

## MEETING AGENDA

### Meeting Details

**Date:** Friday, February 16, 2024

**Time:** 8:00 a.m.

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

### Microsoft TEAMS Virtual Meeting Access

**Access Code:** 324 146 732#

**Phone:** 1-772-800-5467

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

### Opening Remarks

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

### Voting Items

3. Review and Approve President/CEO Annual Performance Evaluation for 2023-2024
  - a. Evaluation Composite Rating Form
  - b. President/CEO Annual Performance Bonus
4. Review and Approve Financial Statement - November and December 31, 2023
5. Review and Approve Acceptance of 2022 - IRS Form 990 Tax Return
6. Review and Approve Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs

### Information/Discussion

7. Primary Indicators of Performance 2<sup>nd</sup> Quarter PY 2023-2024 (Tentative)
8. FLORIDACOMMERCE Programmatic Monitoring Preliminary Review
9. Ad Hoc Search Committee - Board Membership
10. Other Business
  - a. Regional Planning Area Designation Request
  - b. CareerSource Florida Board and Council Meetings - February 25-28, 2024
  - c. National Association of Workforce Boards (NAWB) Forum - March 23-26, 2024
  - d. Regional Planning Area Designation Request
  - e. Legislative/CareerSource Florida Updates
11. Adjournment - Next Executive Meeting March 15, 2024


## AGENDA ITEM SUMMARY

Title	President/CEO Annual Performance Evaluation
Strategic Plans/Goals	Administration & Strategic Planning
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's/DEO Grantee-Subgrantee Agreement /CSRC Employee Bonus Policy
Action Requested	Discuss the President/CEO Performance Evaluation & Approve any Annual Performance Bonus deemed appropriate.
Background	<p>The Executive Committee members rate the performance of the President/CEO annually. 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.</p> <p>Per the DEO Grantee/Sub-Grantee Agreement, no changes to compensation for CSRC's executive staff are allowed without documented approval from the Board of Directors and must align with local policies and procedures. CSRC's Employee Bonus Policy allows for non-discretionary, performance-based, year-end bonus/raise for all CSRC staff not to exceed 5% of an employee's annual salary.</p>
Staff Recommendations	None
Supporting Material	President/CEO Performance Evaluation - Composite Rating Form
Board Staff	<p>Brian Bauer President/CEO <a href="mailto:bbauer@careersourcerc.com">bbauer@careersourcerc.com</a> (866) 482-4473 ext. 418</p>

CEO Evaluation Tabulation - 1/29/2024

Committee Member	I. Organization, Efficiency, Productivity and Effectiveness						II. Individual Efficiency, Productivity and Effectiveness						
	Leadership	Planning	Organizing	Work Products	Budget Management	Staffing	Analysis/ Decision Making	Presentations	Self-Direction	Self-Motivation	Communication Skills	Community Relations	Board Interaction
Committee Member - 1	4	4	4	4	4	3	4	4	4	4	4	4	3
Committee Member - 2	3	3	3	3	4	2	3	4	3	3	3	2	3
Committee Member - 3	4	4	4	4	4	4	4	4	4	4	4	4	4
Committee Member - 4	4	4	4	4	4	4	4	4	4	4	4	4	4
Committee Member - 5	4	4	4	4	4	4	4	4	4	4	4	4	4
Committee Member - 6	4	4	4	4	4	3	4	4	3	4	4	4	4
Committee Member - 7	4	4	3	4	4	3	4	4	4	4	3	3	4
<b>Total</b>	<b>27</b>	<b>27</b>	<b>26</b>	<b>27</b>	<b>28</b>	<b>23</b>	<b>27</b>	<b>28</b>	<b>26</b>	<b>27</b>	<b>26</b>	<b>25</b>	<b>26</b>
<b>Average Grade</b>	<b>3.86</b>	<b>3.86</b>	<b>3.71</b>	<b>3.86</b>	<b>4.00</b>	<b>3.29</b>	<b>3.86</b>	<b>4.00</b>	<b>3.71</b>	<b>3.86</b>	<b>3.71</b>	<b>3.57</b>	<b>4.00</b>

**Combined Average** 3.79


DocuSigned by:  
  
 222D52D0E860408  
 Leslie Kristof, Chair of the Board

2/9/2024 | 9:02 AM PST  
 Date

**This performance evaluation has been reviewed and discussed with me.**

DocuSigned by:  
  
 81CFE86456304CC  
 Brian Bauer, President/CEO

2/9/2024 | 1:49 PM EST  
 Date

DocuSigned by:  
  
 222D52D0E860408  
 Leslie Kristof, Chair of the Board

2/9/2024 | 9:02 AM PST  
 Date



[careersourcerc.com](http://careersourcerc.com)

February 15, 2023

To whom it may concern,

Per the DEO Grantee/Sub-Grantee Agreement, no changes to compensation for CareerSource Research Coast (CSRC) executive staff are allowed without documented Board approval and must align with local policies and procedures. The Board shall ensure that all bonuses, pay raises, and benefits are reasonable and necessary for the successful performance of the award and are a prudent use of federal funding.

In compliance with the CSRC Administrative-Employee Bonus Policy, the Executive Committee for CareerSource Research Coast reviewed and approved the recommendation that Brian Bauer, President/CEO, will receive as part of his annual performance evaluation for the calendar year 2023- 2024 a five percent (5%) merit salary increase and a five percent (5%) annual performance bonus.

Sincerely,

Leslie Kristof  
Chair, Executive Committee

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

# Agenda Item 4

## AGENDA ITEM SUMMARY

<b>Title</b>	November and December Financial Reports - PY 2023-2024
<b>Strategic Plans/Goals</b>	Optimal Use of Resources
<b>Policy/Plan/Law</b>	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's
<b>Action Requested</b>	Review and Approve November and December Financial Reports - PY 2023-2024
<b>Background</b>	The Board approved the budget for PY 2023-2024. The Executive Committee regularly reviews budgets, all amendments to the budget, and monthly expenditures.
<b>Staff Recommendations</b>	Review and Approve November and December Financial Reports - PY 2023-2024
<b>Supporting Material</b>	November and December Financial Reports - PY 2023-2024
<b>Board Staff</b>	Lisa Delligatti CFO <a href="mailto:ldelligatti@careersourcerc.com">ldelligatti@careersourcerc.com</a> (866) 482-4473 ext. 430

LWDB 20  
Summary of Funding and Expenditures  
As of November 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	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)	\$ (51,322)	\$ (163,614)
Carryforward from PY 22-23		\$ 286,364	\$ 869,768	\$ 568,110	\$ 81,565	\$ 130,534	\$ 20,463	\$ 24,529	\$ 134,912	\$ 146,600
<b>TOTAL</b>	<b>\$ -</b>	<b>\$ 1,307,060</b>	<b>\$ 883,587</b>	<b>\$ 976,774</b>	<b>\$ 425,197</b>	<b>\$ 348,223</b>	<b>\$ 30,535</b>	<b>\$ 40,720</b>	<b>\$ 481,974</b>	<b>\$ 978,750</b>
<b>FUNDING DRAWN DOWN YTD</b>										
	INDIRECT	10 ADULT	12 DW	11 YOUTH	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	40 WTP
PY 23-24 Allocations		\$ 67,000	\$ -	\$ -	\$ 120,977	\$ 22,302	\$ -	\$ -	\$ -	\$ 96,417
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		\$ 286,364	\$ 733,600	\$ 325,777	\$ 81,565	\$ 54,168	\$ 18,347	\$ 16,247	\$ 134,912	\$ 146,600
<b>TOTAL</b>		<b>\$ 353,364</b>	<b>\$ 733,600</b>	<b>\$ 325,777</b>	<b>\$ 202,542</b>	<b>\$ 76,470</b>	<b>\$ 18,347</b>	<b>\$ 16,247</b>	<b>\$ 134,912</b>	<b>\$ 243,017</b>
<b>% of Total Budgeted Funding Received</b>		<b>27.04%</b>	<b>83.03%</b>	<b>33.35%</b>	<b>47.63%</b>	<b>21.96%</b>	<b>60.08%</b>	<b>39.90%</b>	<b>27.99%</b>	<b>24.83%</b>
<b>EXPENDITURES</b>										
<b>Administrative</b>	<b>\$ -</b>	<b>\$ 28,150</b>	<b>\$ 84,842</b>	<b>\$ 9,998</b>	<b>\$ 37,224</b>	<b>\$ 11,255</b>	<b>\$ 2,043</b>	<b>\$ 1,891</b>	<b>\$ 24,479</b>	<b>\$ 32,382</b>
Salaries and Benefits	\$ 170,905	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 111,366	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (282,272)	\$ 131,192	\$ 14,277	\$ 9,998	\$ 4,748	\$ 11,255	\$ 2,043	\$ 1,891	\$ 24,479	\$ 32,382
Reclassification	\$ -	\$ (103,042)	\$ 70,566	\$ -	\$ 32,477	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Program Training</b>	<b>\$ -</b>	<b>\$ 258,214</b>	<b>\$ 617,850</b>	<b>\$ 357,614</b>	<b>\$ 112,420</b>	<b>\$ 76,870</b>	<b>\$ 18,234</b>	<b>\$ 17,877</b>	<b>\$ 162,387</b>	<b>\$ 215,184</b>
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 291,991	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 105,294	\$ 430,300	\$ 43,488	\$ 8,507	\$ 10,432	\$ 49,003	\$ 2,875	\$ 3,247	\$ 105,490	\$ 122,404
Contract Labor	\$ -	\$ 6,727	\$ 623	\$ -	\$ 13	\$ 3,465	\$ 7	\$ 7	\$ 11,319	\$ 9,323
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 150
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,446
Support Services ITA	\$ -	\$ 3,755	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ 106,919	\$ 20,305	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 75
Training-OJT	\$ -	\$ 107,221	\$ 6,926	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 1,171	\$ 4,128	\$ 606	\$ 716	\$ 1,823	\$ 647	\$ 3,968	\$ 2,434	\$ 1,055	\$ 1,398
One Stop Shared Costs	\$ -	\$ 59,115	\$ 4,791	\$ 75	\$ 16,501	\$ 7,944	\$ 9,008	\$ 9,810	\$ 19,421	\$ 18,912
Other Operating Expenses	\$ 24,664	\$ 69,664	\$ 8,653	\$ 51,680	\$ 16,712	\$ 10,584	\$ 1,427	\$ 1,500	\$ 13,730	\$ 46,433
Allocated Program Indirect	\$ (131,129)	\$ 60,945	\$ 6,632	\$ 4,645	\$ 2,206	\$ 5,229	\$ 949	\$ 879	\$ 11,372	\$ 15,043
Reclassification	\$ -	\$ (590,560)	\$ 525,827	\$ -	\$ 64,734	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Expenditures</b>	<b>\$ 0</b>	<b>\$ 286,364</b>	<b>\$ 702,692</b>	<b>\$ 367,612</b>	<b>\$ 149,645</b>	<b>\$ 88,125</b>	<b>\$ 20,277</b>	<b>\$ 19,768</b>	<b>\$ 186,866</b>	<b>\$ 247,567</b>
<b>Funding Over/(under) expenditures</b>	<b>\$ 0</b>	<b>\$ 67,000</b>	<b>\$ 30,908</b>	<b>\$ (41,835)</b>	<b>\$ 52,897</b>	<b>\$ (11,655)</b>	<b>\$ (1,930)</b>	<b>\$ (3,521)</b>	<b>\$ (51,953)</b>	<b>\$ (4,549)</b>
<b>YTD % of Budgeted Funds Expended</b>		<b>21.91%</b>	<b>79.53%</b>	<b>37.64%</b>	<b>35.19%</b>	<b>25.31%</b>	<b>66.41%</b>	<b>48.55%</b>	<b>38.77%</b>	<b>25.29%</b>

LWDB 20  
Summary of Funding and Expenditures  
As of November 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	\$ -	\$ -	\$ -	\$ -
<b>TOTAL</b>	<b>\$ 62,499</b>	<b>\$ 32,060</b>	<b>\$ 1,571,026</b>	<b>\$ 73,283</b>	<b>\$ 104,686</b>	<b>\$ 59,265</b>	<b>\$ 140,000</b>	<b>\$ 149,230</b>	<b>\$ 12,024</b>	<b>\$ 60,046</b>
<b>FUNDING DRAWN DOWN YTD</b>										
	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	\$ 39,600	\$ 4,700	\$ -	\$ 2,600	\$ -	\$ -	\$ 97,518	\$ -	\$ 8,016	\$ -
PY 23-24 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 26,559
Additional Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 156,308	\$ -	\$ 39,944	\$ -	\$ -
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 24-25	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 22-23	\$ -	\$ -	\$ 123,441	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>TOTAL</b>	<b>\$ 39,600</b>	<b>\$ 4,700</b>	<b>\$ 123,441</b>	<b>\$ 2,600</b>	<b>\$ -</b>	<b>\$ 156,308</b>	<b>\$ 97,518</b>	<b>\$ 39,944</b>	<b>\$ 8,016</b>	<b>\$ 26,559</b>
<b>% of Total Budgeted Funding Received</b>	<b>0.00%</b>	<b>14.66%</b>	<b>7.86%</b>	<b>3.55%</b>	<b>0.00%</b>	<b>263.74%</b>	<b>0.00%</b>	<b>26.77%</b>	<b>66.67%</b>	<b>44.23%</b>
<b>EXPENDITURES</b>										
<b>Administrative</b>	<b>\$ 4,480</b>	<b>\$ 394</b>	<b>\$ 14,702</b>	<b>\$ 880</b>	<b>\$ -</b>	<b>\$ 394</b>	<b>\$ 20,114</b>	<b>\$ 6,678</b>	<b>\$ -</b>	<b>\$ 2,366</b>
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ 4,480	\$ 394	\$ 14,702	\$ 880	\$ -	\$ 394	\$ 20,114	\$ 6,678	\$ -	\$ 2,366
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Program Training</b>	<b>\$ 29,027</b>	<b>\$ 2,607</b>	<b>\$ 94,601</b>	<b>\$ 5,796</b>	<b>\$ -</b>	<b>\$ 2,558</b>	<b>\$ 119,886</b>	<b>\$ 41,526</b>	<b>\$ 8,016</b>	<b>\$ 16,775</b>
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 22,182	\$ 2,088	\$ 51,421	\$ 4,315	\$ -	\$ 1,526	\$ -	\$ 3,599	\$ -	\$ 7,052
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	\$ 319	\$ 4	\$ 827	\$ 16	\$ 9	\$ -	\$ -	\$ -	\$ -	\$ 225
One Stop Shared Costs	\$ 3,269	\$ 51	\$ 9,467	\$ 669	\$ -	\$ 282	\$ -	\$ 1,689	\$ -	\$ 3,329
Other Operating Expenses	\$ 843	\$ 273	\$ 24,932	\$ 378	\$ -	\$ 416	\$ 110,542	\$ 1,404	\$ 8,016	\$ 5,070
Allocated Program Indirect	\$ 2,081	\$ 183	\$ 6,830	\$ 409	\$ -	\$ 183	\$ 9,344	\$ 3,102	\$ -	\$ 1,099
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Expenditures</b>	<b>\$ 33,507</b>	<b>\$ 3,001</b>	<b>\$ 109,303</b>	<b>\$ 6,675</b>	<b>\$ -</b>	<b>\$ 2,951</b>	<b>\$ 140,000</b>	<b>\$ 48,204</b>	<b>\$ 8,016</b>	<b>\$ 19,142</b>
<b>Funding Over/(under) expenditures</b>	<b>\$ 6,093</b>	<b>\$ 1,699</b>	<b>\$ 14,138</b>	<b>\$ (4,075)</b>	<b>\$ -</b>	<b>\$ 153,357</b>	<b>\$ (42,482)</b>	<b>\$ (8,260)</b>	<b>\$ -</b>	<b>\$ 7,417</b>
<b>YTD % of Budgeted Funds Expended</b>	<b>0.00%</b>	<b>9.36%</b>	<b>6.96%</b>	<b>9.11%</b>	<b>0.00%</b>	<b>4.98%</b>	<b>0.00%</b>	<b>32.30%</b>	<b>66.67%</b>	<b>31.88%</b>

LWDB 20  
Summary of Funding and Expenditures  
As of November 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		\$	(3,344,949)	
Carryforward from PY 22-23		\$	5,179,694	
<b>TOTAL</b>		<b>\$</b>	<b>7,736,939</b>	
<b>FUNDING DRAWN DOWN YTD</b>				
	PY 23-24 Actual	PY 23-24 Budget	VARIANCE	% Expended
PY 23-24 Allocations	\$ 459,131	\$ 6,052,509	\$ 5,593,378	7.586%
PY 23-24 Supplemental	\$ -	\$ 164,384	\$ 164,384	0.000%
Unrestricted Funds Earned this year	\$ 26,559	\$ 60,046	\$ 33,487	44.231%
Additional Funds	\$ 196,252	\$ 149,230	\$ (47,022)	131.510%
Retained by DEO for Merit Salaries	\$ -	\$ (523,974)	\$ (523,974)	
Carryforward to PY 24-25	\$ -	\$ (3,344,949)	\$ (3,344,949)	
Carryforward from PY 22-23	\$ 1,921,021	\$ 5,179,694	\$ 3,258,673	37.088%
<b>TOTAL</b>	<b>\$ 2,602,963</b>	<b>\$ 7,736,939</b>	<b>\$ 5,133,977</b>	<b>33.643%</b>
<b>% of Total Budgeted Funding Received</b>	<b>33.64%</b>			
<b>EXPENDITURES</b>				
	PY 23-24 Actual	PY 23-24 Budget	VARIANCE	% Expended
<b>Administrative</b>	<b>\$ 282,272</b>	<b>\$ 603,121</b>	<b>\$ 320,849</b>	<b>46.80%</b>
Salaries and Benefits	\$ 170,905	\$ 515,350	\$ 344,445	33.16%
General and Administrative	\$ 111,366	\$ 86,486	\$ (24,880)	128.77%
Allocated Indirect Costs	\$ (0)	\$ 1,284	\$ 1,284	
Reclassification	\$ (0)	\$ -	\$ (0)	
Travel	\$ -	\$ -	\$ -	
<b>Program Training</b>	<b>\$ 2,157,441</b>	<b>\$ 7,132,425</b>	<b>\$ 4,974,984</b>	<b>30.2%</b>
WIOA Youth Contracts	\$ 291,991	\$ 800,000	\$ 508,009	36.5%
Salaries and Benefits	\$ 973,224	\$ 3,334,621	\$ 2,361,397	29.2%
Contract Labor	\$ 32,999	\$ 46,903	\$ 13,904	70.4%
Internship	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ 150	\$ 17,126	\$ 16,976	0.9%
Support Services Non-ITA	\$ 1,446	\$ 11,759	\$ 10,313	12.3%
Support Services ITA	\$ 3,855	\$ 161,500	\$ 157,645	2.4%
Training-ITA/OST/TAA	\$ 127,299	\$ 668,415	\$ 541,116	19.0%
Training-OJT	\$ 114,147	\$ 670,424	\$ 556,276	17.0%
Training-Cust./Employed Worker	\$ -	\$ 78,000	\$ 78,000	0.0%
WEX/ Internships/ Participant Wages	\$ 31,733	\$ 99,226	\$ 67,493	32.0%
Travel	\$ 19,345	\$ 26,215	\$ 6,870	73.8%
One Stop Shared Costs	\$ 164,333	\$ 458,387	\$ 294,054	35.9%
Other Operating Expenses	\$ 396,919	\$ 760,393	\$ 363,474	52.2%
Allocated Program Indirect	\$ 0	\$ (544)	\$ -	
Reclassification	\$ (0)	\$ -	\$ (0)	
<b>Total Expenditures</b>	<b>\$ 2,439,713</b>	<b>\$ 7,735,546</b>	<b>\$ 5,295,833</b>	<b>31.5%</b>
<b>Funding Over/(under) expenditures</b>	<b>\$ 163,249</b>			
<b>YTD % of Budgeted Funds Expended</b>	<b>31.53%</b>			



LWDB 20  
Summary of Funding and Expenditures  
As of December 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	40 WTP	470 Apprent Navigator
PY 23-24 Allocations		\$ 1,020,696	\$ 768,878	\$ 890,940	\$ 812,239	\$ 405,841	\$ 126,167	\$ 166,108	\$ 398,384	\$ 995,764	\$ 62,499
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)	\$ (51,322)	\$ (163,614)	\$ -
Carryforward from PY 22-23		\$ 286,364	\$ 869,768	\$ 568,110	\$ 81,565	\$ 130,534	\$ 20,463	\$ 24,529	\$ 134,912	\$ 146,600	\$ -
<b>TOTAL</b>	<b>\$ -</b>	<b>\$ 1,307,060</b>	<b>\$ 883,587</b>	<b>\$ 976,774</b>	<b>\$ 425,197</b>	<b>\$ 348,223</b>	<b>\$ 30,535</b>	<b>\$ 40,720</b>	<b>\$ 481,974</b>	<b>\$ 978,750</b>	<b>\$ 62,499</b>
<b>FUNDING DRAWN DOWN YTD</b>											
FUNDING DRAWN DOWN YTD	INDIRECT	10 ADULT	12 DW	11 YOUTH	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	40 WTP	470 Apprent Navigator
PY 23-24 Allocations		\$ 117,000	\$ -	\$ -	\$ 120,977	\$ 40,302	\$ -	\$ -	\$ -	\$ 133,511	\$ 45,100
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		\$ 286,364	\$ 869,768	\$ 327,777	\$ 81,565	\$ 54,168	\$ 23,647	\$ 23,347	\$ 235,912	\$ 146,600	\$ -
<b>TOTAL</b>		<b>\$ 403,364</b>	<b>\$ 869,768</b>	<b>\$ 327,777</b>	<b>\$ 202,542</b>	<b>\$ 94,470</b>	<b>\$ 23,647</b>	<b>\$ 23,347</b>	<b>\$ 235,912</b>	<b>\$ 280,111</b>	<b>\$ 45,100</b>
<b>% of Total Budgeted Funding Received</b>		<b>30.86%</b>	<b>98.44%</b>	<b>33.56%</b>	<b>47.63%</b>	<b>27.13%</b>	<b>77.44%</b>	<b>57.34%</b>	<b>48.95%</b>	<b>28.62%</b>	<b>0.00%</b>
<b>EXPENDITURES</b>											
<b>Administrative</b>	<b>\$ -</b>	<b>\$ 28,810</b>	<b>\$ 108,795</b>	<b>\$ 10,943</b>	<b>\$ 37,874</b>	<b>\$ 15,498</b>	<b>\$ 2,299</b>	<b>\$ 2,192</b>	<b>\$ 30,724</b>	<b>\$ 42,122</b>	<b>\$ 5,728</b>
Salaries and Benefits	\$ 211,852	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 121,575	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (333,427)	\$ 152,597	\$ 17,485	\$ 10,943	\$ 5,398	\$ 15,498	\$ 2,299	\$ 2,192	\$ 30,724	\$ 42,122	\$ 5,728
Reclassification	\$ -	\$ (123,787)	\$ 91,310	\$ -	\$ 32,477	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Program Training</b>	<b>\$ -</b>	<b>\$ 264,215</b>	<b>\$ 760,973</b>	<b>\$ 415,320</b>	<b>\$ 118,801</b>	<b>\$ 103,786</b>	<b>\$ 20,723</b>	<b>\$ 21,179</b>	<b>\$ 201,339</b>	<b>\$ 277,005</b>	<b>\$ 36,723</b>
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 339,025	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 129,406	\$ 513,606	\$ 56,118	\$ 10,436	\$ 12,062	\$ 64,861	\$ 3,282	\$ 3,857	\$ 131,629	\$ 164,374	\$ 28,372
Contract Labor	\$ -	\$ 9,453	\$ 3,349	\$ -	\$ 13	\$ 8,803	\$ 7	\$ 7	\$ 15,796	\$ 14,119	\$ 333
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,250	\$ -
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,971	\$ -
Support Services ITA	\$ -	\$ 3,755	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ 106,919	\$ 20,305	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 75	\$ -
Training-OJT	\$ -	\$ 123,235	\$ 7,175	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 1,171	\$ 4,344	\$ 640	\$ 716	\$ 1,823	\$ 689	\$ 4,225	\$ 2,494	\$ 1,124	\$ 1,573	\$ 404
One Stop Shared Costs	\$ -	\$ 68,705	\$ 6,721	\$ 198	\$ 18,845	\$ 10,331	\$ 10,519	\$ 12,077	\$ 23,314	\$ 24,307	\$ 3,994
Other Operating Expenses	\$ 27,883	\$ 75,449	\$ 9,316	\$ 59,744	\$ 18,759	\$ 11,736	\$ 1,598	\$ 1,704	\$ 14,874	\$ 49,319	\$ 898
Allocated Program Indirect	\$ (158,460)	\$ 72,521	\$ 8,309	\$ 5,201	\$ 2,565	\$ 7,365	\$ 1,093	\$ 1,042	\$ 14,602	\$ 20,018	\$ 2,722
Reclassification	\$ -	\$ (713,772)	\$ 649,039	\$ -	\$ 64,734	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Expenditures</b>	<b>\$ 0</b>	<b>\$ 293,025</b>	<b>\$ 869,768</b>	<b>\$ 426,264</b>	<b>\$ 156,675</b>	<b>\$ 119,284</b>	<b>\$ 23,022</b>	<b>\$ 23,371</b>	<b>\$ 232,064</b>	<b>\$ 319,127</b>	<b>\$ 42,451</b>
<b>Funding Over/(under) expenditures</b>	<b>\$ 0</b>	<b>\$ 110,339</b>	<b>\$ -</b>	<b>\$ (98,487)</b>	<b>\$ 45,866</b>	<b>\$ (24,813)</b>	<b>\$ 625</b>	<b>\$ (24)</b>	<b>\$ 3,848</b>	<b>\$ (39,016)</b>	<b>\$ 2,649</b>
<b>YTD % of Budgeted Funds Expended</b>		<b>22.42%</b>	<b>98.44%</b>	<b>43.64%</b>	<b>36.85%</b>	<b>34.25%</b>	<b>75.40%</b>	<b>57.39%</b>	<b>48.15%</b>	<b>32.61%</b>	<b>0.00%</b>

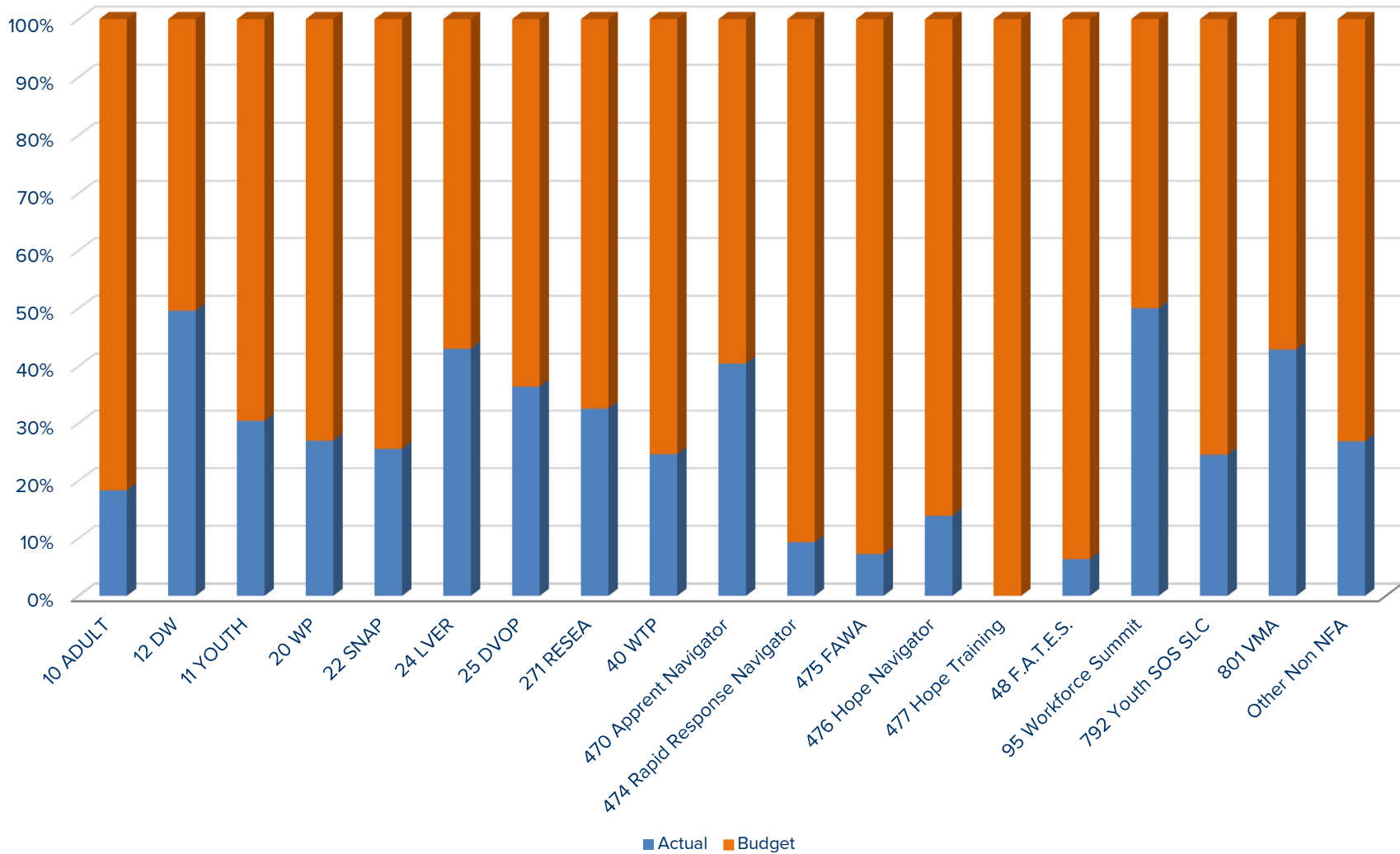
LWDB 20  
Summary of Funding and Expenditures  
As of December 30, 2023

PY 23-24 TOTAL AVAILABLE FUNDING	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	\$ 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	\$ -	\$ -	\$ -	\$ -
<b>TOTAL</b>	<b>\$ 32,060</b>	<b>\$ 1,571,026</b>	<b>\$ 73,283</b>	<b>\$ 104,686</b>	<b>\$ 59,265</b>	<b>\$ 140,000</b>	<b>\$ 149,230</b>	<b>\$ 12,024</b>	<b>\$ 60,046</b>
<b>FUNDING DRAWN DOWN YTD</b>									
PY 23-24 Allocations	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	\$ 4,700	\$ -	\$ 12,100	\$ -	\$ -	\$ 140,000	\$ -	\$ 9,018	\$ -
PY 23-24 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 27,220
Additional Funds	\$ -	\$ -	\$ -	\$ -	\$ 156,308	\$ -	\$ 39,944	\$ -	\$ -
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 24-25	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 22-23	\$ -	\$ 131,441	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>TOTAL</b>	<b>\$ 4,700</b>	<b>\$ 131,441</b>	<b>\$ 12,100</b>	<b>\$ -</b>	<b>\$ 156,308</b>	<b>\$ 140,000</b>	<b>\$ 39,944</b>	<b>\$ 9,018</b>	<b>\$ 27,220</b>
<b>% of Total Budgeted Funding Received</b>	<b>14.66%</b>	<b>8.37%</b>	<b>16.51%</b>	<b>0.00%</b>	<b>263.74%</b>	<b>0.00%</b>	<b>26.77%</b>	<b>75.00%</b>	<b>45.33%</b>
<b>EXPENDITURES</b>									
Administrative	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
Administrative	\$ 435	\$ 16,689	\$ 1,606	\$ -	\$ 506	\$ 19,720	\$ 6,763	\$ -	\$ 2,722
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ 435	\$ 16,689	\$ 1,606	\$ -	\$ 506	\$ 19,720	\$ 6,763	\$ -	\$ 2,722
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Program Training</b>	<b>\$ 2,857</b>	<b>\$ 106,388</b>	<b>\$ 10,213</b>	<b>\$ -</b>	<b>\$ 3,538</b>	<b>\$ 120,280</b>	<b>\$ 41,637</b>	<b>\$ 9,018</b>	<b>\$ 19,191</b>
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 2,282	\$ 60,856	\$ 8,166	\$ -	\$ 1,891	\$ -	\$ 3,598	\$ -	\$ 8,344
Contract Labor	\$ 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	\$ 4	\$ 869	\$ 39	\$ -	\$ 9	\$ -	\$ -	\$ -	\$ 225
One Stop Shared Costs	\$ 51	\$ 10,601	\$ 763	\$ -	\$ 702	\$ -	\$ 1,689	\$ -	\$ 3,878
Other Operating Expenses	\$ 305	\$ 25,007	\$ 474	\$ -	\$ 552	\$ 110,909	\$ 1,404	\$ 9,018	\$ 5,451
Allocated Program Indirect	\$ 207	\$ 7,931	\$ 763	\$ -	\$ 241	\$ 9,372	\$ 3,214	\$ -	\$ 1,294
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Expenditures</b>	<b>\$ 2,857</b>	<b>\$ 123,077</b>	<b>\$ 11,819</b>	<b>\$ -</b>	<b>\$ 4,045</b>	<b>\$ 140,000</b>	<b>\$ 48,401</b>	<b>\$ 9,018</b>	<b>\$ 21,913</b>
<b>Funding Over/(under) expenditures</b>	<b>#VALUE!</b>	<b>\$ 8,364</b>	<b>\$ 281</b>	<b>\$ -</b>	<b>\$ 152,264</b>	<b>\$ -</b>	<b>\$ (8,457)</b>	<b>\$ -</b>	<b>\$ 5,307</b>
<b>YTD % of Budgeted Funds Expended</b>	<b>#VALUE!</b>	<b>7.83%</b>	<b>16.13%</b>	<b>0.00%</b>	<b>6.82%</b>	<b>0.00%</b>	<b>32.43%</b>	<b>75.00%</b>	<b>36.49%</b>

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

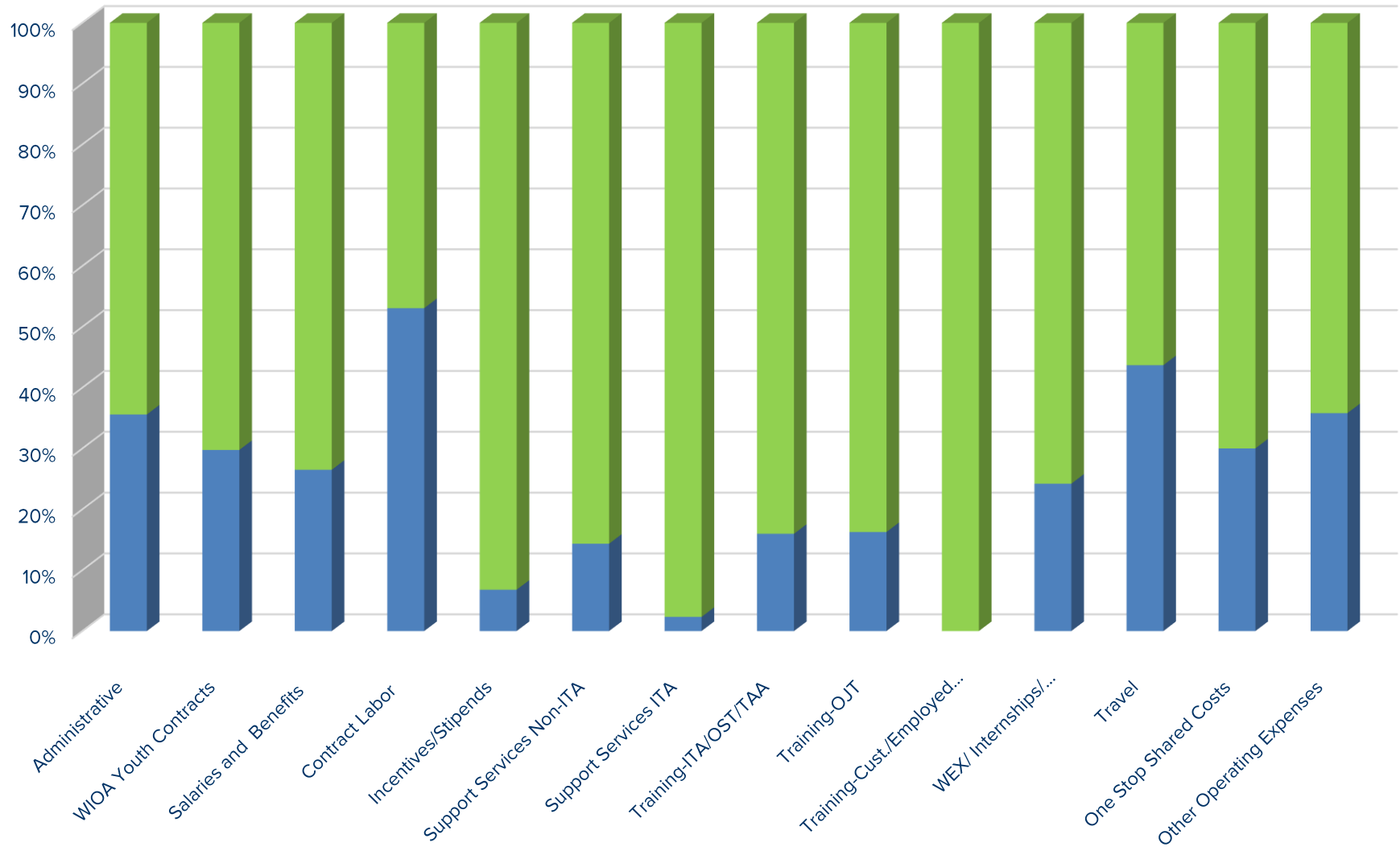
PY 23-24 TOTAL AVAILABLE FUNDING	YEAR TO DATE TOTALS			
PY 23-24 Allocations		\$	6,052,509	
PY 23-24 Supplemental		\$	164,384	
Unrestricted Funds Earned this year		\$	60,046	
Additional Funds		\$	149,230	
Retained by DEO for Merit Salaries		\$	(523,974)	
Carryforward to PY 24-25		\$	(3,344,949)	
Carryforward from PY 22-23		\$	5,179,694	
<b>TOTAL</b>		<b>\$</b>	<b>7,736,939</b>	
<b>FUNDING DRAWN DOWN YTD</b>				
	PY 23-24 Actual	PY 23-24 Budget	VARIANCE	% Expended
PY 23-24 Allocations	\$ 622,708	\$ 6,052,509	\$ 5,429,801	10.288%
PY 23-24 Supplemental	\$ -	\$ 164,384	\$ 164,384	0.000%
Unrestricted Funds Earned this year	\$ 27,220	\$ 60,046	\$ 32,826	45.332%
Additional Funds	\$ 196,252	\$ 149,230	\$ (47,022)	131.510%
Retained by DEO for Merit Salaries	\$ -	\$ (523,974)	\$ (523,974)	
Carryforward to PY 24-25	\$ -	\$ (3,344,949)	\$ (3,344,949)	
Carryforward from PY 22-23	\$ 2,180,589	\$ 5,179,694	\$ 2,999,105	42.099%
<b>TOTAL</b>	<b>\$ 3,026,769</b>	<b>\$ 7,736,939</b>	<b>\$ 4,710,170</b>	<b>39.121%</b>
<b>% of Total Budgeted Funding Received</b>	<b>39.12%</b>			
<b>EXPENDITURES</b>				
	PY 23-24 Actual	PY 23-24 Budget	VARIANCE	% Expended
<b>Administrative</b>	<b>\$ 333,427</b>	<b>\$ 603,121</b>	<b>\$ 269,694</b>	<b>55.28%</b>
Salaries and Benefits	\$ 211,852	\$ 515,350	\$ 303,498	41.11%
General and Administrative	\$ 121,575	\$ 86,486	\$ (35,089)	140.57%
Allocated Indirect Costs	\$ (0)	\$ 1,284	\$ 1,284	
Reclassification	\$ (0)	\$ -	\$ (0)	
Travel	\$ -	\$ -	\$ -	
<b>Program Training</b>	<b>\$ 2,533,188</b>	<b>\$ 7,132,970</b>	<b>\$ 4,599,782</b>	<b>35.5%</b>
WIOA Youth Contracts	\$ 339,025	\$ 800,000	\$ 460,975	42.4%
Salaries and Benefits	\$ 1,203,139	\$ 3,334,621	\$ 2,131,482	36.1%
Contract Labor	\$ 53,065	\$ 46,903	\$ (6,161)	113.1%
Internship	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ 1,250	\$ 17,126	\$ 15,876	7.3%
Support Services Non-ITA	\$ 1,971	\$ 11,759	\$ 9,788	16.8%
Support Services ITA	\$ 3,855	\$ 161,500	\$ 157,645	2.4%
Training-ITA/OST/TAA	\$ 127,299	\$ 668,415	\$ 541,116	19.0%
Training-OJT	\$ 130,410	\$ 670,424	\$ 540,013	19.5%
Training-Cust./Employed Worker	\$ -	\$ 78,000	\$ 78,000	0.0%
WEX/ Internships/ Participant Wages	\$ 31,733	\$ 99,226	\$ 67,493	32.0%
Travel	\$ 20,348	\$ 26,215	\$ 5,867	77.6%
One Stop Shared Costs	\$ 196,695	\$ 458,387	\$ 261,692	42.9%
Other Operating Expenses	\$ 424,397	\$ 760,393	\$ 335,996	55.8%
Allocated Program Indirect	\$ 0	\$ 0	\$ -	
Reclassification	\$ 0	\$ -	\$ 0	
<b>Total Expenditures</b>	<b>\$ 2,866,615</b>	<b>\$ 7,736,091</b>	<b>\$ 4,869,476</b>	<b>37.1%</b>
<b>Funding Over/(under) expenditures</b>	<b>\$ 160,154</b>			
<b>YTD % of Budgeted Funds Expended</b>	<b>37.05%</b>			

## Budget to Actual Expenditures by Program as of December 31, 2023



## Budget to Actual by Expenditure Category as of December 31, 2023

■ PY 23-24 Actual   ■ PY 23-24 Budget



## AGENDA ITEM SUMMARY

<b>Title</b>	2022-IRS Form 990 Tax Return Optimal Use of Resources
<b>Strategic Plans/Goals</b>	Optimal Use of Resources
<b>Policy/Plan/Law</b>	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's
<b>Action Requested</b>	Review and Approve Acceptance of 2022-IRS Form 990 Tax Return
<b>Background</b>	<p>The IRS Form 990 (Return of Organization Exempt from Income Tax) is designed to provide:</p> <ul style="list-style-type: none"> <li>• Transparency of activities</li> <li>• A realistic picture of the organization and its operation</li> <li>• A basis for comparing the organization to similar organizations</li> <li>• Tax Compliance</li> </ul> <p>The 2022-IRS Form 990 consists of a core form and supplemental schedules. There are questions concerning Board governance and policies and the IRS strongly recommends that all voting members of the governing body receive a copy of the organization's final IRS Form 990 Tax Return prior to its filing.</p>
<b>Staff Recommendations</b>	Review and Approve Acceptance of 2022-IRS Form 990 Tax Return
<b>Supporting Material</b>	Link to 2022 IRS Form 9090 Tax Return: <a href="https://careersourcerc.com/wp-content/uploads/2024/02/WFDB-Treasure-Coast-2022-Draft-Form-990-for-Mgmt-Review-201853.pdf">https://careersourcerc.com/wp-content/uploads/2024/02/WFDB-Treasure-Coast-2022-Draft-Form-990-for-Mgmt-Review-201853.pdf</a>
<b>Board Staff</b>	<p>Lisa Delligatti CFO <a href="mailto:ldelligatti@careersourcerc.com">ldelligatti@careersourcerc.com</a> (866) 482-4473 ext. 430</p>

## AGENDA ITEM SUMMARY

<b>Title</b>	Department of Commerce (FLORIDACOMMERCE) - Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs from July 1, 2023 - June 30, 2024
<b>Strategic Plans/Goals</b>	Operational Intelligence
<b>Policy/Plan/Law</b>	CareerSource Florida Administrative Policy Number 118
<b>Action Requested</b>	Review and Approve the FLORIDACOMMERCE - Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs from July 1, 2023 - June 30, 2024
<b>Background</b>	FLORIDACOMMERCE and the State Workforce Development Board will continue to grant the authority, on behalf of the Governor, to allow Local Workforce Development Boards to transfer up to an including 100 percent of the funds allocated to local areas for adult activities for expenditure on dislocated worker activities, and up to 100 percent of funds allocated to local areas for dislocated worker activities for expenditures on adult activities. Local Workforce Development Boards are required to ensure any transfer of funds between WIOA programs complies with federal law and to record and document their use and application of local funds.
<b>Staff Recommendations</b>	Review and Approve FLORIDACOMMERCE - Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs from July 1, 2023 - June 30, 2024
<b>Supporting Material</b>	FLORIDACOMMERCE - Prior Approval Transfer Request Form - WIOA Adult 2023 and Dislocated Worker (DW) 2023 funding for Programs from July 1, 2023 - June 30, 2024
<b>Board Staff</b>	Lisa Delligatti CFO <a href="mailto:ldelligatti@careersourcerc.com">ldelligatti@careersourcerc.com</a> (866) 482-4473 ext. 430



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

**LWDB Number and Name (Requestor):** SWDB20 CareerSource Research Coast

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

**Adult and Dislocated Worker Transfer Request**

Program Year	Program	Total Award Amount	Amount of Adult Requested to be Spent on DW	Percentage of Adult Requested to be Spent on DW	Amount of DW Requested to be Spent on Adult	Percentage of DW Requested to be Spent on Adult
2022	DW	1,042,420.00	0.00	0	889,412.80	85%

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

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

LWDB 20 anticipates to fully expend the WIOA Adult - 2023 funding prior to June 2024. The previous Prior Approval Transfer Request completed was approved for \$788,000. LWDB20 requests the approval of an additional \$101,412.80 in WIOA DW 2022 funding to be utilized for WIOA Adult 2023 expenditures, for a total transfer of \$889,412.80. Based on the historical data for Dislocated Workers in our LWDA, this transfer will allow service to additional WIOA Adult participants.

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

Website, social media such as Facebook, Instagram, LinkedIn and Radio advertising, job fairs, flyers and print advertising. In addition, we perform outreach through our community partners and training providers.

**Labor market conditions contributing to the need for the transfer:**

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

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

LWDB20 DW - 2022 funding would allow for an estimated 94 DW participants to be served in PY23-24, based on the prior program year cost per DW participant. However, given the historical number of DW participants served, this transfer request would allow for an estimated additional 223 WIOA Adult participants to receive career/basic services, training and individualized services for PY23-24 while continuing to serve an additional 9 DW participants, which is a 64% increase from PY22-23.



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

I certify the following:

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

I certify the above information is true and correct.

\_\_\_\_\_  
Signature of Board Chair

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date

# Agenda Item 7

## AGENDA ITEM SUMMARY

Title	LWDB 20 Primary Indicators of Performance for PY 2023-2024 2nd Quarter (Tentative)
Strategic Plans/Goals	Clear, Credible, and Trustworthy Commitments and Projects
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA) Title I Programs and Title III Wagner-Peyser (WP) Act; Training and Employment Guidance Letter No. 09-20
Action Requested	None - Information Only
Background	<p>The State of Florida must negotiate and agree upon performance levels for WIOA, and WP programs funded by the United States Department of Labor, Employment, and Training Administration. Once the state levels are established, the Department of Commerce (FLORIDACOMMERCE) must negotiate and reach agreements with the Local Workforce Development Boards for their local performance targets.</p> <p>Staff will review CareerSource Research Coast's performance for the 2nd quarter of PY2023-2024.</p>
Staff Recommendations	None - Information Only
Supporting Material	LWDB 20 PY2023-2024 2nd Quarter Performance
Board Staff	<p>Lisa Delligatti            Director of Programs  <a href="mailto:ldelligatti@careersourcerc.com">ldelligatti@careersourcerc.com</a>            (866) 482-4473 ext. 430</p>

## AGENDA ITEM SUMMARY

<b>Title</b>	LWDB20 - FLORIDACOMMERCE Preliminary Monitoring Review Summary PY 2023-2024
<b>Strategic Plans/Goals</b>	Effective Utilization of Current and Timely Operational Intelligence for all Stakeholders
<b>Policy/Plan/Law</b>	DEO Grantee/Sub-Grantee Agreement, CSRC Administrative Plan
<b>Action Requested</b>	None - Information Only
<b>Background</b>	<p>The CSRC is responsible for monitoring all functions of 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 in a timely manner, resulting in the prevention and/or elimination of any misuse of funds.</p> <p>Per State requirements, CSRC conducts self or internal monitoring on a scheduled basis. Various staff members with programmatic experience are utilized to ensure that programs are in compliance with federal/state/local regulations and policies. Internal monitoring is also completed to track performance, reach goals and provide for continuous improvement.</p> <p>FLORIDACOMMERCE also completes an annual programmatic quality assurance review of all CareerSource Research Coast programs and special projects, including career center operations.</p> <p>CSRC staff will provide the Committee with the preliminary results of the monitoring completed by the Florida Department of Commerce (FLORIDACOMMERCE) during the week of January 16-22, 2024.</p>
<b>Staff Recommendations</b>	None - Informational Only
<b>Supporting Material</b>	LWDB20 FLORIDA COMMERCE Preliminary Monitoring Review Summary PY 2023-2024
<b>Board Staff</b>	Brian Bauer President/CEO <a href="mailto:bbauer@careersourcerc.com">bbauer@careersourcerc.com</a> (866) 482-4473 ext. 418



**Executive Summary:** For the review period of October 1, 2022 to September 30, 2023, programmatic monitoring activities included assessing CSRC’s program operations, management practices, system protocols, and internal controls, utilizing FloridaCommerce’s programmatic monitoring tools, to determine if CSRC operated in compliance with each of the programs’ laws, regulations, state and local plans, policies and guidance, and any contract or agreement terms. Monitoring also included sample testing of randomly selected participant case file records from each of the workforce programs reviewed. An acronym list is located following the table below.

Programmatic issues identified in the report are categorized as findings, issues of noncompliance, and observations based on a scale of high, medium, and low risk probabilities. High, medium, and low risk factors are used to separate issues that present more of a threat to program operations including issues that may potentially impact the fiscal integrity or delivery of services within program operations. While no material issues or weaknesses came to the reviewers’ attention other than those contained in the following summary, there is no assurance that other issues do not exist. *NOTE: A voluntary 10-day response period is available following issuance of this summary for CSRC to provide additional documentation which may or may not lead to resolution of issues or instances on the final report.*

**Preliminary Review Issues Summary:**

<i>Program</i>	<i>Cases Reviewed</i>	<i>Findings</i>	<i>Other Non-Compliance Issues (ONIs)</i>
Welfare Transition (WT)	18		
Supplemental Nutrition Assistance Program – Employment & Training (SNAP E&T)	18		
Management Process Review			
Workforce Innovation and Opportunity Act (WIOA) and Special Projects	35	1	
Rapid Response			
Wagner-Peyser (WP)	50		2
Jobs for Veterans State Grant (JVSG)	30	1	1
Management Information Systems (MIS) & Security			
Complaint System	45	1	
Migrant Seasonal Farmworker (MSFW)	12	2	3
	<b>Totals</b>	<b>5</b>	<b>6</b>

Acronyms					
ABAWD	Abled Bodied Adult without Dependents	FMA	Bureau of Financial Monitoring and Accountability	OST	Occupational Skills Training
AP	Administrative Policy	FY	Fiscal Year	POS	Priority of Service
CAP	Corrective Action Plan	IEP	Individual Employment Plan	PY	Program Year
CFR	Code of Federal Regulations	IRP	Individual Responsibility Plan	RESEA	Reemployment Services and Eligibility Assessment Program
CSRC	CareerSource Research Coast	IT	Information Technology	RR	Rapid Response
DCF	Department of Children and Families	ITA	Individual Training Account	SNAP E&T	Supplemental Nutrition Assistance Program Employment and Training
DVOP	Disabled Veterans Outreach Program	IWT	Incumbent Worker Training	SMA	State Monitor Advocate
DWG	Disaster Recovery Dislocated Worker Grant	JPR	Job Participation Rate	S.M.A.R.T	Specific, Measurable, Attainable, Realistic, and Time-Bound
DW	Dislocated Worker	JVA	Jobs for Veterans Act	SYEP	Summer Youth Employment Program
EDP	Employability Development Plan	JVSG	Jobs for Veterans State Grant	TAA	Trade Adjustment Assistance
EEO	Equal Employment Opportunity	LMI	Labor Market Information	TANF	Temporary Assistance for Needy Families
ES	Employment Service	LVER	Local Veterans Employment Representative	TCA	Temporary Cash Assistance
ETA	Employment and Training Administration	LWDB	Local Workforce Development Board	TEGL	Training and Employment Guidance Letter
F.A.C	Florida Administrative Code	MIS	Management Information System	U.S.C.	United States Code
FCDP	Farmworker Career Development Program	MOU/IFA	Memorandum of Understanding & Infrastructure Funding Agreement	WE	Work Experience
FG	Final Guidance	MSFW	Migrant and Seasonal Farmworker	WFS	Workforce Services
FLC	Foreign Labor Certification	MSG	Measurable Skills Gains	WIOA	Workforce Innovation and Opportunity Act
FLSA	Fair Labor Standards Act	ONI	Other Noncompliance Issue	WP	Wagner-Peyser
FloridaCommerce	Florida Department of Commerce	OSPS	Bureau of One-Stop and Program Support	WSA	Work Search Activity
F.S.	Florida Statutes	OSST	One-Stop Service Tracking	WT	Welfare Transition

**\*This acronym table reflects all acronyms that have been used in the PY 2023-2024 monitoring review cycle. All acronyms may not be used in this report.**

**Corrective Action Plan (CAP):** The following general CAP requirements will need to be developed, implemented, and an LWDB response is expected post-issuance of the report to address issues identified below for each Finding, Other Non-Compliance Issue (ONI), and any additional program specific issues identified in the report. The general CAP requirements to be addressed are as follows: copies of updated local operating procedures/policies addressing the requirement; a monitoring schedule showing timeframes activities/services to be monitored; documentation of completed or intended staff training/retraining, including dates, agendas, and roster (as applicable); and written communication to staff regarding the issues.

<b>WT</b>	<b>Total Cases: 18</b>
The review did not reveal any Findings, Other Noncompliance Issues or Observations.	

<b>SNAP E&amp;T</b>						<b>Total Cases: 18</b>	
Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions
1.The SNAP Self-Attestation Form for Transportation Reimbursement was not updated as required for two participants. When brought to their attention, CSRC updated the form immediately.	<b><u>SNAP State Plan; Memorandum dated February 3, 2023 titled The Supplemental Nutrition Assistance Program Employment and Training Updates.</u></b>	N/A	N/A	N/A	N/A	Y	CSRC must provide an assurance that forms are updated timely. CSRC must also provide documentation of the review of all files opened after the February policy revision and CSRC staff's attempt to contact and initiate the signature of the new form, if the identified case files are still open.
<b>Totals – SNAP E&amp;T</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	

<b>Management Process Review</b>							
Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions
<b>Local Board Governance / Merit Staffing Structure / Ethics / Financial Disclosure / Sector Strategies / Collection of Demographic Data</b>							
The review did not reveal any Findings, Other Noncompliance Issues or Observations.							
<b>Totals – Management Process Review</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	

<b>WIOA</b>						<b>Total Cases: 38</b>	
Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions
<b>Adult/Dislocated Worker (DW)</b>							
						<b>Cases: 22 (13 Adult/9 DW)</b>	

1. Training end dates as recorded in Employ Florida for 11 participants did not match the documentation retained in the participant's case file. Additionally, documentation in one participant's case file was for a previous WIOA application that was not recorded in Employ Florida.	<u>20 CFR 680.410-420 and .770-840; WIOA Section 122 (b)(1)(D), (b)(4)(A), (a)(3) and 134(c)(3); AP 009 and 90; and TEGL 19-16.</u>	N/A	N/A	N/A	N/A	Y	CSRC must ensure that activity beginning and end dates are recorded accurately, and timely in Employ Florida. Additionally, CSRC must ensure that services provided to a participant are documented to reflect the actual amount of the expenditure, a need for the service, is approved and allowable, and the service activity matches what is entered in Employ Florida.
<b>Youth</b>							<b>Cases: 13 (12 Out of School/1 In School)</b>
2. The credential attainment recorded in Employ Florida for one participant did not meet the definition of a nationally recognized credential.	<u>Federal Data Validation Requirements TEGL 10-16 Change 2; and WIOA Section 3(52) and 129 (c)(1)(C).</u>	N	Y	N/A	N/A	N/A	CSRC must ensure that credentials recorded in Employ Florida meet the definition of a nationally recognized credential that documents measurable technical or industry/occupational skills necessary to gain employment or advance within an occupation.
3. The OST activity for two participants was voided in Employ Florida after it was originally closed with successful completion.	<u>WIOA Section 129(c)(2)(D); and 20 CFR 681.540.</u>	N/A	N/A	N/A	N/A	Y	CSRC must ensure that services provided to a participant are documented to reflect the actual amount of the expenditure, a need for the service, is approved and allowable, and the service activity matches what is entered in Employ Florida.
<b>Special Projects</b>							<b>Cases: 3 (3 DW)</b>
<ul style="list-style-type: none"> <li>• PY23 Hurricane Ian DWG</li> </ul>							
The review did not reveal any Findings, Other Noncompliance Issues or Observations.							
<b>Totals - WIOA</b>		<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>2</b>	

<b>Rapid Response</b>							
Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions
1. Although a Local Operating Procedure (LOP) was developed for the Rapid Response program, the policy was missing the following components:	<u>20 CFR Part 639; TEGL 19-16; and AP 114.</u>	N/A	N/A	N/A	N/A	Y	CSRC must include a revision or plan to revise, with timelines, their local RR policy to include all mandatory

<p>A. The roles and duties of the career center staff.</p> <p>B. Other RR partners, including other local agencies, organizations and/or service providers.</p>							<p>components necessary to properly administer the RR program.</p>
<p>2. The informational packet distributed to affected workers did not include information on the impact on health coverage after a layoff.</p>	<p><b><u>20 CFR 682.300(b)(1); TEGL 19-16; and AP 114.</u></b></p>	<p>N/A</p>	<p>N/A</p>	<p>N/A</p>	<p>N/A</p>	<p>Y</p>	<p>CSRC must ensure the provision of information regarding alternative health coverage options that may be available after a layoff are provided to affected workers. Options may include Cobra, Affordable Care Act plans, and/or short-term medical insurance. If additional information is requested by the affected worker, staff should refer them to their Human Resource department.</p> <p>The link below is provided to assist with sharing information on possible health coverage options after a layoff.  <a href="#">Health care options following a lay off</a></p>
<p>3. The informational packet distributed to employers did not address the needs of businesses in transition across the business lifecycle to include layoff aversion strategies.</p>	<p><b><u>20 CFR 682.300(b)(2); TEGL 19-16; and AP 114.</u></b></p>	<p>N/A</p>	<p>N/A</p>	<p>N/A</p>	<p>N/A</p>	<p>Y</p>	<p>CSRC must ensure that informational material provided to employers covers reactive strategies as well as proactive strategies as needed across the business cycle.</p> <p>Proactive strategies may include but not limited to information such as: Short-Time Compensation and, Incumbent Work Training and feasibility studies.</p>
<p>4. The LWDB has not formulized an early warning network system.</p>	<p><b><u>20 CFR 682.330 (g); and TEGL 19-16.</u></b></p>	<p>N/A</p>	<p>N/A</p>	<p>N/A</p>	<p>N/A</p>	<p>Y</p>	<p>The Early Warning Network is a proactive measure to develop connections and partnerships for the purpose of establishing quick alerts of potential dislocations and to address the impending needs of employers and affected workers. It is strongly recommended that the Local Rapid Response Coordinator begin formulizing and developing an early warning</p>



							network system by cultivating strong partnerships with their local Economic Development Council, Chamber of Commerce and Small Business Development Centers.
5. The Rapid Response program lack systems and processes to anticipate, prepare for, and manage economic changes.	<b><u>20 CFR 682.330 (g); and TEGL 19-16.</u></b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>Y</b>	CSRC is encouraged to develop a system to track outcomes and performance data and information related to the activities of the rapid response program.  Additionally, CSRC may want to utilize the EconoVue platform on a regular basis. Last log in by staff is documented as March of 2023.
<b>Totals – Rapid Response</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>5</b>	

<b>WP</b>							<b>Total Cases: 50</b>
<b>Issue</b>	<b>Applicable References</b>	<b>Prior Year Finding</b>	<b>Current Year Finding</b>	<b>Prior Year ONI</b>	<b>Current Year ONI</b>	<b>Observation</b>	<b>Compliance Actions</b>
<b>WP - General</b>							<b>Cases: 45</b>
1. A referral listed on the “Referrals Pending Review” list had not been reviewed by staff by the deadline.	<b><u>AP 099</u></b>	<b>N/A</b>	<b>N/A</b>	<b>N</b>	<b>Y</b>	<b>N/A</b>	CSRC must provide an assurance that referrals on the “Referrals Pending Review” list are reviewed within 72 hours.
2. A couple job seekers had service codes recorded in Employ Florida without the correct documentation to support the service.	<b><u>TEGL 19-16; Wagner-Peyser Act of 1933, as amended; 20 CFR 651.10, 652.07, 652.3; AP 096 and 115; Employ Florida Service Code Guide.</u></b>	<b>N/A</b>	<b>N/A</b>	<b>N</b>	<b>Y</b>	<b>N/A</b>	CSRC must provide an assurance that services entered in Employ Florida match the type of service provided, have all required documentation, and correctly identify the actions taken.
<b>RESEA</b>							<b>Cases: 5</b>
The review did not reveal any Findings, ONIs, or Observations.							
<b>Credentialing</b>							
The review did not reveal any Findings, ONIs, or Observations.							
<b>Totals - WP</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>0</b>	

## MIS & Security

The review did not reveal any Findings, ONIs, or Observations.

### Totals – MIS and Security

0 0 0 0 0

## JVSG Total Cases: 30

Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions
<b>JVSG Participants <span style="float: right;">Cases: 15</span></b>							
1. One participant did not have an automated 089, nor did they receive a manual 189 (Priority of Service) activity code.	<u>20 CFR 1010; and AP 096, 102, and 111.</u>	N	Y	N/A	N/A	N/A	CSRC must provide documentation of the provision of priority of service in a case note for the participant if the participant's application is still open and active. CSRC must also provide an assurance that if there is no automatic priority of service notification on the current WP application activity history/service plan screen, staff must verbally provide priority of service, record the code 189 in Employ Florida and case note the provision.
2. One participant did not have a corresponding E53 (Veteran Advocacy) on the employer account for a V12 (Veteran Advocacy) activity code documented on the participant account within Employ Florida.	<u>AP 117.</u>	N/A	N/A	N	Y	N/A	CSRC must provide an assurance that LVERs will capture and document each Veteran Advocacy conducted by the LVER to ensure both participant and employer's accounts are accurate, and advocacy is being completed. CSRC must also provide an assurance that LVER will verify the employer has an active account in Employ Florida before documenting a V12 activity code on the participant's Employ Florida account.
<b>Local Veteran Employment Representative (LVER) <span style="float: right;">Cases: 15</span></b>							

3. Three employers FEIN listed in the employer's profile was not the same FEIN listed for the employer in SunBiz.	<b><u>AP 098; Employ Florida Terms of Use</u></b>	N/A	N/A	N/A	N/A	Y	CSRC must provide documentation of CSRC staff's efforts to verify the FEIN numbers if the employers are still open and active in Employ Florida. CSRC must also provide an assurance that any future employer FEIN entry into Employ Florida matches the FEIN in SunBiz, and that the LVER will review this information and correct it as needed.
4. Two employer's accounts are missing information within the E02 (Provided Job Fair Information) case note documentation.	<b><u>38 USC Ch 4104; VPL 03-14; and Employ Florida Employer Service Code Guide</u></b>	N/A	N/A	N/A	N/A	Y	CSRC must provide an assurance that employer activity codes are recorded during all future LVER activities and that a corresponding case note with required information is entered in the Employ Florida.
<b>Totals - JVSG</b>		<b>0</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>2</b>	

<b>ES Complaint System</b>							<b>Total Reviewed: 45</b>
<b>Issue</b>	<b>Applicable References</b>	<b>Prior Year Finding</b>	<b>Current Year Finding</b>	<b>Prior Year ONI</b>	<b>Current Year ONI</b>	<b>Observation</b>	<b>Compliance Actions</b>
1. A complaint log reporting two complaints was missing the WP related and date pending sections. The log did not indicate who the complaints were filed against. Additionally, the log did not contain the dates the complaints were referred to the enforcement agency for further investigation.	<b><u>20 CFR 658.410; Employment Service and Employment-Related Law Complaint System Handbook; FG 03-040.</u></b>	N	Y	N/A	N/A	N/A	CSRC must submit an assurance that, complaint logs will be properly completed and reviewed, before they are submitted to FloridaCommerce. The assurance must also indicate that all complaint logs will be submitted to the SMA by the fifth working day after the end of the quarter in which the complaint was taken.
<b>Totals – ES Complaint System</b>		<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	

<b>MSFW</b>	<b>Total Cases: 12</b>
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Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions
<b>MSFW Applications</b>							<b>Total Cases: 10</b>
1. Several MSFW applications were missing crops/crop codes listed on the Employ Florida Wagner-Peyser applications or in a case note.	<u>20 CFR 653; and FG 03-040.</u>	N/A	N/A	Y	Y	N/A	CSRC must provide an assurance that staff will review all MSFW applications recorded subsequent to the review and ensure the applications contain all necessary requirements.
<b>MSFW Job Orders</b>							<b>Total Job Orders: 2</b>
2. One agricultural job order did not contain the specific days and hours to be worked in the job description.	<u>20 CFR 653; and FG 03-040.</u>	N/A	N/A	N	Y	N/A	CSRC must provide an assurance that staff will review all agricultural job orders recorded subsequent to the review and ensure the job orders contain all necessary description requirements.
<b>MSFW General</b>							
3. MSFW Service Level Indicators-The Vero Beach significant office did not meet the Equity Ratio Indicators and Minimum Service Level Indicators during the review period. The Equity Ratio Indicators not met were received individualized career service. In addition, the office did not meet the Minimum Service Level Indicators of median earnings of MSFWs in unsubsidized employment and MSFWs placed in a job.  Note: Another MSFW Service Level Indicators Report will be pulled within 30-days following the review. The Report may/may not yield changes to the Preliminary Review Exit Summary.	<u>20 CFR 653; FG 03-040; and Local Workforce Services Plan.</u>	Y	Y	N/A	N/A	N/A	CSRC must submit an assurance that outreach staff will provide MSFWs with staff-assisted career center services, including referrals and placements to employment. CSRC must also provide an assurance the MSFW Service Level Indicators Report will be monitored regularly to identify service gaps.

<p>4. MSFW Outreach Services- During the review period, there was no coordination and documentation of outreach activities with the MSFW grantee partner. Coordinated outreach activities must be reported to FloridaCommerce through monthly outreach reports.</p>	<p><b><u>20 CFR 653.107; WIOA Unified Plan; Local Workforce Services Plan; FG 03-040</u></b></p>	<p><b>N</b></p>	<p><b>Y</b></p>	<p><b>N/A</b></p>	<p><b>N/A</b></p>	<p><b>N/A</b></p>	<p>CSRC must provide an assurance of efforts that will be taken to strengthen the relationship with the NFJP Grantee partner. CSRC must also provide an assurance that joint outreach activities will be recorded and reported in MSFW Outreach Services Reports.</p>
<p>5. MSFW Outreach Reports- A couple of MSFW Monthly Outreach Reports and Daily Outreach Logs were submitted late to the State Monitor Advocate for reporting purposes.</p>	<p><b><u>20 CFR 653.107; FG 03-040; WIOA Unified Plan</u></b></p>	<p><b>N</b></p>	<p><b>N</b></p>	<p><b>Y</b></p>	<p><b>Y</b></p>	<p><b>N/A</b></p>	<p>CSRC must provide an assurance that MSFW Monthly Outreach Reports will be submitted timely to the SMA for reporting purposes, subsequent to the review</p>
<p><b>Totals – MSFW</b></p>		<p><b>1</b></p>	<p><b>2</b></p>	<p><b>2</b></p>	<p><b>3</b></p>	<p><b>0</b></p>	

# Agenda Item 9

## AGENDA ITEM SUMMARY

<b>Title</b>	Local Workforce Development Board Membership
<b>Strategic Plans/Goals</b>	Effective Utilization of Current and Timely Operational Intelligence for all Stakeholders
<b>Policy/Plan/Law</b>	Workforce Innovation and Opportunity Act (WIOA)/By-Laws-Role of LWDB's
<b>Action Requested</b>	Establish Ad Hoc Search Committee for New Board Membership
<b>Background</b>	The Governor, in partnership with CareerSource Florida (CSFL) Board of Directors, establish criteria for use by the Chief Local Elected Officials (CLEO) for appointment of members to the LWDB's in accordance with WIOA sec. 107(b)(2). In following the guidance set forth in the TC Workforce Consortium's Interlocal Agreement, the CLEO shall be the appointing authority for the members of the LWDB's.
<b>Staff Recommendations</b>	Establish Ad Hoc Committee for the replacement of current vacancies as set forth in the By-Laws.
<b>Supporting Material</b>	None - Information Only
<b>Board Staff</b>	Brian Bauer President/CEO <a href="mailto:bbaueri@careersourcerc.com">bbaueri@careersourcerc.com</a> (866) 482-4473 ext. 418

## AGENDA ITEM SUMMARY

<b>Title</b>	Regional Planning Area Designation Request
<b>Strategic Plans/Goals</b>	Optimal Use of Resources
<b>Policy/Plan/Law</b>	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's
<b>Action Requested</b>	None - Information Only
<b>Background</b>	As per CareerSource Florida Strategic Policy 2023.09.19.A.1, the request to be identified as a regional planning area (planning region) requires that the local workforce development boards have relevant relationships as evidenced by labor markets, economic development areas, education and training resources, population centers, commuting patterns, industrial composition, location quotients, labor force conditions, and geographic boundaries. If the request for designation is approved, the local workforce development boards within the regional planning area will be required to engage in a regional planning process that will produce a Regional Plan to be added as an addendum to each local workforce development board plan per FloridaCommerce Regional Planning Instructions.
<b>Staff Recommendation</b>	None - Information Only
<b>Supporting Material</b>	Local Workforce Development Board Regional Planning Area Application Letter, PowerPoint: Regional Planning - Data Book for Designation Requests
<b>Board Staff</b>	Brian Bauer President/CEO <a href="mailto:bbauer@careersourcerc.com">bbauer@careersourcerc.com</a> (866) 482-4473 ext. 418

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<b>Request for Regional Planning Area Identification</b>	
Proposed Name of Planning Region: Palm Beach-Treasure Coast Regional Planning Area	
Local Workforce Development Boards included (Two or more contiguous boards): CareerSource Research Coast and CareerSource Palm Beach County	
Date of Submission: 2/6/2024	
Contact Person Name(s):  Brian Bauer, President/CEO	Phone: 1-866-482-4473 ext. 418  Email Address: bbauer@careersourcerc.com

The request for designation requires that the local workforce development boards have relevant relationships as evidenced by labor markets, economic development areas, education and training resources, population centers, commuting patterns, industrial composition, location quotients, labor force conditions, and geographic boundaries. By signing below, the local chief elected officials and the local workforce development board executive directors certify that the local areas request designation as a qualified regional planning area per CareerSource Florida Strategic Policy 2023.09.19.A.1. If the request for designation is approved, the local workforce development boards within the regional planning area will be required to engage in a regional planning process that will produce a Regional Plan to be added as an addendum to each local workforce development board plan per FloridaCommerce Regional Planning Instructions.

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*Signature Page*

<b>CareerSource Research Coast Executive Director</b>	
Name: Brian Bauer	
<small>DocuSigned by:</small>	
Signature:	<i>Brian K. Bauer</i>
<small>81CEFB6456304CC</small>	
Date of Submission: 2/6/2024	

<b>Treasure Coast Workforce Consortium Chair (CLEO) - CareerSource Research Coast</b>	
Name and Title: Commissioner Jamie Fowler	County: BOCC St. Lucie County
<small>DocuSigned by:</small>	
Signature:	<i>Jamie Fowler</i>
<small>0DEE40086419455...</small>	
Date: 2/6/2024   9:13 AM EST	

*Signature Page*

CareerSource Palm Beach County Executive Director	
Name: Julia Dattolo	
Signature:	<small>DocuSigned by:</small> <i>Julia Dattolo</i>
Date of Submission:	<small>91D02ABE6EF04B0...</small> 1/29/2024   11:47 AM PST

Local Chief Elected Official – CareerSource Palm Beach County	
Name and Title: Commissioner Gregg Weiss	County: Palm Beach
Signature:	<small>DocuSigned by:</small> <i>Gregg J. Weiss</i> <small>CSA</small>
	Date: 1/29/2024   2:54 PM EST

## **Support Documentation for the Request for Regional Planning Area Identification**

Below is a narrative evidencing the current relationships amongst the counties and local workforce development areas within the proposed regional planning area (WIOA planning region). This supportive documentation follows requirements for regional planning area identification in line with FloridaCommerce's Administrative Policy "Regional Planning Area Identification and Requirements" approved by the CareerSource Florida State Board of Directors on December 12<sup>th</sup>, 2023.

CareerSource Research Coast (Indian River, St. Lucie, and Martin Counties) and CareerSource Palm Beach County (Palm Beach County) are requesting identification as the Palm Beach-Treasure Coast Regional Planning Area. Per the Florida Workforce Transformation Plan, CareerSource Florida in collaboration with the Governor's Reimaging Education and Career Help (REACH) Office, the Florida Department of Commerce (FloridaCommerce), and Local Workforce Development Boards, must ensure that all local areas in the state are a part of planning region. The LWDBs identified in this proposed planning region are initiating the process to become one of the first official regional planning areas in the State of Florida.

Per the FloridaCommerce Administrative Policy, this supportive documentation includes the following information presented in the same order as the Administrative Policy:

1. Planning regions must include at least two contiguous local areas within Florida.
2. Information pertaining to the following for the proposed planning region:
  - a. Shared labor market
  - b. Shared common economic development area
  - c. Possess federal and non-federal resources including appropriate education and training institutions to administer activities under WIOA subtitle B
  - d. Population centers and population changes
  - e. Commuting patterns
  - f. Industrial composition and location quotients
  - g. Labor force conditions
  - h. Geographic boundaries
3. Signatures of all the pertinent CLEOs of the units of local government that will make up the proposed planning region to demonstrate consensus of all of the units of local government involved.

This request with supportive documentation will be submitted to FloridaCommerce via email at [LWDBGovernance@commerce.fl.gov](mailto:LWDBGovernance@commerce.fl.gov). Please reach out to any of the listed contacts if you have any questions regarding the information included in this request for designation as a planning region. In addition, the LWDB executive directors within this coalition understand the regional planning requirements outlined in CareerSource Florida Strategic Policy 2023.09.19.A.1 that would ensue if identified as a regional planning area. The executive directors of this coalition commit to a collaborative process to produce a regional plan.

**Shared labor market:** Below is a table of the most recent US Bureau of Labor Statistics’ defined metropolitan statistical areas that are incorporated within the four counties in the proposed regional planning area.

County	LWDB	Metropolitan Statistical Area
Indian River	Research Coast	Sebastian-Vero Beach
Martin	Research Coast	Port St. Lucie
Palm Beach County	Palm Beach County	Miami-Fort Lauderdale-Pompano Beach (AND West Palm Beach-Boca Raton-Boynton Beach Metropolitan Division)
St. Lucie	Research Coast	Port St. Lucie

CareerSource Research Coast includes Port St. Lucie and the Sebastian-Vero Beach MSA. Palm Beach County is a part of the Miami-Fort Lauderdale-Pompano Beach MSA but also includes the West Palm Beach-Boca Raton-Boynton Beach Metropolitan Division – which is the northernmost portion of the Miami MSA.

While the proposed regional planning area includes multiple MSAs, there are further relationships evidenced by economic development areas, similar industrial composition, commuting patterns, and other features that evidence an Atlantic coast region capable of planning and leveraging similar experiences to amplify workforce development efforts. For the sake of regional planning, this area encapsulates a shared labor market.

**Common economic development area:** Below is a table of selection of economic development organizations that are represented amongst the four counties of the two local workforce development areas in the proposed regional planning area. The table includes information on the Enterprise Florida Region of each county, the US Economic Development Administration (EDA) Economic Development District (EDDs), and three columns of additional economic development organizations (EDOs) that are located within the two local workforce development areas. While Enterprise Florida is currently transitioning as an organization (SelectFlorida was formed in 2023 as Direct Support Organization for FloridaCommerce to promote international trade and investment), the regional geographies remain unchanged in the transition from Enterprise Florida to SelectFlorida.

County	LWDB	Enterprise Florida Regions	EDA EDDs	Additional EDO	Second Additional EDO	Third Additional EDO
Indian River	Research Coast	Southeast	Treasure Coast Regional Planning Council	Indian River County Chamber of Commerce		
Martin	Research Coast	Southeast	Treasure Coast Regional Planning Council	Business Development Board of Martin County		

Palm Beach County	Palm Beach County	Southeast	Treasure Coast Regional Planning Council	Palm Beach County Department of Housing and Economic Development	Business Development Board of Palm Beach County	Economic Council of Palm Beach County, Inc.
St. Lucie	Research Coast	Southeast	Treasure Coast Regional Planning Council	St. Lucie County Economic Development Council		

All four counties in the proposed regional planning area across the two local workforce development boards are located within the same SelectFlorida region (Southeast). The [Treasure Coast Regional Planning Council](#) covers Indian River, Martin, Palm Beach, and St. Lucie Counties exclusively as a regional planning and economic development body. Palm Beach County has two appointed individuals on this Council to include the CEO of LWDB 21 CareerSource Palm Beach County and its Labor Market Performance Manager. In addition to the regional economic development lens showcasing a common economic development area, each county also has the local economic development capacity to focus on local projects and priorities.

**Federal and non-federal education and training providers to administer programs under WIOA subtitle B:** The below table encapsulates the local workforce development areas’ most recently publicly posted local eligible training provider list. The CareerSource Florida State Board of Directors recently approved FloridaCommerce Administrative Policy “[Eligible Training Providers List Requirements](#)” (page 116 of the September 19 2023 Board Meeting). This admin policy directs that moving forward, the local ETPLs will be a subset of the state level ETPL – with a recognition that LWDBs have the discretion to add additional requirements for training providers except for registered apprenticeship programs moving forward. This list showcases ample coverage of training providers within the proposed region.

*{The rest of this page intentionally left blank. ETPL table for CareerSource Research Coast and CareerSource Palm Beach County can be found on the following page}*

<b>LWDB</b>	<b>Provider</b>
Research Coast	Fortis
Research Coast	Indian River State College
Research Coast	Keiser University
Research Coast	PC Professor
Research Coast	Treasure Coast Technical College
Research Coast	Treasure Coast Medical Institute
Research Coast	CareerSource Research Coast
Research Coast	CVS Health
Research Coast	Florida Behavioral Health Association
Research Coast	Florida East Coast Electrical JATC
Research Coast	Florida Training Services
Research Coast	Learning Alliance Corporation Apprenticeship, GNJ
Research Coast	Machining Solutions
Research Coast	OpenClassrooms
Research Coast	Palm Beach County Ironworkers JATC
Research Coast	Pipe U Registered Apprenticeship
Research Coast	Piper Aircraft
Research Coast	Society for Human Resource Management Foundation
Palm Beach County	Academy for Nursing and Health
Palm Beach County	Barry University
Palm Beach County	Brainstation Education
Palm Beach County	Cambridge College of Healthcare and Technology
Palm Beach County	Capscore Academy for Healthcare Education
Palm Beach County	Care Hope College
Palm Beach County	Chancellor Institute
Palm Beach County	College of Health and Allied Development
Palm Beach County	Connecticut School of Broadcasting
Palm Beach County	DATS of Florida
Palm Beach County	Dentrilogy Academy
Palm Beach County	Emergency Educational Institute
Palm Beach County	Florida Atlantic University
Palm Beach County	HCI College
Palm Beach County	International College of Health Sciences
Palm Beach County	ITech Technical
Palm Beach County	Jose Maria Vargas University
Palm Beach County	Keiser University
Palm Beach County	LiveIT Academy
Palm Beach County	Medical Career Academy
Palm Beach County	Medical Institute of Palm Beach
Palm Beach County	Palm Beach Code School
Palm Beach County	Palm Beach County School Board
Palm Beach County	Palm Beach State College
Palm Beach County	PC Professor

Palm Beach County	QM Career Institute
Palm Beach County	Ruby's Academy for Health Occupations
Palm Beach County	South Florida Academy of Air Conditioning
Palm Beach County	South Florida Healthcare Institute
Palm Beach County	Southeastern College
Palm Beach County	Suncoast Trucking Academy
Palm Beach County	The Academy - Ft Lauderdale
Palm Beach County	The CDL School

**Population centers and changes:** The following table showcase total population in 2017, total population in 2022, the change in that total population from that period, and the percentage growth. The next table after that showcases the same data but restricted only to the working age population of 25–65-year-old residents. This data is sourced from the US Census Bureau American Community Survey and is presented on a county level. Following the tables is a brief narrative showcasing trends throughout the proposed regional planning area.

County	LWDB	2017 Total Population	2022 Total Population	2017-2022 Change	2017-2022 Growth
Indian River	Research Coast	147,981	160,986	13,005	8.8%
Martin	Research Coast	155,719	159,399	3,680	2.4%
Palm Beach County	Palm Beach County	1,426,772	1,494,805	68,033	4.8%
St. Lucie	Research Coast	298,763	334,682	35,919	12.0%

County	LWDB	2017 Working Age Population (25-65)	2022 Working Age (25-65) Population	2017-2022 Working Age Change	2017-2022 Working Age Growth
Indian River	Research Coast	66,989	71,349	4,360	6.5%
Martin	Research Coast	73,246	73,180	-66	-0.1%
Palm Beach County	Palm Beach County	708,643	734,394	25,751	3.6%
St. Lucie	Research Coast	146,320	163,215	16,895	11.5%

All four counties in the proposed regional planning area experienced population growth. St. Lucie County grew the most in relation to relative population, with a 12% increase in population from 2017 to 2022. Palm Beach County added the greatest number of total residents with a population increase of nearly 70,000 people during the period. Palm Beach County would be the population center of this region, with nearly 1.5 million residents living in the county in 2022. Nearly ¾ of a million of those residents are between the ages of 25-65. There are more than 2.1 million residents living within the four counties of this proposed regional planning area.

**Commuting patterns:** Commuting patterns are directly from the US Census Bureau OnTheMap 2021 estimates on a LWDB level. The commuting patterns are split by “Work” and “Home” destinations. The “Home” destination reports showcase where workers live who are employed within the LWDB. The “Work” destination reports showcase where workers are employed who live within the borders of the LWDB. These reports are designed to showcase relationships amongst the LWDBs in the proposed RPA.

Major findings from the commuting pattern analysis include:

- About 7% of the workers who are employed within the CareerSource Research Coast service area call Palm Beach County their home.
- About 14.8% of workers who live in CareerSource Research Coast’s service area are working in Palm Beach County. For context, that means more people who live in CareerSource Research Coast hold a job in Palm Beach County than Indian River County (14.6%). This indicates a strong relationship between the two local workforce development boards in terms of serving similar populations and workers that regularly cross the LWDB boundary for work and life.
- About 3% of workers who are employed in Palm Beach County service area live in St. Lucie County and 2.5% in Martin County.

*{The rest of this page intentionally left blank. Commuting pattern reports are presented on the next four pages for each of the LWDBs in the proposed RPA}*



*CareerSource Research Coast*

The commuting patterns are split by “Work” and “Home” destinations. The “Home” destination reports showcase where workers live who are employed within the LWDB. The “Work” destination reports showcase where workers are employed who live within the borders of the LWDB.

**Home Destination - Full LWDB**

**Total All Jobs**

	<b>2021</b>	
	<b>Count</b>	<b>Share</b>
Total All Jobs	206,242	100.0%

<b>Jobs Counts by Counties Where Workers Live - All Jobs</b>		
	<b>2021</b>	
	<b>Count</b>	<b>Share</b>
St. Lucie County, FL	75,711	36.7%
Indian River County, FL	36,818	17.9%
Martin County, FL	30,979	15.0%
Palm Beach County, FL	14,321	6.9%

**Work Destination - Full LWDB**

**Total All Jobs**

	<b>2021</b>	
	<b>Count</b>	<b>Share</b>
Total All Jobs	251,748	100.0%

<b>Jobs Counts by Counties Where Workers are Employed - All Jobs</b>		
	<b>2021</b>	
	<b>Count</b>	<b>Share</b>
St. Lucie County, FL	58,601	23.3%
Martin County, FL	48,220	19.2%
Palm Beach County, FL	37,166	14.8%
Indian River County, FL	36,687	14.6%

*CareerSource Palm Beach County*

The commuting patterns are split by “Work” and “Home” destinations. The “Home” destination reports showcase where workers live who are employed within the LWDB. The “Work” destination reports showcase where workers are employed who live within the borders of the LWDB.

**Home Destination - Full LWDB**

**Total All Jobs**

	<b>2021</b>	
	<b>Count</b>	<b>Share</b>
Total All Jobs	612,502	100.0%

<b>Jobs Counts by Counties Where Workers Live - All Jobs</b>		
	<b>2021</b>	
	<b>Count</b>	<b>Share</b>
Palm Beach County, FL	394,018	64.3%
Broward County, FL	76,890	12.6%
Miami-Dade County, FL	31,315	5.1%
St. Lucie County, FL	18,141	3.0%
Martin County, FL	15,267	2.5%
Orange County, FL	7,703	1.3%
Hillsborough County, FL	7,422	1.2%
Lee County, FL	6,356	1.0%

**Work Destination - Full LWDB**

**Total All Jobs**

	<b>2021</b>	
	<b>Count</b>	<b>Share</b>
Total All Jobs	586,130	100.0%

<b>Jobs Counts by Counties Where Workers are Employed - All Jobs</b>		
	<b>2021</b>	
	<b>Count</b>	<b>Share</b>
Palm Beach County, FL	394,018	67.2%
Broward County, FL	82,014	14.0%
Miami-Dade County, FL	34,406	5.9%
Orange County, FL	9,402	1.6%
Martin County, FL	8,080	1.4%
Hillsborough County, FL	7,635	1.3%
Lee County, FL	4,705	0.8%
St. Lucie County, FL	4,695	0.8%

**Industrial composition and location quotients:** Included is a county level breakdown of location quotients (LQs) for each of the counties included in the initially requested RPAs. LQs measures the counties industrial specialization relative to the entire US based off population and the number of jobs. An LQ of 1 indicates an average concentration of that industry while an LQ greater than 1 indicates a specialization and less than 1 a lack of industry concentration. The data included are at a 2-digit NAICS level for 2022. Following the table is a brief narrative highlighting similar industry strengths amongst counties represented in the proposed RPA. These values are sourced from Lighthcast.

County	LWDB	Agriculture, Forestry, Fishing and Hunting	Mining, Quarrying, and Oil and Gas Extraction	Utilities	Construction	Manufacturing	Wholesale Trade	Retail Trade	Transportation and Warehousing	Information	Finance and Insurance	Real Estate and Rental and Leasing	Professional, Scientific, and Technical Services	Management of Companies and Enterprises	Administrative and Support and Waste Management and Remediation Services	Educational Services	Health Care and Social Assistance	Arts, Entertainment, and Recreation	Accommodation and Food Services	Other Services (except Public Administration)	Government	Unclassified Industry
Indian River	Research Coast	1.61	0.08	0.82	1.48	0.50	0.57	1.50	0.42	0.33	0.72	1.55	0.77	0.35	1.05	0.64	1.28	2.65	1.14	1.73	0.57	0.66
Martin	Research Coast	0.80	0.17	1.16	1.54	0.55	0.80	1.25	0.49	0.47	0.68	1.17	0.79	0.22	1.43	0.38	1.44	1.87	1.21	1.65	0.51	0.67
Palm Beach County	Palm Beach County	1.04	0.08	0.87	1.18	0.38	0.85	1.15	0.60	0.75	1.01	1.83	1.18	0.94	1.37	0.81	1.03	1.92	1.17	1.64	0.61	0.87
St. Lucie	Research Coast	0.71	0.02	1.73	1.48	0.63	0.82	1.41	1.05	0.32	0.41	1.15	0.71	0.15	1.15	0.71	1.06	1.12	1.20	1.20	1.01	0.80

*{The rest of this page intentionally left blank. Narrative on industry composition is on the following page}*

Location quotients are a measure of the concentration of industry employment in a given geography relative to total population. For the sake of the analysis, the LQs are broken down on a county level and at the highest NAICS level (2 digits). The primary portion of this analysis will highlight industry strengths for each county. The secondary portion will highlight shared industry strengths to capitalize moving forward.

- **Indian River County** (CareerSource Research Coast) has an LQ greater than 1 for Agriculture/Forestry/Fishing (1.61), Construction (1.48), Retail Trade (1.50), Real Estate (1.55), Administrative Support (1.05), Healthcare (1.28), Recreation/Entertainment (2.65), and Accommodation/Food (1.14)
- **Martin County** (CareerSource Research Coast) has an LQ greater than 1 for Utilities (1.16), Construction (1.54), Retail Trade (1.25), Real Estate (1.17), Administrative Support (1.43), Healthcare (1.44), Recreation/Entertainment (1.87), and Accommodation/Food (1.21)
- **Palm Beach County** (CareerSource Palm Beach County) has an LQ greater than 1 for Agriculture/Forestry/Fishing (1.04), Construction (1.18), Retail Trade (1.15), Finance and Insurance (1.01), Real Estate (1.83), Professional Services (1.18), Administrative Support (1.37), Healthcare (1.03), Recreation/Entertainment (1.92), and Accommodation/Food (1.17)
- **St. Lucie County** (CareerSource Research Coast) has an LQ greater than 1 for Utilities (1.73), Construction (1.48), Retail Trade (1.41), Transportation and Warehousing (1.05), Real Estate (1.15), Administrative Support (1.15), Healthcare (1.06), Recreation/Entertainment (1.12), Accommodation/Food Services (1.20), and Government (1.01).

The secondary portion of this analysis will highlight common industry strengths within the proposed regional planning area.

- **Construction, Real Estate, and Utilities:** All four counties have an LQ in construction greater than 1.1, indicating strong employment within that sector for the region. In addition, each county exhibits a strong level of employment within Real Estate. Martin and St. Lucie counties also have an elevated number of jobs in the Utilities industry. These related industries support continued development and expansion in growing regions – and all four counties are experiencing population growth.
- **Administrative Support/Back Office:** All four counties in the proposed regional planning area have an elevated level of employment in administrative support and back-office industries, indicating a strength to place potential jobseekers in entry level positions.
- **Healthcare:** As populations continue to age throughout the country, but also in the propose regional planning area, healthcare services will continue to grow in demand. All four counties have elevated levels of employment within the healthcare industry.
- **Recreation/Entertainment and Accommodation/Food Services:** . As the region, continues to grow as a tourist destination with access to beaches, these industries that support tourism have the potential to grow.

- Agriculture/Forestry/Fishing:** Palm Beach County and Indian River County both have LQs that are greater than 1 for Agriculture/Forestry/Fishing. The western portion of Palm Beach County is rural and heavily reliant upon this industry. As the proposed regional planning region starts to plan for collaborative strategies, this may be an industry of interest shared across the two local workforce development areas.

**Labor force conditions:** The next three tables display 2017-2022 labor force size and unemployment rate (US BLS) on a county level, 2017-2022 earnings for full time workers and 2022 earnings disaggregated by select education levels, the labor force participation rate for ages 20-64, unemployment rate disaggregated by race, the total population below the poverty line, and educational attainment rates. Following the tables will be a brief narrative highlighting similarities amongst the counties included in the proposed RPA that could inform future planning.

County	LWDB	2017				2022			
		Labor Force	Employed	Unemployed	Unemployment Rate	Labor Force	Employed	Unemployed	Unemployment Rate
Indian River	Research Coast	63,455	60,211	3,244	5.1	67,947	65,644	2,303	3.4
Martin	Research Coast	71,501	68,459	3,042	4.3	76,101	74,049	2,052	2.7
Palm Beach County	Palm Beach County	716,528	686,091	30,437	4.2	763,006	740,847	22,159	2.9
St. Lucie	Research Coast	138,130	130,882	7,248	5.2	155,564	150,258	5,306	3.4

County	LWDB	Earnings					
		2017 Earnings (Median earnings (dollars) for full-time, year-round workers with earnings)	2022 Earnings (Median earnings (dollars) for full-time, year-round workers with earnings)	2017-2022 Change in Earnings (Median for full time)	2017-2022 Growth (Median for full time)	2022 Median Earnings Less than High School	2022 Earnings Some College/Associates
Indian River	Research Coast	\$ 36,546	\$ 48,750	\$ 12,204	33.4%	\$ 29,969	\$ 37,500
Martin	Research Coast	\$ 43,930	\$ 56,566	\$ 12,636	28.8%	\$ 28,148	\$ 39,131
Palm Beach County	Palm Beach County	\$ 42,079	\$ 53,946	\$ 11,867	28.2%	\$ 27,808	\$ 41,691
St. Lucie	Research Coast	\$ 36,361	\$ 46,078	\$ 9,717	26.7%	\$ 31,383	\$ 39,893

County	LWDB	Labor force conditions				Poverty	Education		
		LFPR 20-64 (2022)	Unemployment Rate - White Alone - 2022	Unemployment Rate - Black Alone 2022	Unemployment Rate - Hispanic Alone 2022	Total below poverty line	Pop 25-64 w/out high school	Pop 25-64 with only high school	Pop 25-64 with some college and above
Indian River	Research Coast	72.9%	5.6%	12.3%	3.7%	9,878	7,355	18,329	25,684
Martin	Research Coast	73.3%	4.0%	8.9%	5.0%	7,995	6,209	17,583	23,792
Palm Beach County	Palm Beach County	79.9%	5.0%	8.3%	5.4%	80,917	84,636	167,127	251,763
St. Lucie	Research Coast	76.1%	5.3%	8.2%	5.9%	19,817	17,591	50,570	33,268

This portion of the analysis will consider unemployment rates, labor force participation rates, median earnings, poverty, and educational attainment for the counties within the proposed regional planning area.

*Unemployment conditions:* Compared to 2017, the unemployment rate for all of the counties within the proposed regional planning area has diminished. For example, in 2017 St. Lucie County had an unemployment rate of 5.2% with more than 7,200 unemployed workers looking for jobs. In 2022, that rate has dropped to 3.4% with 5,300 workers looking for jobs – despite adding more than 12,000 total people to the workforce in that same period. The counties within the proposed regional planning area all exhibit labor force growth and the ability to grow the jobs base to support that growth in a tight labor market.

*Labor force participation rates:* The counties within this proposed regional planning area all have strong labor force participation rates, with Palm Beach County nearing a very high 80% labor force participation rate. For comparison’s sake, the US average labor force participation rate as of November 2023 was just over 62%. The high labor force participation rate, coupled with the low unemployment rate, signifies a wealth of opportunities for job seekers within the proposed regional planning area. However, with this opportunity comes a challenge for employers within the regional planning area. There is an opportunity for the two local workforce development boards to co-develop creative strategies to continue to assist employers in need of talent within the two areas.

*Median earnings:* All four counties experienced an increase in their median earnings for full time workers from 2017 to 2022. Besides St. Lucie County, each of the counties experienced a more than \$10,000 increase in median earnings for full time workers (St. Lucie County just missed the \$10,000 mark with a \$9,717 increase). All four counties exhibited strong growth rates ranging from 26.7% to 33.4% growth.

*Poverty and educational attainment:* Each of the counties represented in the regional planning area have populations in poverty. While this data set doesn’t capture the qualitative nature of that