0.00%	8.93%	6.22%	1.31%	0.00%	4.77%	0.00%	31.97%	58.33%	26.99%

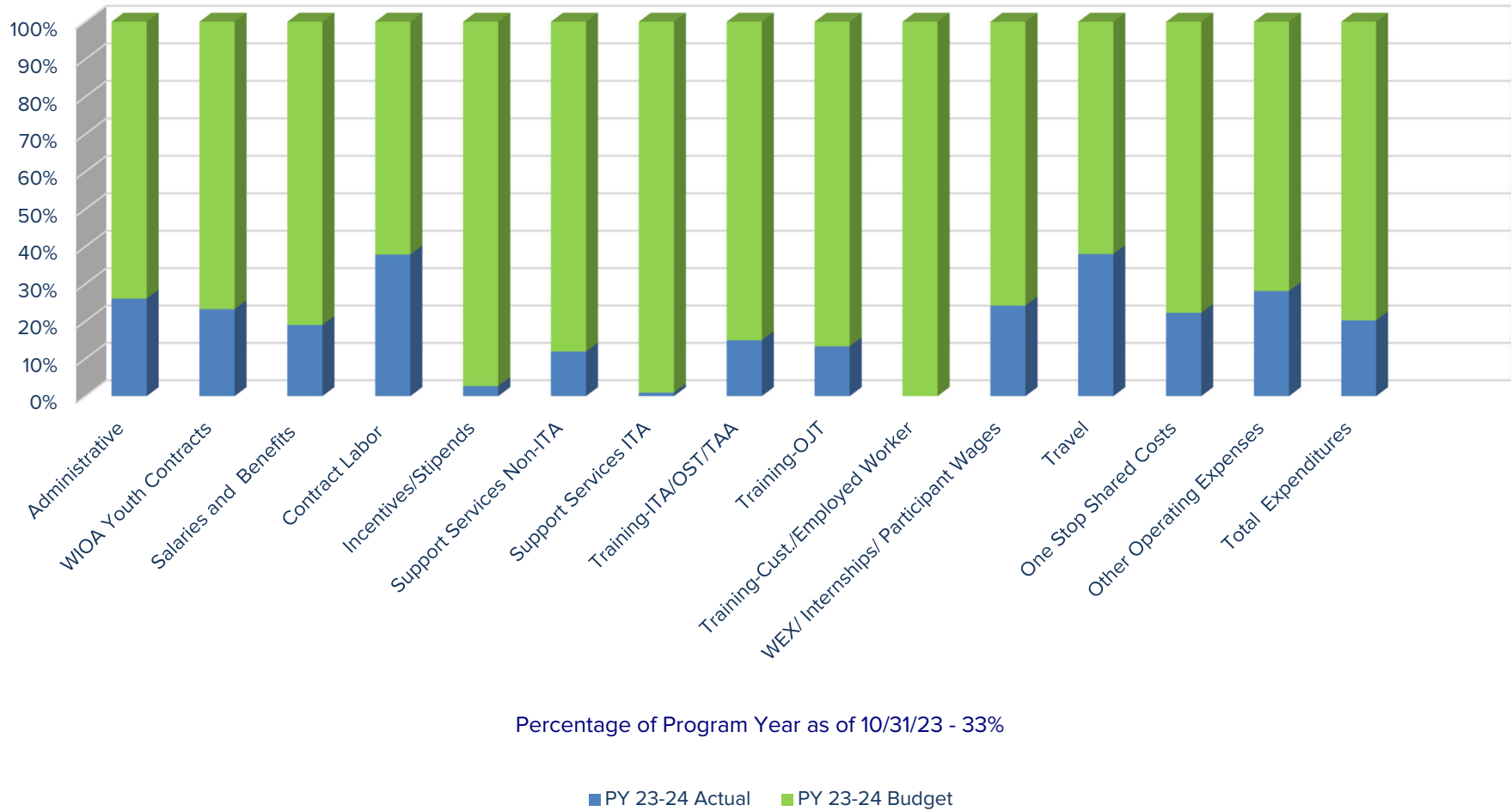
LWDB 20
Summary of Funding and Expenditures
As of October 31, 2023

PY 23-24 TOTAL AVAILABLE FUNDING	YEAR TO DATE TOTALS			
PY 23-24 Allocations		\$	6,052,509	
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		\$	5,167,322	
TOTAL		\$	7,712,195	
FUNDING DRAWN DOWN YTD				
	PY 23-24 Actual	PY 23-24 Budget	VARIANCE	% Expended
PY 23-24 Allocations	\$ 602,091	\$ 6,052,509	\$ 5,450,418	9.948%
PY 23-24 Supplemental	\$ -	\$ 164,384	\$ 164,384	0.000%
Unrestricted Funds Earned this year	\$ 16,095	\$ 60,046	\$ 43,951	26.805%
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	\$ 1,294,659	\$ 5,167,322	\$ 3,872,663	25.055%
TOTAL	\$ 2,157,279	\$ 7,712,195	\$ 5,554,916	27.972%
% of Total Budgeted Funding Received	27.97%			
EXPENDITURES				
	PY 23-24 Actual	PY 23-24 Budget	VARIANCE	% Expended
Administrative	\$ 212,980	\$ 603,121	\$ 390,141	35.31%
Salaries and Benefits	\$ 138,150	\$ 515,350	\$ 377,200	26.81%
General and Administrative	\$ 74,830	\$ 86,486	\$ 11,656	86.52%
Allocated Indirect Costs	\$ -	\$ 1,284	\$ 1,284	
Reclassification	\$ (0)	\$ -	\$ (0)	
Travel	\$ -	\$ -	\$ -	
Program Training	\$ 1,755,569	\$ 7,132,425	\$ 5,376,856	24.6%
WIOA Youth Contracts	\$ 242,400	\$ 800,000	\$ 557,600	30.3%
Salaries and Benefits	\$ 783,507	\$ 3,334,621	\$ 2,551,114	23.5%
Contract Labor	\$ 28,583	\$ 46,903	\$ 18,320	60.9%
Internship	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ 475	\$ 17,126	\$ 16,651	2.8%
Support Services Non-ITA	\$ 1,596	\$ 11,759	\$ 10,163	13.6%
Support Services ITA	\$ 1,530	\$ 161,500	\$ 159,970	0.9%
Training-ITA/OST/TAA	\$ 117,577	\$ 668,415	\$ 550,837	17.6%
Training-OJT	\$ 103,250	\$ 670,424	\$ 567,174	15.4%
Training-Cust./Employed Worker	\$ -	\$ 78,000	\$ 78,000	0.0%
WEX/ Internships/ Participant Wages	\$ 31,733	\$ 99,226	\$ 67,493	32.0%
Travel	\$ 16,073	\$ 26,215	\$ 10,142	61.3%
One Stop Shared Costs	\$ 131,499	\$ 458,387	\$ 326,888	28.7%
Other Operating Expenses	\$ 297,346	\$ 760,393	\$ 463,047	39.1%
Allocated Program Indirect	\$ (0)	\$ (544)	\$ -	
Reclassification	\$ (0)	\$ -	\$ (0)	
Total Expenditures	\$ 1,968,550	\$ 7,735,546	\$ 5,766,996	25.4%
Funding Over/(under) expenditures	\$ 188,729			
YTD % of Budgeted Funds Expended	25.53%			

Budget to Actual Expenditures by Program as of October 31, 2023



Budget to Actual by Expenditure Category as of October 31, 2023



AGENDA ITEM SUMMARY

Title Local Targeted Occupations List (LTOL) for 3rd 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 3rd Quarter of PY 2023-2024

Background 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.

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.

Staff Recommendation Staff reviewed local labor market information and resources regarding the LTOL. There are no recommended addition of occupations to the 3rd Quarter of PY 2023-2024 list. Staff recommends approval of this LTOL for the 3rd Quarter of PY 2023-2024.

Supporting Materials CareerSource Research Coast Local Targeted Occupations List

Board Staff Tracey McMorris
Vice President/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:

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- 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

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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				
					Mean	Entry			Mean	Entry			
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

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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	Welfare Transition (WT) - Work Registration Policy Revisions
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Florida Statute 445.025, Florida Administrative Code 65A-4.218, Temporary Assistance for Needy Families (TANF) State Plan
Action Requested	Review and Approve Welfare Transition (WT) - Work Registration Policy Revisions
Background	The TANF program emphasizes employment as a fundamental key to self-sufficiency. Temporary Cash Assistance (TCA) applicants are required to register for work at the Local Workforce Development Board (LWDB). This process is referred to as work registration. FLORIDACOMMERCE offers each LWDB the choice for work registration to be either fully automated (the State default) or partially automated to allow the completion of additional tasks outside the online process. CSRC, in conjunction with DEO, is responsible for administrating work registration to applicants of TCA in the Local Workforce Development Area 20.
Staff Recommendations	Review and Approve the Welfare Transition (WT) - Work Registration Policy Revisions
Supporting Material	Welfare Transition (WT) - Work Registration Policy Revisions
Board Staff	Brian Bauer President/CEO bbauer@careesourcerc.com (866-482-4473 ext. 418)



PURPOSE

The purpose of this policy is to establish a uniform standard that meets contractual and regulatory requirements for the facilitation of Work Registration for applicants of Temporary Cash Assistance (TCA).

The purpose of work registration is to familiarize the TCA applicant with the Welfare Transition (WT) Program's opportunities and obligations/requirements and to inform the applicant of the programs and services available to all job seekers at the CareerSource Research Coast (CSRC) Career Center.

BACKGROUND

The Temporary Aid for Needy Families (TANF) program emphasizes employment as a fundamental key to self-sufficiency. The Florida Statute 414.095 (2018) requires all non-exempt TCA applicants to register for work at the Local Workforce Development Board (LWDB). This process is referred to as work registration. The FLORIDACOMMERCE offers each LWDB the choice for work registration to be either fully automated (the State default) or partially automated to allow the completion of additional tasks outside the online process. CSRC, in conjunction with FLORIDACOMMERCE, is responsible for administering work registration to applicants of TCA in the Local Workforce Development Area ([LWDA](#)) 20.

LOCAL POLICY

For CSRC, work registration is partially automated. In addition to the online portion, CSRC requires each applicant to attend orientation with a WT Career Planner at one of CSRC's Career Centers. Once the online portion is complete, the applicant is provided with the designated day and time for orientation at the Career Center in his/her city of residence. The applicant may choose to attend orientation at any Career Center within LWDA 20. ~~notified to contact CSRC to schedule an appointment, either virtually or in person, with a WT Career Planner. During the appointment,~~ the Career Planner will provide an orientation tailored to the local service delivery method.

~~As a~~Virtual orientation may be is offered by the Career Planner as an option. If orientation is completed virtually, digital signatures will be accepted from both the Career Planner and the applicant.

Refer to the following document:

WTP- Work Registration Procedure



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LOCAL POLICY

For CSRC, work registration is partially automated. In addition to the online portion, CSRC requires each applicant to attend orientation with a WT Career Planner at one of CSRC's Career Centers. Once the online portion is complete, the applicant is provided with the designated day and time for orientation at the Career Center in his/her city of residence. The applicant may choose to attend orientation at any Career Center within LWDA 20. The Career Planner will provide an orientation tailored to the local service delivery method.

Virtual orientation may be offered by the Career Planner as an option. If orientation is completed virtually, digital signatures will be accepted from both the Career Planner and the applicant.

Refer to the following document:

WTP- Work Registration Procedure

AGENDA ITEM SUMMARY

Title	Executive Staff Holiday Bonuses
Strategic Plans/Goals	Administration & Strategic Planning
Policy/Plan/Law	DEO Grantee/Subgrantee Agreement /CSRC Employee Bonus Policy
Action Requested	Review and Approve Executive Staff Bonuses
Background	<p>Per the DEO (FLORIDACOMMERCE) Grantee/Sub-Grantee Agreement, no changes to compensation for the board's executive staff are allowed without documented Board approval and must align with local policies and procedures.</p> <p>CSRC's Employee Bonus Policy allows for non-discretionary bonuses for all CSRC staff not to exceed 5% of an employee's annual salary.</p>
Staff Recommendations	<p>Review and Approve Executive Staff Holiday Bonuses equivalent to one weeks pay, less payroll taxes and deductions.</p> <ul style="list-style-type: none"> • Brian Bauer, President/CEO • Tracey McMorris, Vice President of Operations/COO • Lisa Deligatti, CFO
Supporting Material	None
Board Staff	<p>Brian Bauer President/CEO bbaueri@careersourcerc.com (866) 482-4473 ext. 418</p>

AGENDA ITEM SUMMARY

Title	Taylor, Hall, Miller and Parker (THMP) Monitoring Report
Strategic Plans/Goals	Effective Utilization of Current and Timely Operational Intelligence for all Stakeholders
Policy/Plan/Law	DEO (FLORIDACOMMERCE) Grantee/Sub-Grantee Agreement, CSRC Administrative Plan
Action Requested	None - Information only
Background	<p>CSRC is responsible for monitoring all administration and program operations to ensure maximum effectiveness and efficiency of all management, programmatic and fiscal systems. Monitoring should ensure that abuses in program operations are identified promptly, resulting in the prevention and/or elimination of any misuse of funds.</p> <p>Per State requirements, CSRC conducts internal monitoring on a scheduled basis. Various staff members with programmatic experience are utilized to ensure that programs comply with federal/state/local regulations and policies. Internal monitoring is also completed to track performance, reach goals and provide for continuous improvement. Through a competitive procurement process, CSRC also contracts with an independent monitoring firm to review any potential programmatic or fiscal issues.</p> <p>Staff will provide the Executive Committee with the results of the monitoring completed by CSRC's independent monitoring firm, THMP.</p>
Staff	
Recommendations	None - Information Only
Supporting Material	THMP Monitoring Report - November 3, 2023
Board Staff	<p>Brian Bauer President/CEO bbauer@careersource.com (866) 482-4473 ext 418</p>

CAREERSOURCE RESEARCH COAST
PROGRAM YEAR 2023-2024
FINANCIAL & PROGRAMMATIC MONITORING
AS OF NOVEMBER 3, 2023

REPORT #1



Taylor | Hall | Miller | Parker | P.A.



Independent Accountants' Report
On Applying Agreed-Upon Procedures

To the Board of Directors and Management of CareerSource Research Coast:

We have performed the procedures enumerated below in the attached sections on the fiscal and programmatic records of CareerSource Research Coast (CareerSource) as of November 3, 2023, for the program year ending June 30, 2024. CareerSource's management is responsible for the fiscal and programmatic records.

CareerSource has agreed to and acknowledged that the procedures performed are appropriate to meet the intended purpose of conducting fiscal and programmatic monitoring. This report may not be suitable for any other purpose. The procedures performed may not address all the items of interest to a user of this report and may not meet the needs of all users of this report and, as such, users are responsible for determining whether the procedures performed are appropriate for their purposes.

For reporting purposes, findings and observations are as follows:

Findings—These items reflect non-compliance with governing regulations, internal policies, or contractual requirements and may illustrate questionable costs and/or problematic deficiencies in internal controls. These items can also indicate ineffective or improper procedures, systems, and/or records maintenance.

Observations—These items may be proactive in nature and highlight specific situations where particular changes may enhance customer service and program outcomes, strengthen internal controls, or improve financial information and documentation.

The procedures and associated findings and observations are detailed in the following sections:

- I. CareerSource
- II. Subrecipient Financial
- III. WIOA Adult/DW
- IV. WIOA Youth
- V. Wagner-Peyser
- VI. Reemployment Services and Eligibility Assessment (RESEA)
- VII. Welfare Transition Program (WTP)
- VIII. Supplemental Nutrition Assistance Program (SNAP)

We were engaged by CareerSource to perform this agreed-upon procedures engagement and conducted our engagement in accordance with attestation standards established by the American Institute of Certified Public Accountants. We were not engaged to and did not conduct an examination or review engagement, the objective of which would be the expression of an opinion or conclusion, respectively, on the fiscal and programmatic records of CareerSource. Accordingly, we do not express such an opinion or conclusion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

We are required to be independent of CareerSource and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements related to our agreed-upon procedures engagement.

Taylor Hall Miller Parker, P.A.

November 10, 2023

I. CareerSource

Procurement Review

1. We randomly selected the One-Stop Operator procurement for the contract period October 5, 2023 – June 30, 2024, obtained the procurement and contract files, and inspected the contract and/or procurement files to determine whether proper procedures related to the procurement were followed and properly documented, using DEO’s 2022-2023 Financial Monitoring Tool, TEGl 15-16 and CSF Policy #97 – One Stop Operator Procurement.

There were no findings or observations identified as a result of applying the procedures above to the sample selected.

One-Stop Operator

1. We inquired of CareerSource staff and randomly selected the latest quarterly report prepared by CareerSource (September 30, 2023) to substantiate and report the status of the following primary One-Stop Operator responsibilities/roles:

- Coordinate the service delivery of participating One-Stop Partners
- MOUs/IFAs
- Disclose conflicts of interest
- Establish firewalls
- Provide recommendations to improve coordination of services among Partners and continuous improvement strategies

There were no findings or observations identified as a result of applying the procedures above to the reports selected.

Memorandum of Understandings (MOUs) and Infrastructure Funding Agreements (IFAs)

1. We randomly selected the Comprehensive MOU/IFA agreement for the required One-Stop partners and inspected the agreement to determine if the following key elements required by TEGl 16-16 and 17-16 were included in the applicable document:

- Description of services
- One-Stop Operating budget
- Access
- Referral
- Duration
- Modification process
- Signatories of Chief Elected Official, Local Board Director, and Partner
- Identification of all One-Stop Partners participating in the IFA
- Description of the periodic modification and review process for the IFA

2. We determined if the IFA reconciliation process was performed for all required partners for the period ended June 30, 2023.

There were no findings or observations identified as a result of applying the procedures above to the sample selected.

Subrecipient Risk Assessment

1. We obtained a list of subrecipients for PY 2023-2024 and, based on this list, determined if a risk assessment as required by 2 CFR 200.332 had been completed for the subrecipient Eckerd Connects.

There were no findings or observations identified as a result of applying the procedures above to the subrecipient.

Financial Review

1. We selected a random sample of 15 small purchases (\$250,000 or less), including seven American Express credit card charges (statement closing date 8/29/2023), and two expense reimbursements from the period ended October 13, 2023, reviewed current policies and procedures, and determined whether:
 - a. check data agreed to invoice(s);
 - b. the ACH payment traced to the transaction on the bank statement or the check contained an authorized signature and endorsement agreed to payee, or bank guaranteed lack of endorsement, if applicable;
 - c. the disbursement was supported by proper documentation and approval;
 - d. purchasing and travel procedures were followed and a cost or price analysis was performed, if applicable;
 - e. the cost was allowable, reasonable, and necessary;
 - f. the cost was properly charged (i.e., benefiting program or cost pool) and classified;
 - g. payment traced to general ledger posting;
 - h. prior approval procedures were followed in accordance with DEO guidance, when applicable;
 - i. the cost was properly capitalized or tracked for inventory purposes in accordance with local policy, as applicable; and

- j. contracts in excess of \$35,000 were posted on CareerSource's website in accordance with the DEO agreement.

There were no findings or observations identified as a result of applying the procedures above to the sample selected.

- 2. We obtained CareerSource's Cost Allocation Plan (CAP), randomly selected the Overhead Cost Pool (Fund 80) and One-Stop Career Center Cost Pool (Fund 83) for the month of September 2023, and performed the following:

- a. Determined whether the method of allocation agreed with the cost allocation plan.
- b. Traced allocation bases to supporting documentation, including the supporting time data or expenditure reports.
- c. Recalculated cost pool allocation base percentages.
- d. Traced allocable cost data to supporting expenditure reports.
- e. Recalculated month-end allocations and traced to the general ledger.

There were no findings or observations identified as a result of applying the procedures above to the month selected.

- 3. We randomly selected the 2022 WIOA Dislocated Worker (NFA ID# 41552), 2022 WIOA Youth (NFA ID# 41382), 2021 WIOA State Level – Space Coast Alliance (NFA ID# 41783), 2023 Welfare Transition (NFA ID# 42777), 2022 SNAP (NFA ID# 41974), and 2022 RESEA (NFA ID# 41949) grants, obtained the Financial Report Summary (FRS) and supporting documentation for each NFA for the most recent month reported to Florida Commerce (September 2023), and performed the following:

- a. Confirmed the mathematical accuracy.
- b. Traced monthly and year-to-date expenditures to supporting schedules and the general ledger.
- c. Determined whether costs were properly reported among the SERA cost categories.
- d. Determined whether administrative costs were limited to the appropriate guidelines.

There were no findings or observations identified as a result of applying the procedures above to the sample selected.

- 4. We randomly selected the SERA cash draw worksheet for the October 18, 2023, cash order and determined whether the request for funds was supported by documentation of the anticipated expenditures.

There were no findings or observations identified as a result of applying the procedures above to the sample selected.

Customer-Related Expenditures

1. We selected a random sample of two WT Summer Teen Pregnancy Prevention Program invoices from the period July 1, 2023, through September 30, 2023, and performed the following:
 - a. Determined whether check data agreed to invoice(s).
 - b. Determined whether the check contained an authorized signature and endorsement agreed to payee, or bank guaranteed lack of endorsement, if applicable.
 - c. Confirmed the mathematical accuracy.
 - d. Determined whether the amount invoiced agreed with the contract amount (off-the-shelf pricing).
 - e. Determined whether appropriate documentation as required by CareerSource was submitted to support payment.
 - f. For a random sample of 10 participants (five from each invoice), determined whether:
 1. the participant's attendance was documented with a signed Program Attendance Form, and
 2. a TANF eligibility form was completed.
 - g. Traced the payment to CareerSource's general ledger.

Boys and Girls Club of St. Lucie County (ck# 82745, \$5,520.00)

End It Corporation (ck# 82720, \$14,400.00)

There were no findings or observations identified as a result of applying the procedures above to the sample selected.

2. We selected a random sample of three WIOA On-the-Job Training (OJT) payments from the period ended October 19, 2023, and performed the following for a random sample of employer invoices included with the payment:
 - a. Confirmed the mathematical accuracy.
 - b. Determined whether the amount invoiced/reimbursed agreed with the OJT agreement/training plan.

- c. Determined whether appropriate documentation as required by the contract/agreement was submitted to support payment.
- d. For a random sample of customers identified on the invoice, we determined whether:
 - 1. the customer was properly registered in Employ Florida (EF);
 - 2. an OJT activity was recorded; and
 - 3. the employment wage rate at case closure agreed with the information provided by the employer, if applicable.
- e. Traced the payment to the general ledger.
- f. Determined whether the check contained authorized signatures and endorsement agreed to payee, or bank guaranteed lack of endorsement, if applicable.

Ox of South Florida, Inc. (ck# 82838, \$1,071.81)
REA Technical Services LLC (ck# 82897, \$1,404.90)
St. Lucie County Fire District (ck# 82900, \$25,815.24)

There were no findings or observations identified as a result of applying the procedures above to the sample selected.

II. Subrecipient Financial

Subrecipient Payment Request

1. We obtained a list of subrecipients for PY 2023-2024 and, based on this list, selected the most recent payment request submitted by Eckerd Connects for the WIOA Youth grant (August 2023), and performed the following:
 - a. Confirmed the mathematical accuracy.
 - b. Traced line-item costs to the subrecipient's general ledger.
 - c. For a random sample of payroll disbursements, obtained the supporting detail by employee salary and related benefits to determine whether the costs were allowable and properly allocated, and whether payroll allocation percentages recalculated and traced to supporting documentation and PARs (Personnel Activity Reports).
 - d. For a random sample of operating and travel disbursements, determined whether the vendor invoice was present and supported by proof of payment (copies of checks), and the costs were allowable, properly allocated and classified and traced to the general ledger.
 - e. Determined whether costs were charged/allocated in accordance with the subrecipient's Cost Allocation Plan.
 - f. Determined whether indirect costs were properly billed in accordance with the subrecipient's approved indirect rate.
 - g. For the work experience invoices from UpRys LLC, traced costs to supporting documentation and, for a random sample of work experience payments, determined whether:
 1. costs were supported by a payroll register,
 2. gross pay recalculated and deductions appeared reasonable,
 3. the pay rate was authorized,
 4. hours paid traced to the supporting timesheet and the timesheet was properly approved,
 5. a properly signed worksite agreement and internship description existed,
 6. the customer was registered in EF with a paid work experience activity open,
 7. the payroll service fee recalculated in accordance with the agreement, and
 8. costs were properly classified as WIOA In-School or Out-of-School.

- h. Determined whether the subrecipient adhered to the line-item contract budget.
- i. Determined whether costs were properly reported between WIOA In-School and Out-of-School Youth and to the classification of work experience.
- j. Traced the payment to the CareerSource's general ledger posting.
- k. Determined whether the contract was posted on CareerSource's website in accordance with the DEO agreement.

There were no findings or observations identified as a result of applying the procedures above to the subrecipient payment request selected.

III. WIOA Adult/DW

File/System Review

1. We selected a random sample of 10 WIOA Adult and Dislocated Worker customers from new enrollments in Employ Florida (EF) during PY22-23 and PY23-24 and inspected customer files and EF for evidence of eligibility and program documentation, using information on DEO's 2022-2023 WIOA Adult/DW Programmatic Review Tool.

Findings:

There were no findings identified as a result of applying the procedures above to the sample selected, except for the following:

1. For A.H. (EF ID# 15964648), the annualized family income (AFI) recorded on the WIOA application in EF could not be reconciled and did not agree with the calculation documented in the customer file; the error affected the WIOA low-income determination for priority of service. Additionally, the AFI calculation in the customer file omitted wages from one employer and used net pay rather than the gross pay for another.

Recommendation:

During fieldwork, the AFI calculation was corrected and the application in EF was updated as appropriate; no further corrective action is necessary.

Observations:

As a result of applying the procedures to the sample selected, we observed the following that should be addressed to improve case management, case file documentation and system information:

1. For J.E. (EF ID# 16405550), the annualized family income recorded on the WIOA application in EF was the calculated six-month income figure rather than the annualized figure documented in the customer file; the error did not affect the WIOA low-income determination for priority of service.

Recommendation:

During fieldwork, the application in EF was updated to reflect the correct AFI; no further corrective action is necessary.

IV. WIOA Youth

File/System Review

1. We selected a random sample of 10 WIOA Youth customers served by Eckerd Connects from enrollments in Employ Florida (EF) during PY22-23 and PY23-24 and inspected customer files and EF for evidence of eligibility and program documentation, using information on DEO's 2022-2023 WIOA Youth Programmatic Review Tool.

There were no findings or observations identified as a result of applying the procedures above to the sample selected.

V. Wagner-Peyser

Services Review

1. We selected a random sample of 20 Wagner-Peyser customers from Employ Florida (EF) and inspected documentation in EF for the period July 1, 2023, through October 30, 2023, to determine whether proper procedures were followed and the services provided were properly documented, using DEO's 2022-2023 Wagner-Peyser Programmatic Review Tool.

Findings:

There were no findings identified as a result of applying the procedures above to the sample selected, except for the following:

1. For the following Veteran customer, there was no priority of service code 189 and case note documenting the entitlements and services available to them:

Customer	EF ID#	Center
J.S.	16400247	St Lucie County

Recommendation:

No further corrective action is needed as the service code and case note were documented in EF during fieldwork. In the future, staff should ensure that Veteran customers receive a priority of service code and document the entitlements and services made available to the Veteran customer in a case note when recording code 189 in EF.

2. For the following Veteran customer, an EDP update was not recorded in EF at a minimum of every 30 days:

Customer	EF ID#	Center
J.S.	16400247	St Lucie County

Recommendation:

When an EDP is created for a customer, staff should ensure that it is updated within 30 days and at a minimum of every 30 days thereafter.

3. For the following Veteran customer, consistent contact every 30 days was not recorded in EF with service code V09:

Customer	EF ID#	Center
J.S.	16400247	St Lucie County

Recommendation:

For Veteran customers, consistent contact every 30 days should be made and documented in EF by recording service code V09 in EF.

- 4. For the following customer who received a staff-assisted job referral, there was no case note documenting the customer’s permission to make the referral as required by CSF Policy #099:

Customer	EF ID#	Center	Job Order #
E.S.	9503461	Martin	12273625

Recommendation:

No further corrective action is needed as a case note documenting the customer’s permission to make the referral was added to EF during fieldwork.

Job Order Review

- 1. We selected a random sample of 10 Wagner-Peyser job orders with open dates of July 1, 2023, or subsequent and inspected the job orders documented in EF, using information on DEO’s 2022-2023 Wagner-Peyser Programmatic Review Tool to determine whether proper procedures were followed.

Findings:

There were no findings identified as a result of applying the procedures above to the sample selected, except for the following:

- 1. The following job orders did not comply with EEO laws regarding discriminatory language and/or restrictions that are not bona-fide occupational qualifications:

Job Order	Comments
12238954	Inappropriate requirement: must pass background check rather than employer conducts background check.

Recommendation:

No further corrective action is needed as the job order language was corrected during fieldwork.

VI. Reemployment Services and Eligibility Assessment (RESEA)

File/System Review

1. For a random sample of six RESEA customers for the period July 1, 2023, through October 30, 2023, we inspected the services documented in Employ Florida, using information on DEO's 2022-2023 Wagner-Peyser Programmatic Review Tool for RESEA to determine whether proper procedures were followed.

There were no findings or observations identified as a result of applying the procedures above to the sample selected.

VII. Welfare Transition Program (WTP)

File/System Review

1. We selected a random sample of 15 cases that were active in the Welfare Transition Program (WTP) during the period July 1, 2023, through November 2, 2023, and utilized information on the 2022-2023 WTP Monitoring Tool developed by DEO to inspect the State system (OSST) and case files for evidence of compliance.

There were no findings identified as a result of applying the procedures above to the sample selected.

Observations:

1. As a result of applying the procedures to the sample selected, we observed the following issues that should be addressed to improve case management, case file documentation, and system information:

Orientation/Assessment

- The highest grade completed for participant R.J. (OSST ID# 4946541) was missing from OSST.

Employment

- The Job Tracking Start Date entered in OSST for participant K.J. (OSST ID# 4954953) was a date prior to the date of the most recent referral for participation.

Case Management

- Case notes did not provide a clear picture of what was happening with the case:

Participant	OSST ID#
K.L.	2733158
C.W.	4945059

Pre-penalties and Sanctions

- Sanctions were not requested in a timely manner:

Participant	OSST ID#
K.D.	4773294
K.L.	2733158
D.V.	4918749

Recommendation:

Specific details related to the observations are noted by case on the THMP monitoring work papers provided to CareerSource. In an effort to promote continuous improvement, case managers, supervisors, and management should review the above comments, as well as

work papers provided to CareerSource, and take action to improve WTP case management, file documentation, and system information.

2. We selected a random sample of two cases that were listed as Transitional in the Welfare Transition Program during the period July 1, 2023, through October 31, 2023, and utilized information on the 2022-2023 WTP Monitoring Tool developed by DEO to inspect case file and determine whether the participant was eligible for the transitional services provided and case was properly processed.

There were no findings or observations identified as a result of applying the procedures above to the sample selected.

VIII. Supplemental Nutrition Assistance Program (SNAP)

SNAP File/System Review

1. We inspected a random sample of five cases that were active in the Supplemental Nutrition Assistance Program (SNAP) during the period July 1, 2023, through October 30, 2023, and utilized the SNAP local operating procedures, the SNAP Florida State Plan for Federal Fiscal Year 2023, and the 2022-2023 SNAP Monitoring Tool developed by DEO to inspect the State system (OSST) and case files for evidence of compliance.

Findings:

1. As a result of applying the procedures to the sample selected, we confirmed that cases were processed in compliance with SNAP requirements, except for the following:

Case File Documentation

- The Opportunities & Obligations (O&O) Acknowledgement Form retained in the case file for participant C.R. (OSST ID# 4948771) was not signed and dated.

JPRs

- Documentation in the case file did not support the Education JPR entry for one month inspected for participant P.K. (OSST ID# 1890793). This JPR entry was corrected during fieldwork.

Recommendation:

Specific details related to the findings are noted by case on the THMP monitoring work papers provided to CareerSource. SNAP case managers, supervisors, and management should take action to ensure that requisite documentation is obtained and maintained in the case file and JPRs are correctly recorded into OSST.

Observations:

1. As a result of applying the procedures to the sample selected, we observed the following that should be addressed to improve case management, case file documentation, and system information:

Employment JPRs

- The Record of Pay Received (attached to EV form) that supported hours worked for recording Employment JPR entries appears to have been completed by participant C.R. (OSST ID# 4948771) and not verified by the employer or validated based on paystubs.
- Hours worked per the Earnings Statement for one pay period inspected for participant T.A. (OSST ID# 4951951) were incorrectly rounded-up when performing the calculation of hours worked each JPR week.

Case Management

- The Job Search activity in OSST was not properly ended when the activity assignment changed to be Employment only for participant T.A. (OSST ID# 4951951).
- There was lack of follow-up on, or participant P.K. (OSST ID# 1890793) was not held accountable for, attending a scheduled appointment.

Recommendation:

Specific details related to the observations are noted by case on the THMP monitoring work papers provided to CareerSource. In an effort to promote continuous improvement, case managers, supervisors, and management should review the above comments, as well as work papers provided to CareerSource, and take action to improve SNAP case management, file documentation, and system information. SNAP case managers should ensure case file documentation is complete and correct, information is correctly and timely recorded into OSST, and proper follow-up is conducted on scheduled appointments and due dates.

AGENDA ITEM SUMMARY

Title	President/CEO Performance Evaluation
Strategic Plans/Goals	Administration & Strategic Planning
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's
Action Requested	Discuss the President/CEO Performance Evaluation
Background	The Executive Committee members rate the performance of the President/CEO. The customary process is for an evaluation form to be e-mailed to Executive Committee members. Completed forms are to be returned to the Chairperson via e-mail. The Chairperson then tabulates the scores, presents the results to the Executive Committee, and discusses the results with the CEO.
Staff Recommendations	Review the evaluation process and determine the deadline for completion of the President/CEO Performance Evaluations
Supporting Material	None - Information Only
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

PRESIDENT/CEO PERFORMANCE EVALUATION

For: _____

Review Period: _____

Date Completed: _____

*Rating Scale: (4) Outstanding (3) Exceeds Expectation (2) Acceptable (1) Improvement Needed (0) Unsatisfactory
Written comments are required for any ratings of (0) or (1).*

I. Organizational Efficiency, Productivity and Effectiveness

PERFORMANCE CATEGORY	RATING	COMMENTS
Leadership – Demonstrates the ability to provide direction through influence and partnership providing appropriate guidance and administration.		
Planning – Plans realistic goals through the analysis of relevant information, based on the Workforce Boards mission; reviews progress; justifies costs; establishes realistic schedules; achieves results in a timely manner.		
Organizing – Arranges work for the most efficient handling and elimination of unnecessary activities		
Work Products – Produces reports, correspondence and other work products, which meet the intended objectives in a timely manner, while reflecting acceptable quality.		
Budget Management – Maintains appropriate budgetary controls; stays within budget; makes appropriate budgetary recommendations; monitors activities and initiates timely and effective correcting actions.		
Staffing – Selects qualified people; matches employee skills and abilities with job requirements; assigns staff appropriately for workload; develops and improves technical skills of staff; effectively evaluates staff and uses progress discipline if necessary.		

PRESIDENT/CEO PERFORMANCE EVALUATION

II. Individual Efficiency, Productivity and Effectiveness

PERFORMANCE CATEGORY	RATING	COMMENTS
Problem Analysis/Decision Making – Analyzes problems comprehensively; makes timely practical decisions.		
Presentations – Develops clean, well-organized and logical presentations; reduces complex issues to simple terms; is sensitive to audience levels.		
Self-Direction – Is personally well-organized; uses time effectively; acts independently.		
Self-Motivation – Is motivated to succeed; stretches personal resources; builds on strengths and works on deficiencies.		
Communication Skills – Communicates clearly and listens effectively; keeps others informed; deals effectively with conflict.		
Community Relations – Develops and maintains effective working relationships with other agencies, local and state personnel; legislature, media; the public; and awareness and involvement of community affairs.		
Board Interaction - Works effectively with individual Board members; works effectively with the Board as a whole, listens and reacts to Board input.		

PRESIDENT/CEO PERFORMANCE EVALUATION

III. Areas of Greatest Strength

IV. Areas of Greatest Opportunity for Growth

IV. OVERALL PERFORMANCE RATING IS _____

OUTSTANDING

- * No ratings of ***Unsatisfactory***
- * No ratings of ***Improvement Needed***
- * No ratings of ***Acceptable***
- * More than half of the ratings must be ***Outstanding***

EXCEEDS EXPECTATIONS

- * No ratings of ***Unsatisfactory***
- * No ratings of ***Improvement Needed***
- * More than half of the ratings must be ***Exceeds Expectation or above***

ACCEPTABLE

- * No ratings of ***Unsatisfactory***
- No more than five (5) ratings of ***Improvement Needed***

IMPROVEMENT NEEDED

- * Six (6) or more ratings of ***Improvement Needed***
- * No more than one (1) rating of ***Unsatisfactory***

UNSATISFACTORY

- Two (2) or more ratings of ***Unsatisfactory***

Overall, I am Satisfied Not Satisfied with the President/CEO's performance.

AGENDA ITEM SUMMARY

Title	Letter Grade Update - Change to Methodology for PY 2023-2024
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's
Action Requested	None - Information Only
Background	<p>The Reimagining Education and Career Help (REACH) Act calls for the assignment of local workforce development board letter grades to improve accountability in the workforce system. The law charges the Governor's REACH Office with developing criteria for determining letter grades and the CareerSource Florida Board of Directors with assigning and publicly releasing the letter grades annually. To that end, baseline letter grades were assigned for program year 2021-2022. On Oct. 12, 2023, the final official letter grades for program year 2022-2023 were posted on CareerSource Florida's website.</p> <p>In the spirit of continuous improvement, letter grade quarterly updates and annual results were tracked and analyzed to determine enhancements for program year 2023-2024. On November 14, a memorandum outlining the anticipated updates to the letter grades methodology for the current program year was distributed to local workforce development boards.</p>
Staff Recommendation	None - Information Only
Supporting Material	CareerSource Florida Memorandum
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418



MEMORANDUM

DATE: Nov. 14, 2023
TO: Local Workforce Development Board Chief Executives and Chief Operating Officers
FROM: Dan McGrew, Sr. Vice President
SUBJECT: Letter Grade Methodology for PY 2023-2024

The 2021 [Reimagining Education and Career Help \(REACH\) Act](#) seeks to improve accountability in the workforce system and calls for the assignment of letter grades to local workforce development boards. The law charges the Governor's REACH Office with developing criteria for determining letter grades and the CareerSource Florida Board of Directors with assigning and publicly releasing the letter grades on an annual basis.

To that end, letter grade criteria were developed by the Governor's REACH Office in collaboration with an interagency workgroup and feedback from local workforce development boards, and preliminary letter grades were assigned for program year 2021-2022. The methodology for letter grades remained unchanged in program year 2022-2023, and letter grades for that program year were assigned and released by the CareerSource Florida Board of Directors' Executive Committee on October 12, in compliance with Senate Bill 240, which went into effect on July 1.

Following the release of program year 2022-2023 letter grades, and per the [Updates to Letter Grade Methodology for PY 2023-2024 Memorandum](#) issued on July 28, the data that make up the letter grades were analyzed for continuous improvement. In an effort to continue to improve the state's workforce system, the following updates are being implemented to the letter grades methodology for program year 2023-2024:

- 1) Adjustments to two metric targets as follows:

Metric	PY 2022-2023 Target	PY 2023-2024 Target
Participants with Increased Earnings	45%	50%
Reduction in Public Assistance	35%	50%

- 2) The addition of WIOA Title II and Title IV data – from the Divisions of Career & Adult Education, Vocational Rehabilitation, and Blind Services at the Florida Department of Education – to the extra credit metric numerator so that local boards receive credit for serving individuals on public assistance and individuals co-enrolled in WIOA Title II or Title IV programs.

3) Adjustments to the Extra Credit points scale as follows:

PY 2022-2023 Extra Credit Points	PY 2023-2024 Extra Credit Points
≥ 50% = 5 points	≥ 55% = 5 points
46% to < 50% = 4 points	51% to < 55% = 4 points
44% to < 46% = 3 points	49% to < 51% = 3 points
42% to < 44% = 2 points	47% to < 49% = 2 points
40% to < 42% = 1 point	45% to < 47% = 1 point

Thank you for your continued partnership and commitment to transparency and accountability in our state. Please address questions to lettergrades@careersourceflorida.com.

cc: Katie Crofoot, Director, Governor’s Reimagining Education and Career Help Office
J. Alex Kelly, Commerce Secretary, Florida Department of Commerce
Brent McNeal, Director, Division of Vocational Rehabilitation
Kim Richey, Senior Chancellor, Florida Department of Education
Kevin O’Farrell, Chancellor, Division of Career & Adult Education
Robert Doyle, Director, Division of Blind Services

Metric	1. Participants with Increased Earnings	2. Reduction in Public Assistance	3. Employment and Training Outcomes	4. Participants in Work-Related Training	5. Continued Repeat Business	6. Year-Over-Year Business Penetration	7. Completion-to-Funding Ratio	Extra Credit: Serving Individuals on Public Assistance	
Numerator	1,174.00	764.00	16.00	416.00	475.00	-	3.21	1,301.00	
Denominator	2,590.00	1,506.00	18.00	3,387.00	2,841.00	-	2.77	3,133.00	
Previous Yr LWDB Worksites Served	-	-	-	-	-	644.00	-	-	
Previous Yr LWDB Worksites	-	-	-	-	-	12,111.00	-	-	
Current Yr LWDB Worksites Served	-	-	-	-	-	1,046.00	-	-	
Current Yr LWDB Worksites	-	-	-	-	-	12,484.00	-	-	
Previous Yr Business Penetration Rate	-	-	-	-	-	5.32	-	-	
Current Yr Business Penetration Rate	-	-	-	-	-	8.38	-	-	
YOY Rate DiFFerence	-	-	-	-	-	3.06	-	-	
LWDB Exiters	-	-	-	-	-	-	2,582.00	-	
Statewide Exiters	-	-	-	-	-	-	80,318.00	-	
LWDB Budget	-	-	-	-	-	-	\$4,368,677.00	-	
Statewide Budget	-	-	-	-	-	-	\$157,813,605.00	-	
Metric Weight	25%	25%	20%	10%	5%	5%	10%		
Rate	45.33	50.73	88.89	12.28	16.72	0.00	115.88	41.53	
Target	45.00	35.00	100.00	25.00	35.00	100.00	100.00	-	
Target Met	100.00	100.00	88.89	49.13	47.77	90.00	100.00	-	
Weighted Performance	25.00	25.00	17.78	4.91	2.39	4.50	10.00	1.00	90.58 A-
Adjusted Target	50.00	50.00						-	
Target Met	90.66	100.00						-	
Weighted Performance	22.66	25.00	17.78	4.91	2.39	4.50	10.00	0.00	87.24 B+
Difference [+ / (-)]	(2.34)	0.00	0.00	0.00	0.00	0.00	0.00	(1.00)	(3.34)

Performance with adjusted targets

PY22-23 Extra Credit Targets

>=	<	Points
40	42	1
42	44	2
44	46	3
46	50	4
50		5

Adjusted Extra Credit Targets

>=	<	Points
45	47	1
47	49	2
49	51	3
51	55	4
50		5

AGENDA ITEM SUMMARY

Title	Regional Planning Area - Collaboration with CareerSource Palm Beach
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's
Action Requested	Review Regional Planning Area - Letter of Intent
Background	On Sept. 19, 2023, the CareerSource Florida Board of Directors approved the CareerSource Florida Regional Planning Area Strategic Policy that 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.
Staff Recommendations	Review Regional Planning Area - Letter of Intent
Supporting Material	Regional Planning Area - Letter of Intent
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

LOCAL WORKFORCE DEVELOPMENT BOARD REGIONAL PLANNING AREA- APPLICATION LETTER

To the CareerSource Florida Board of Directors,

Please accept this letter as a formal letter of intent for **CareerSource Palm Beach County and CareerSource Research Coast** to request designation as a regional planning area.

Our respective local workforce development boards of directors understand that regional planning area designation is predicated upon completing a formal application requesting the designation. We further understand that the regional planning area must have shared characteristics among the local areas including:

- Labor markets,
- Economic development areas,
- Education and training resources to administer activities under WIOA,
- Population centers,
- Commuting patterns,
- Industrial composition and industry sector alignment,
- Location quotients,
- Labor force conditions
- Geographic boundaries.

Per CareerSource Florida Strategic Policy 2023.09.19.A.1, if successfully designated as a regional planning area, we are committed to completing a regional WIOA plan inclusive of the following features and processes:

- 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.

LOCAL WORKFORCE DEVELOPMENT BOARD REGIONAL PLANNING AREA- APPLICATION LETTER

- 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.

Julia Dattolo of CareerSource Palm Beach County and Brian Bauer of CareerSource Research Coast are currently in the process of obtaining the required approvals from elected officials to submit a formal designation request per the requirements forthcoming in the administrative policy. We expect to obtain approval from our local elected officials prior to the CareerSource Florida Board of Directors meeting scheduled for February 2024.

By signing below, as the Chairs of the **CareerSource Palm Beach County and CareerSource Research Coast** Board of Directors, we certify that our local workforce development boards intend to pursue designation as a regional planning area in accordance with FloridaCommerce and CareerSource Florida guidance.

Sincerely,

DocuSigned by:

Christopher Cothran

27D2D36A8A9F4B7...

Christopher Cothran

CareerSource Palm Beach County Chair, Board of Directors

DocuSigned by:

Leslie Kristof

222D52D0E860408...

Leslie Kristof

CareerSource Research Coast Chair, Board of Directors

AGENDA ITEM SUMMARY

Title	Education and Industry Consortium Update
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's
Action Requested	None - Information Only
Background	<p>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.</p> <p>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.</p> <p>The membership of the education and industry consortium must meet the following requirements:</p> <p>Industry Representative Requirements:</p> <ul style="list-style-type: none"> • 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. <p>Education Representative Requirements:</p> <ul style="list-style-type: none"> • Superintendents, presidents, or other leadership staff from education institutions in the local area that represent both public and private education entities in: <ul style="list-style-type: none"> ○ K-12 education ○ District technical colleges ○ State colleges ○ Universities ○ Other degree or credential-granting institutions in the local area
Staff Recommendations	None - Information Only
Supporting Material	None - Information Only
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>



Education and Industry Consortium

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.

Five Sectors of Industry:

- 1. Healthcare**
- 2. Manufacturing**
- 3. Logistics and Distribution**
- 4. Skilled Trades**
- 5. Professional Services**

Education Representative Requirements:

- Superintendents, presidents, or other leadership staff from education institutions in the local area that represent both public and private education entities.

Education Representatives:

- 1. K-12 Education: Aliesha Seitz, (CTE from Indian River County Scxhool District), Lana Barros**
- 2. District Technical Colleges: Bill Solomon**
- 3. State Colleges: Fortis College**
- 4. Universities: Keiser University**
- 5. Other Degree or Credential Granting Institutions in the Local Area: Christi Shields, Treasure Coast Technical College**





careersourcerc.com

{Date}
[Appointee name] [Position]
[Organization]

[Address]

Dear [appointee name]:

Congratulations on your appointment to serve on the Workforce Readiness Taskforce.

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 include 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 for businesses and job seekers in our local area.

Information about the role of education and industry consortiums is available in the statewide strategic policy. <https://careersourceflorida.com/wp-content/uploads/2023/09/Education-and-Industry-Consortiums-Strategic-Policy.pdf>.

Your appointment to the consortium is effective January 1, 2024, and concludes on December 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 Christina Coble at ccoble@careersourcerc.com.

Sincerely,

Leslie Kristof, Chair
CareerSource Research Coast

cc: Brian Bauer, President/CEO
Shelly Batton, Director of Programs

info@careersourcerc.com
Administrative Office
584 NW University Boulevard, Suite 100 | Port Saint Lucie, FL 34986
p: 866.482.4473 | f: 866.314.6580



[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)



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