



# Programs and Services Committee

## MEETING AGENDA

### *Meeting Details*

**Date:** Wednesday, May 29, 2024

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

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

### *MS Teams Virtual Meeting Access:*

**Access Code:** : 474 675 370#

**Phone:** 772-800-5467

**URL:** [Join the meeting now](#)

### *Opening Remarks*

1. Welcome & Attendance

### *Voting Items*

None

### *Information/Discussion*

2. Primary Indicators of Performance 3<sup>rd</sup> Quarter - PY 2023-2024 (Tentative)
3. Taylor, Hall, Miller, and Parker (THMP) Monitoring - March 28, 2024
4. WIOA Local Four-Year Plan
5. CareerSource Research Coast (CSRC) Program Updates
  - a. Wagner-Peyser (WP)/TAA
    - Reemployment Services and Eligibility Assessment (RESEA) Program
    - Staffing Updates
  - b. Workforce Innovation and Opportunity Act (WIOA)
    - On-the-Job (OJT) Training Progress YTD (Christina Coble)
    - Individual Training Account (ITA) Expenditures (Kate Sayger)
    - Staff Training Updates - Career Planner I/Recruiter WIOA-OJT (Kate Sayger)
  - c. Welfare Transition (WT)/SNAP
    - Staffing/Combination of Positions
    - Procedure Updates
  - d. Jobs for Veterans State Grant (JVSG)/Migrant and Seasonal Farmworkers (MSFW)
    - JVSG - Staffing, Stand Down, VPL 5-24
    - MSFW - Four-Year Plan, Outreach Efforts
6. Regional Planning Update
7. Hope Florida Program Update
8. Welfare Transition/Temporary Assistance for Needy Families (TANF) Summer Program Update
9. Adjournment - Next P & S Meeting - August 28, 2024

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## AGENDA ITEM SUMMARY

Title	LWDB 20 Primary Indicators of Performance for Program Year (PY) 2023-2024 3rd 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	For Information Only
Background	<p>The State of Florida must negotiate and agree upon performance levels for WIOA, and WP programs funded by the United States Department of Labor, Employment, and Training Administration. Once the state levels are established, the Department of Economic Opportunity (DEO) must negotiate and reach agreements with the Local Workforce Development Boards for their local performance targets.</p> <p>Staff will review CareerSource Research Coast's performance for the 3rd quarter of PY2023-2024.</p>
Staff Recommendations	None - Information Only
Supporting Material	LWDB 20 PY2023-2024 3rd Quarter Performance
Board Staff	Shelly Batton Director of Programs <a href="mailto:sbatton@careersourcerc.com">sbatton@careersourcerc.com</a> (866) 482-4473 ext. 518

# Agenda Item 3

## AGENDA ITEM SUMMARY

<b>Title</b>	Taylor, Hall, Miller and Parker (THMP) Monitoring Report
<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>CSRC is responsible for monitoring all administration and program operations to ensure maximum effectiveness and efficiency of all management, programmatic, and fiscal systems. Monitoring should ensure that abuses in program operations are identified promptly, resulting in the prevention and/or elimination of any misuse of funds.</p> <p>Per State requirements, CSRC conducts internal monitoring on a scheduled basis. Various staff members with programmatic experience are utilized to ensure that programs comply with federal/state/local regulations and policies. Internal monitoring is also completed to track performance, reach goals, and provide for continuous improvement. Through a competitive procurement process, CSRC also contracts with an independent monitoring firm to review any potential programmatic or fiscal issues.</p> <p>Staff will provide the Program and Services Committee with the results of the monitoring completed by CSRC's independent monitoring firm, THMP.</p>
<b>Staff Recommendations</b>	None - Information Only
<b>Supporting Material</b>	None - Information Only
<b>Board Staff</b>	<p>Shelly Batton            Director of Programs  <a href="mailto:sbatton@careersource.com">sbatton@careersource.com</a>            (866) 482-4473 ext. 518</p>

CAREERSOURCE RESEARCH COAST  
PROGRAM YEAR 2023-2024  
FINANCIAL & PROGRAMMATIC MONITORING  
AS OF MARCH 28, 2024

REPORT #2



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



Independent Accountants' Report  
On Applying Agreed-Upon Procedures

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

We have performed the procedures enumerated below in the attached sections on the fiscal and programmatic records of CareerSource Research Coast (CareerSource) as of March 28, 2024, for the program year ending June 30, 2024. CareerSource's management is responsible for the fiscal and programmatic records.

An agreed-upon procedures engagement involves the practitioner performing specific procedures that the engaging party has agreed to and acknowledged to be appropriate for the intended purpose of the engagement and reporting on findings based on the procedures performed. CareerSource has agreed to and acknowledged that the procedures performed are appropriate to meet the intended purpose of conducting fiscal and programmatic monitoring. This report may not be suitable for any other purpose. The procedures performed may not address all the items of interest to a user of this report and may not meet the needs of all users of this report and, as such, users are responsible for determining whether the procedures performed are appropriate for their purposes.

For reporting purposes, findings and observations are as follows:

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

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

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

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

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

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

*Taylor Hall Miller Parker, P.A.*

April 3, 2024

I. CareerSource

*ETA Salary CAP*

1. We obtained the Annual ETA Salary and Bonus Cap Analysis – Certification Form 2023 and Calendar Year 2023 ETA Salary Cap Calculation worksheet for CareerSource to determine whether:
  - a. compensation for the highest-paid employee(s) was identified,
  - b. appropriate supporting documentation was maintained, and
  - c. appropriate entries were made to reduce the level of ETA funding for any employees whose compensation was higher than the ETA Salary cap.

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

*Financial Review*

1. We randomly selected the accounts payable account bank statement and reconciliation for the month ended February 29, 2024, and performed the following:
  - a. Confirmed whether the bank account was reconciled and reviewed in a timely manner.
  - b. Traced the reconciled bank balance to the general ledger.
  - c. Mathematically checked the clerical accuracy of the reconciliation.
  - d. Compared the bank balance listed on the reconciliation to the bank statement.
  - e. Traced deposits listed on the bank statement to the bank transfer from the Business Checking Account.
  - f. For a random sample of cleared checks per the bank statement:
    - 1) agreed the payee, check date, and amount per the cancelled check image to the check register;
    - 2) determined whether the endorsement agreed to payee or the bank guaranteed lack of endorsement; and
    - 3) agreed the payee and amount to the supporting documentation (invoice).
  - g. For the list of outstanding checks, traced the check number and amount to the check register.

- h. Accounted for the sequence of checks listed in the check register for February by tracing the check number to the bank statement or the list of outstanding checks, or by examining the voided check.
- i. Inquired about any large or unusual outstanding checks that were outstanding for a period of time.
- j. Completed the section of the FloridaCommerce monitoring tool related to cash management.

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

- 2. We selected a random sample of four small purchases (\$250,000 or less) and two expense reimbursements from the period ended March 14, 2024, reviewed current policies and procedures, and determined whether:

- a. check data agreed to invoice(s);
- b. the check contained an authorized signature and endorsement agreed to payee, or bank guaranteed lack of endorsement, if applicable;
- c. the disbursement was supported by proper documentation and approval;
- d. purchasing and travel procedures were followed and a cost or price analysis was performed, if applicable;
- e. the cost was allowable, reasonable, and necessary;
- f. the cost was properly charged (i.e., benefiting program or cost pool) and classified;
- g. payment traced to general ledger posting;
- h. prior approval procedures were followed in accordance with FloridaCommerce guidance, when applicable;
- i. the cost was properly capitalized or tracked for inventory purposes in accordance with local policy, as applicable; and
- j. contracts in excess of \$35,000 were posted on CareerSource's website in accordance with the FloridaCommerce grantee/subgrantee agreement.

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

- 3. We obtained and inspected CareerSource's Negotiated Indirect Cost Agreement (NICA) and Indirect Cost Plan (ICP), randomly selected the February 2024 indirect cost recovery, and determined the following for a sample of funds:



- a. Modified total direct costs (MTDC) traced to the general ledger and supporting schedules and were correctly calculated by fund.
- b. The indirect cost recovery method agreed with the approved NICA.
- c. Indirect cost recovery was correctly calculated by fund and between admin and program.
- d. Indirect costs were properly posted in the general ledger by fund.

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

### *Payroll Review*

1. We randomly selected the payroll register for the pay period ended March 8, 2024 (pay date 3/15/2024), selected a random sample of eight employees, and determined whether:
  - a. ACH/direct deposit data agreed to payroll register,
  - b. gross pay recalculated and deductions appeared reasonable,
  - c. leave was properly approved and tracked and agreed to the Personnel Activity Report (PAR),
  - d. the timesheet (PAR) was properly signed and approved,
  - e. the pay rate for the employee was authorized and in compliance with the requirements of the FloridaCommerce grantee/subgrantee agreement,
  - f. payroll allocation percentages recalculated and traced to the supporting PAR,
  - g. costs were properly allocated and classified,
  - h. costs traced to general ledger postings, and
  - i. payroll taxes per the payroll register reconciled to the payroll tax deposit.
2. We obtained the John Hancock USA retirement contribution payment and, for the sample of employees, traced employee deferrals and employer contributions to the payroll register.
3. We determined whether current employee positions, salary information for each position (including performance bonuses), and Exhibit E were posted on CareerSource's website in accordance with the FloridaCommerce grantee/subgrantee agreement and F.S. 445.007(13).

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

### *Customer-Related Expenditures*

1. We selected a random sample of 12 occupational skills training, contracted apprenticeship training, and training-related payments from the period ended March 14, 2024, obtained the supporting documentation for each disbursement, and determined whether:
  - a. check data agreed to supporting documentation;
  - b. the check contained authorized signatures and endorsement agreed to payee, or bank guaranteed lack of endorsement, if applicable;
  - c. the disbursement was supported by proper documentation and approval;
  - d. the cost was allowable, reasonable, and necessary;
  - e. the cost was properly allocated and classified;
  - f. the payment traced to the general ledger and Gazelle (if applicable);
  - g. the customer was registered in the appropriate State system, and the system reflected the appropriate activity/service;
  - h. the training vendor appeared on the approved training vendor list (if applicable), and the cost was incurred for a demand occupation; and
  - i. the total training budget does not exceed program caps, and the budget is correctly reflected in Gazelle (if applicable).

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

2. We selected a random sample of five WIOA On-the-Job Training (OJT) payments from the period ended March 14, 2024, and performed the following for the employer invoices included with the payment:
  - a. Confirmed the mathematical accuracy.
  - b. Determined whether the amount invoiced/reimbursed agreed with the OJT agreement/training plan.
  - c. Determined whether appropriate documentation as required by the contract/agreement was submitted to support payment.
  - d. For a sample of customers identified on the invoice, we determined whether:
    1. the customer was properly registered in Employ Florida (EF);

2. an OJT activity was recorded; and
  3. the employment wage rate at case closure agreed with the information provided by the employer, if applicable.
- e. Traced the payment to the general ledger.
  - f. Determined whether the check contained authorized signatures and endorsement agreed to payee, or bank guaranteed lack of endorsement, if applicable.

*City of Fort Pierce (ck# 82934, \$4,058.90)*

*ASharp Productions dba Phoenix Music (ck# 83089, \$1,243.00)*

*Phoenix Metal Products (ck# 83126, \$1,921.50)*

*Xecutive Drive LLC (ck# 83180, \$720.00)*

*TMX Aero LLC (ck# 83210, \$637.20)*

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

#### Observations:

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

1. For L.L. (EF ID# 14716023) and M.A. (EF ID# 16365008), the wage rate recorded in EF at case closure did not agree with supporting documentation in the customer file; the wage rate indicated on the OJT Training Plan was utilized rather than the customer's actual pay per pay records provided by the employer.

#### Recommendation:

During fieldwork, employment information was corrected in EF for these customers; no further corrective action is necessary.

#### *Support Service Cards*

1. Through inquiry of CareerSource staff, we obtained an understanding of the current support service cards purchasing, issuance, tracking, and reconciliation processes utilized.
2. We selected a random sample of six WTP customers receiving support service cards during this program year (January and February 2024) to determine whether the service and amounts were properly documented in OSST and Gazelle, supported by appropriate documentation, and agreed to the issuance per the Master Tracking Log Spreadsheet.

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

## II. Subrecipient Financial

### *Subrecipient Audit Review*

1. We inspected the following audit reports submitted by CareerSource's subrecipients:

- Eckerd Youth Alternatives, Inc. – 6/30/2023

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

### *Subrecipient ETA Salary CAP*

1. We obtained the Annual ETA Salary and Bonus Cap Analysis – Certification Form 2023 and Calendar Year 2023 ETA Salary Cap Calculation worksheet for CareerSource's subrecipient Eckerd Youth Alternatives to determine whether:

- a. compensation for the highest-paid employee(s) was identified,
- b. appropriate supporting documentation was maintained, and
- c. appropriate entries were made to reduce the level of ETA funding for any employees whose compensation was higher than the ETA Salary cap.

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

#### Observations:

1. As a result of applying the procedures to the sample selected, we observed the following that should be addressed:
  - As indicated in the FloridaCommerce guidance, the salary cap calculation should include subrecipient staff who worked on funding activities subject to the cap during the calendar year, and this form is required to be filled out in its entirety for the highest-paid staff members regardless of total compensation earned. If the highest-paid staff member exceeds the cap, these procedures should be performed with the next-highest-paid staff member or position until the final entry does not exceed the cap. However, the form completed by the subrecipient did not include all staff until the next-highest-paid staff member or position did not exceed the cap. Additionally, support for the salary and bonus figures on the form and for posted journal entries for the Amount of Unallowable Salary and Bonus Over the Cap required by April 1, 2024, per guidance from FloridaCommerce, were not provided.

Recommendation:

CareerSource should ensure that a properly completed Calendar Year 2023 ETA Salary Cap Calculation worksheet, along with requisite supporting documentation, is obtained from the subrecipient.

*Subrecipient Payment Request*

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

7. the payroll service fee recalculated in accordance with the agreement, and
  8. costs were properly classified as WIOA In-School or Out-of-School.
- h. For a random sample of participant incentive billings, traced the amount billed to the supporting documentation and determined whether:
1. costs were supported by proper documentation and approval,
  2. the participant was registered in EF as a WIOA Youth with a corresponding incentive activity open, and
  3. the cost was properly classified as In-School Youth (ISY) or Out-of-School Youth (OSY).
- i. Determined whether the subrecipient adhered to the line-item contract budget.
- j. Determined whether costs were properly reported between ISY and OSY.
- k. Traced the payment to the CareerSource's general ledger posting.
- l. Determined whether the contract was posted on CareerSource's website in accordance with the FloridaCommerce grantee/subgrantee agreement.

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

Observations:

1. As a result of applying the procedures to the payment request selected, we observed the following that should be addressed to improve financial documentation:

*Operations*

- Licensing Fees (\$1,350) with a description of Adobe Pro Licenses FY24/PY23 were billed; however, documentation provided did not adequately support the cost. Per correspondence with CareerSource finance, the subrecipient is issuing a credit on the next invoice for the amount billed, and reimbursement will not be requested by the subrecipient until proper documentation is obtained for this cost.

*Participant Costs - Work Experience*

- An Excel worksheet containing payroll information and costs was provided; however, the payroll register was not submitted.

Recommendation:

The subrecipient should ensure that payroll registers are submitted with work experience payroll billings and that all costs billed are adequately substantiated.

III. WIOA Adult/DW

*File/System Review*

1. We selected a random sample of 10 WIOA Adult and Dislocated Worker customers from enrollments in Employ Florida (EF) during PY23-24 and inspected customer files and EF for evidence of eligibility and program documentation, using information on FloridaCommerce's 2023-2024 WIOA Adult/DW Programmatic Review Tool.

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

2. We selected a random sample of four WIOA Adult and Dislocated Worker customers who exited the program within the last 12 months and inspected customer files and EF for evidence of proper case closure and follow-up, using information on FloridaCommerce's 2023-2024 WIOA Adult/DW Programmatic Review Tool.

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

Observations:

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

1. For E.B. (EF ID# 16325785), the wage rate recorded in EF at case closure did not agree with supporting documentation in the customer file; the wage rate indicated on the OJT Training Plan was utilized rather than the customer's actual pay per pay records provided by the employer.

Recommendation:

During fieldwork, employment information was corrected in EF for this customer; no further corrective action is necessary.

IV. WIOA Youth

*File/System Review*

1. We selected a random sample of 10 WIOA Youth customers from enrollments in Employ Florida (EF) during PY23-24 and inspected customer files and EF for evidence of eligibility and program documentation, using information on FloridaCommerce's 2023-2024 WIOA Youth Programmatic Review Tool.

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

2. We selected a random sample of three WIOA Youth customers who exited the program within the last 12 months and inspected customer files and EF for evidence of proper case closure and follow-up, using information on FloridaCommerce's 2023-2024 WIOA Youth Programmatic Review Tool.

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



V. Wagner-Peyser

*Services Review*

1. We selected a random sample of 24 Wagner-Peyser customers from Employ Florida (EF) and inspected documentation in EF for the period December 1, 2023, through March 25, 2024, to determine whether proper procedures were followed and the services provided were properly documented, using FloridaCommerce’s 2023-2024 Wagner-Peyser Programmatic Review Tool.

Findings:

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

1. For the following newly created, staff-assisted customer registrations, there was no case note documenting the customer’s permission to create the account in EF as required by CareerSource Florida (CSF) Policy #096:

Customer	EF ID#	Center
O.A.	16472472	Martin
S.J.	16509808	Indian River

Recommendation:

For staff-assisted registrations, staff should ensure the customer’s permission to create the EF account is documented in a case note.

2. For the following customer who received a staff-assisted job referral, a complete registration was not documented in EF; no O\*Net code was recorded in EF:

Customer	EF ID#	Center
C.C.	14271966	St Lucie County

Recommendation:

Staff should ensure that an O\*Net code is recorded in EF when a complete registration is required.

3. For the following Veteran customer, there was no priority of service code 189 recorded in EF:

Customer	EF ID#	Center
R.M.	16486990	Martin

Recommendation:

Staff should ensure that Veteran customers receive a priority of service code and document the entitlements and services made available to the Veteran customer in a case note when recording code 189 in EF.

4. For the following Veteran customer who received a Veteran Intake Screening code 159, the required criteria to be documented in a case note was not in EF:

Customer	EF ID#	Center
Z.O.	16468512	St Lucie County

Recommendation:

Staff should ensure that when Veteran Intake Screening is conducted, the following information is documented in EF:

- Results of screening
- Specific eligibility criteria
- SBE department referred to
- Why/why not referred to DVOP
- Outcome

Observations:

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

1. For the following federal contractor employer that received LVER services code E10, Office of Federal Contractor Compliance Program (OFCCP) outreach was not documented in EF:

Employer	EF Site ID#
Martin County School	22895

Recommendation:

When a LVER provides services to a federal contractor, OFCCP outreach should be provided to the employer and documented EF.

*Job Order Review*

1. We selected a random sample of 10 Wagner-Peyser job orders with open dates of January 1, 2024, or subsequent and inspected the job orders documented in EF, using information on FloridaCommerce's 2023-2024 Wagner-Peyser Programmatic Review Tool to determine whether proper procedures were followed.

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

VI. Reemployment Services and Eligibility Assessment (RESEA)

*File/System Review*

1. For a random sample of five RESEA customers for the period December 1, 2023, through March 25, 2024, we inspected the services documented in Employ Florida, using information on FloridaCommerce's 2023-2024 Wagner-Peyser Programmatic Review Tool for RESEA to determine whether proper procedures were followed.

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

VII. Welfare Transition Program (WTP)

*File/System Review*

1. We selected a random sample of 15 cases that were active in the Welfare Transition Program (WTP) during the period January 1, 2024, through March 28, 2024, and utilized information on the 2023-2024 WTP Monitoring Tool developed by FloridaCommerce to inspect the State system (OSST) and case files for evidence of compliance.

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

Observations:

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

*Orientation/Assessment*

- The highest grade completed for participants was missing from the OSST Education Details:

Participant	OSST ID#
K.J.	5003523
R.P.	5001933

*Employment*

- An Employment follow-up (30-day) for participant D.D. (OSST ID# 5014091) was missing from the Follow-up Record in OSST.

*Deferred Cases*

- An incorrect Deferral Type (Deferred for 30 Days or Less) was selected in OSST for participant A.L. (OSST ID# 4983074); the Deferral is for Greater than 30 Days.

*Pre-penalties and Sanctions*

- The pre-penalty for participant C.O. (OSST ID# 4869225) was not terminated in a timely manner.
- An incorrect pre-penalty termination date was entered into OSST for participant H.M. (OSST ID# 4991671). Upon determining good cause, the pre-penalty should have been terminated with the date of the supposed failure.
- An incorrect sanction termination date was entered into OSST for participant J.W. (OSST ID# 5005385). Upon determining good cause, the sanction should have been terminated with the date the sanction was requested.

Recommendation:

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

2. We selected a random sample of two cases that were listed as Transitional in the Welfare Transition Program during the period January 1, 2024, through March 28, 2024, and utilized information on the 2023-2024 WTP Monitoring Tool developed by FloridaCommerce to inspect case files and determine whether the participants were eligible for the transitional services provided and cases were properly processed.

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

## AGENDA ITEM SUMMARY

<b>Title</b>	WIOA Local Four-Year Plan for 2024-2028
<b>Strategic Plans/Goals</b>	Administrative and Strategic Planning
<b>Policy/Plan/Law</b>	Workforce Innovation & Opportunity Act (WIOA); Role of LWDB's
<b>Action Requested</b>	None- Information Only
<b>Background</b>	<p>WIOA requires each local workforce development board (LWDB) to develop and deliver to the state a comprehensive four-year plan. These plans must be submitted in partnership with the local chief elected official. Regulations require states and LWDBs to regularly revisit and recalibrate state plan strategies in response to changing economic conditions and workforce needs of the state (20 CFR, Unified and Combined Plans Under Title I of the Workforce Innovation and Opportunity Act, (676.135).</p> <p>Local plans must address how LWDBs foster strategic alignment, improve service integration, and ensure the workforce system is industry-relevant, responding to the economic needs of the local workforce development area and matching employers with skilled workers. Services described in local plans must lead to greater efficiencies, reduce duplication, and maximize financial and human resources. These plan guidelines require LWDBs to address current and future strategies and efficiencies to address the continuous improvement of Florida's workforce system and its focus on customer service excellence.</p>
<b>Staff Recommendations</b>	None - Information Only
<b>Supporting Material</b>	None - Information Only
<b>Board Staff</b>	<p>Shelly Batton            Director of Programs  <a href="mailto:sbatton@careersourcerc.com">sbatton@careersourcerc.com</a>            (866) 482-4473 ext. 518</p>

## AGENDA ITEM SUMMARY

Title	CareerSource Research Coast (CSRC) Program Updates
Strategic Plans/Goals	Strategic Planning, Commitments, and Projects
Policy/Plan/Law	Workforce Development Board of the Treasure Coast By-Laws
Action Requested	None - Information only
Background	<p>The primary functions of the Program and Services Committee shall be to coordinate workforce development activities with regional economic development strategies and increase accountability by assuring that education and workforce development activities in the area are effective and relevant to current and future labor market needs.</p> <p>Staff will provide an update on CSRC programs and current initiatives.</p>
Staff Recommendations	None - Information Only
Supporting Material	None - Information Only
Board Staff	<p>Shelly Batton            Director of Programs  <a href="mailto:sbatton@careersourcerc.com">sbatton@careersourcerc.com</a>            (866) 482-4473 ext. 518</p>



## AGENDA ITEM SUMMARY

<b>Title</b>	Regional Planning Area (RPA) Update
<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>	None - Information Only
<b>Board Staff</b>	Shelly Batton Director of Programs <a href="mailto:sbatton@careersourcerc.com">sbatton@careersourcerc.com</a> (866) 482-4473 ext. 518

collaborate.  
innovate.  
lead.

## AGENDA ITEM SUMMARY

<b>Title</b>	Hope Florida Program Update
<b>Strategic Plans/Goals</b>	Optimal Use of Resources
<b>Goals/Policy/Law</b>	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's
<b>Action Requested</b>	None - Information Only
<b>Background</b>	<p><b>Hope Florida - A Pathway to Prosperity:</b> Uniting communities through Hope Navigators to guide Floridians on an individualized path to prosperity, economic self-sufficiency, and hope.</p> <p>Spearheaded by First Lady Casey DeSantis and implemented by the Florida Department of Children and Families, Hope Florida utilizes Hope Navigators to guide Floridians on an individualized path to prosperity, economic self-sufficiency, and hope by focusing on community collaboration between the private sector, the faith-based community, nonprofits, and government entities to break down traditional community silos, to maximize resources and uncover opportunities.</p>
<b>Staff Recommendations</b>	None - Information Only
<b>Supporting Material</b>	None - Information Only
<b>Board Staff</b>	<p>Shelly Batton Director of Programs <a href="mailto:sbatton@careersourcerc.com">sbatton@careersourcerc.com</a> (866) 482-4473 ext. 518</p>

## AGENDA ITEM SUMMARY

<b>Title</b>	TANF Summer Youth Program 2024
<b>Strategic Plans/Goals</b>	Clear, Credible, and Trustworthy Commitments and Projects
<b>Policy/Plan/Law</b>	N/A
<b>Action Requested</b>	None - Information Only
<b>Background</b>	<p>CareerSource Research Coast is committed to improving the lives of youth in our Local Workforce Development Area (LWDA). Wherever possible, CSRC engages in special initiatives to assist area youth with work-readiness skills and work-based learning opportunities.</p> <p>To that end, CSRC is facilitating a TANF Summer Youth Program.</p>
<b>Staff Recommendations</b>	None - Information Only
<b>Supporting Materials</b>	None - Information Only
<b>Board Staff</b>	Shelly Batton Director of Programs <a href="mailto:sbatton@careersourcerc.com">sbatton@careersourcerc.com</a> (866) 482-4473 ext. 518