



Board of Directors

MEETING AGENDA

Meeting Details

Date: Wednesday, September 25,

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: 290 666 77#

Phone: 1-772-800-5467

URL: [Join the meeting now](#)

Opening Remarks

1. Welcome & Call to Order
2. Pledge of Allegiance
3. Roll Call and Attendance (Page 3)
 - a. Board Members
 - b. Staff
4. Declarations of Conflict of Interest (Pages 4-6)
5. Florida Department of Commerce (FLORIDACOMMERCE) Program Year (PY) 2023-2024 Programmatic & Financial Compliance Monitoring Review Annual Performance (Page 7)

Voting Item

6. Consent Agenda (Pages 8-9)
 - a. Review and Approve June 26, 2024, Board of Directors Meeting Minutes (Pages 10-20)
 - b. Review and Approve July 16, 2024, Youth Council Meeting Minutes (Pages 21-24)
 - c. Review and Approve August 16, 2024, Executive Committee Meeting Minutes (Pages 25-28)
 - I. Review and Approve May and June Financial Report - PY 2023-2024 (Pages 29-35)
 - d. Review and Approve August 28, 2024, Program and Services Committee Meeting Minutes (Pages 36-41)
 - e. Review and Approve September 13, 2024, Executive Committee Meeting Minutes (Pages 42-48)
 - I. Review and Approve July Financial Reports - PY 2024-2025 (Pages 49-54)
 - II. Review and Approve Wagner Peyser (WP) - Job Seeker Registration Application and Services Policy Revisions (Page 55)



- III. Review and Approve Wagner Peyser (WP) - Job Orders and Placement Policy Revisions (Page 56)
 - IV. Review and Approve Welfare Transition (WT) Program - Supportive Services Policy Revisions (Page 57)
 - V. Review and Approve Workforce Innovation Opportunity Act (WIOA) - Adult/Dislocated Worker (DW) Supportive Services Policy Revisions (Page 58)
 - VI. Review and Approve Workforce Innovation Opportunity Act (WIOA) - Eligible Training Provider List Policy Revisions (Page 59)
 - VII. Review and Approve Workforce Innovation Opportunity Act (WIOA) - Adult/DW Program Eligibility Policy Revisions (Page 60)
7. Review and Approve Workforce Innovation Opportunity Act (WIOA) - Youth Services Subrecipient Contract Renewal - PY2024-2025 (Pages 61-98)
 8. Review and Approve Local Targeted Occupations List (LTOL) - 2nd Quarter PY 2024-2025 (Pages 99-103)
 9. Review and Approve Acceptance of the Florida Department of Commerce (FLORIDACOMMERCE) Grantee/Subgrantee Agreement - PY 2024-2027 (Page 104)
 10. Review and Approve WIOA Local and Regional Workforce Plan Draft - PY 2025-2028 (Page 105)
 11. Review and Approve Florida Department of Commerce (FLORIDACOMMERCE) Internal Control Questionnaire (ICQ) and Assessment - PY 2024-2025 (Page 106)
 12. Review and Approve Acceptance of LWDB20 Proposed Primary Indicators of Performance - PY2024 and 2025 (Pages 107-109)
 13. Review and Approve Prasanth Pilly as Designee for Timothy Moore, President, of Indian River State College (Pages 110-111)

Information/Discussion

14. Primary Indicators of Performance 4th Quarter - PY 2023-2024 (Page 112-113)
15. One-Stop Operator Quarterly Report 4th Quarter - PY 2023-2024 (Pages 114-119)
16. Workforce Readiness Taskforce Quarterly Report (Page 120)
17. Chair's Report (Page 121)
 - a. Board of Directors Member Orientation for PY 2024-2025 - Update
 - b. Board Member Participation in the Programs and Services Committee and the Youth Council
18. President's Report (Page 122)
 - a. Workforce Professional Development Summit - September 8-11, 2024
 - b. CareerSource Research Coast Reorganization - PY 2024-2025
19. Open to the Board (Page 123)
20. Open to the Public (Page 124)
21. Adjournment - Next Board of Directors Meeting January 29, 2024



**BOARD OF DIRECTORS MEETING
AGENDA
ATTENDANCE ROSTER
JULY 1, 2024 - JUNE 30, 2025**

#	BOARD MEMBER		09/25	01/29	04/30	06/25	Total
1	Werner	Bols					
2	Jim	Brann - Chair					
3	Pamela	Burchell					
4	Jose	Capellan					
5	Helene	Caseltine					
6	Bob	Cenk					
7	Comm Larry	Leet					
8	David	Freeland					
9	Jon Aliesha	Prince Seitz (Designee)					
10	Mike	Kauffmann					
11	Leslie	Kristof - Past Chair					
12	Michael Tracey	Maine Miller (Designee)					
13	Dr. Tim Prasanth	Moore Pilly (Designee)					
14	Terrance	Moore					
15	Dr. David Christie	Moore Shields (Designee)					
16	Wayne	Olson					
17	Lorna	Landherr					
18	Pete	Tesch					
19	David	Bean					
20	Will	Armstead					
21	Kevin	Staten					
22	Terissa	Aronson					
23	Kelly	Johnson					
24	Deb	Frazier					
#	ADMINISTRATIVE STAFF		09/25	01/29	04/30	06/25	Total
1	Brian	Bauer					
2	Tracey	McMorris					
3	Lisa	Delligatti					
4	Shelly	Batton					
5	Martin	Rivera/IT Dept					
5	Jennifer	Eimann					

T – Attended Virtually X – Attended In-Person E – Excused U - Unexcused

AGENDA ITEM SUMMARY

Title	Declarations of Conflict of Interest
Strategic/Plans/Goals	N/A
Policy/Plan/Law	Public Law 105-220
Action Requested	None - Information Only
Background	In the event that a conflict of interest arises due to business or employment interests of associates or close family members, a Regional Workforce Development Board member would be required to reveal that conflict, refrain from voting on the issue and file a memorandum of voting conflict Commission Form 8B
Staff	
Recommendations	None - Information Only
Supporting Material	Conflict of Interest Statement Form, 8B Memorandum of Voting Conflict
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

FORM 8B MEMORANDUM OF VOTING CONFLICT FOR COUNTY, MUNICIPAL, AND OTHER LOCAL PUBLIC

LAST NAME – FIRST NAME – MIDDLE NAME	NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE
MAILING ADDRESS	THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input type="checkbox"/> OTHER LOCAL AGENCY
CITY COUNTY	NAME OF POLITICAL SUBDIVISION:
DATE ON WHICH VOTE OCCURRED	MY POSITION IS <input type="checkbox"/> ELECTIVE <input type="checkbox"/> APPOINTIVE

WHO MUST FILE FORM 8B

This form is for use by any person serving at the county, city, or other local level of government on an appointed or elected board, council, commission, authority, or committee. It applies equally to members of advisory and non-advisory bodies who are presented with a voting conflict of interest under Section 112.3143, Florida Statutes.

Your responsibilities under the law when faced with voting on a measure in which you have a conflict of interest will vary greatly depending on whether you hold an elective or appointive position. For this reason, please pay close attention to the instructions on this form before completing the reverse side and filing the form.

INSTRUCTIONS FOR COMPLIANCE WITH SECTION 112.3143, FLORIDA STATUTES

A person holding elective or appointive county, municipal, or other local public office **MUST ABSTAIN** from voting on a measure which inures to his or her special private gain or loss. Each elected or appointed local officer also is prohibited from knowingly voting on a measure which inures to the special gain or loss of a principal (other than a government agency) by whom he or she is retained (including the parent organization or subsidiary of a corporate principal by which he or she is retained); to the special private gain or loss of a relative; or to the special private gain or loss of a business associate. Commissioners of community redevelopment agencies under Sec. 163.356 or 163.357, F.S., and officers of independent special tax districts elected on a one-acre, one-vote basis are not prohibited from voting in that capacity.

For purposes of this law, a "relative" includes only the officer's father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, and daughter-in-law. A "business associate" means any person or entity engaged in or carrying on a business enterprise with the officer as a partner, joint venture, co-owner of property, or corporate shareholder (where the shares of the corporation are not listed on any national or regional stock exchange).

ELECTED OFFICERS:

In addition to abstaining from voting in the situations described above, you must disclose the conflict:

PRIOR TO THE VOTE BEING TAKEN by publicly stating to the assembly the nature of your interest in the measure on which you are abstaining from voting; and

WITHIN 15 DAYS AFTER THE VOTE OCCURS by completing and filing this form with the person responsible for recording the minutes of the meeting, who should incorporate the form in the minutes.

APPOINTED OFFICERS:

Although you must abstain from voting in the situations described above, you otherwise may participate in these matters. However, you must disclose the nature of the conflict before making any attempt to influence the decision, whether orally or in writing and whether made by you or at your direction.

IF YOU INTEND TO MAKE ANY ATTEMPT TO INFLUENCE THE DECISION PRIOR TO THE MEETING AT WHICH THE VOTE WILL BE TAKEN:

- You must complete and file this form (before making any attempt to influence the decision) with the person responsible for recording the minutes of the meeting, who will incorporate the form in the minutes. (Continued on other side)

APPOINTED OFFICERS (continued)

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

DISCLOSURE OF LOCAL OFFICER'S INTEREST

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

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

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

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

_____ Date Filed

_____ Signature

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

AGENDA ITEM SUMMARY

Title	Florida Department of Commerce (FLORIDACOMMERCE) Program Year (PY) 2023-2024 Programmatic and Financial Compliance Monitoring Review Annual Performance
Strategic Plans/Goals	Effective Utilization of Current and Timely Operational Intelligence for all Stakeholders
Policy/Plan/Law	DEO Grantee/Sub-Grantee Agreement, CSRC Administrative Plan
Action Requested	None - Information Only
Background	Florida Department of Commerce's (FLORIDACOMMERCE) Program Year (PY) 2023-2024 Programmatic and Financial Compliance Monitoring Review will focus on the LWDB's compliance with State and federal expenditure requirements, programmatic and fiscal monitoring results, and WIOA performance results.
Staff Recommendations	None - Informational Only
Supporting Material	Programmatic and Financial Compliance Monitoring Review Annual Performance
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

AGENDA ITEM SUMMARY

Title	Consent Agenda
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Board By-Laws
Action Requested	Approve Consent Agenda as Presented
Background	<p>Consent Agenda</p> <ul style="list-style-type: none"> a. Review and Approve June 26, 2024, Board of Directors Meeting Minutes b. Review and Approve July 16, 2024, Youth Council Meeting Minutes c. Review and Approve August 16, 2024, Executive Committee Meeting Minutes <ul style="list-style-type: none"> I. Review and Approve May and June Financial Report - PY 2023-2024 d. Review and Approve August 28, 2024, Program and Services Committee Meeting Minutes e. Review and Approve September 13, 2024, Executive Committee Meeting Minutes <ul style="list-style-type: none"> I. Review and Approve July Financial Reports - PY 2024-2025 II. Review and Approve Wagner Peyser (WP) - Job Seeker Registration Application and Services Policy Revisions III. Review and Approve Wagner Peyser (WP) - Job Orders and Placement Policy Revisions IV. Review and Approve Welfare Transition (WT) Program - Supportive Services Policy Revisions V. Review and Approve Workforce Innovation Opportunity Act (WIOA) - Adult/Dislocated Worker (DW) Supportive Services Policy Revisions

- VI. Review and Approve Workforce Innovation Opportunity Act (WIOA) - Eligible Training Provider List Policy Revisions
- VII. Review and Approve Workforce Innovation Opportunity Act (WIOA) - Adult/DW Program Eligibility Policy Revisions

Staff Recommendation Review and Approve Consent Agenda Items as presented

Supporting Material Meeting Minutes, Financial Statements, Board/Committee Meeting Minutes, Financial Reports, Link to Policy Revisions: [Executive-Committee-Meeting-Packet-9-13-2024.pdf \(secureserver.net\)](#)

Board Staff Brian Bauer
President/CEO
bbauer@careersourcerc.com
(866) 482-4473 ext. 418

Agenda Item 6a Board of Directors Meeting Minutes

June 26, 2024

Meeting Agenda

1. Welcome & Call to Order
2. Pledge of Allegiance
3. Roll Call and Attendance
 - a. Board
 - b. Staff
4. Declarations of Conflicts of Interest
5. Installation of Officers - Michelle Miller, Clerk of Court, St. Lucie County

Voting Items

6. Consent Agenda
 - a. Review and Approve April 24, 2024, Board of Directors Meeting Minutes
 - b. Review and Approve May 17, 2024, Executive Committee Meeting Minutes
 - i. Review and Approve Financial Statements - March 2024
 - ii. Review and Approve Board/Committee Schedule - PY 2024-2025
 - iii. Review and Approve CSRC Paid Holidays/Compressed Work Schedule - PY 2024-2025
 - c. Review and Approve May 21, 2024, Youth Council Meeting Minutes
 - d. Review and Approve May 29, 2024, Program and Services Committee Meeting Minutes
 - e. Review and Approve June 14, 2024, Executive Committee Meeting
 - I. Review and Approve April Financial Report - 2023-2024
 - II. Review and Approve Renewable Vendor Contracts - PY 2024-2025
 - Manpower
 - Spherion
 - Taylor, Hall, Miller, Parker (THMP)
 - Ward Damon, Attorneys at Law
 - James Moore, CPA
7. Review and Approve Board Member Contract/COI Exemption Requests - PY 2024- 2025
8. Review and Approve Draft Budget PY 2024-2025
9. Review and Approve Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs - PY 2024-2024

10. Review and Approve Comprehensive One-Stop Career Center Memorandum of Understanding (MOU) and Infrastructure Agreement (IFA)
11. Review and Approve Risk Evaluation Form Subrecipient Services Workforce Coordination Consulting OSO Contract PY2024-2025
12. Review and Approve Risk Evaluation Form Subrecipient Services - WIOA Youth Services - PY 2024-2025
13. Local Workforce Development Area Designation-CSF Policy 94
14. Review and Approve Proposed Local Targeted Occupations List (LTOL) 1st Quarter - PY 2024-2025
15. Review and Approve Training Provider Recommendation - Sage Commercial Driving Scholl (CDLA)
16. Review and Approve WIOA - Policy Revisions
 - a. Review and Approve WIOA - Individual Training Account Policy Revisions
 - b. Local Targeted Occupations List Policy Revisions

Information/Discussion

17. Workforce Readiness Taskforce Quarterly Report
18. Primary Indicators of Performance 3rd Quarter - PY 2023-2024
19. Chair’s Report
 - a. CSFL Hope Florida Initiative - Employer Outreach
 - b. Board of Directors Member Orientation - PY 2024-2025
 - c. Four-Year Plan Strategic Planning Session - July 26, 2024 (Cancel July 12th Executive Meeting)
20. President’s Report
 - a. Board of Directors Membership Recertification - PY 2023-2024
 - b. Regional Planning Area Update
 - c. CareerSource Florida (CSFL) Updates
 - i. CSFL Administrative Policy 074
 - ii. CSFL Board/Council Meetings Update - June 17-18, 2024
 - iii. Form 1 - Due by July 1, 2024
21. Open to the Board
22. Open to the Public
23. Adjournment - Next Meeting September 25, 2024

Members Present

Leslie Kristof	Jim Brann	Will Armstead
Werner Bols	Helene Caseltine	

Members Participating by Teleconference

Pamela Burchell	Pete Tesch	Aliesha Seitz
Tracey Miller	Terrance Moore	Christie Shields

Members Excused

Jose Capellan	Bob Cenk	Larry Leet
David Freeland	Michael Kauffmann	Timothy Moore
Wayne Olson	Kevin Staten	Dori Stone
Maddie Williams	Lorna Landherr	Kelly Johnson
Kevin Staten		

Public in Attendance

Michelle Miller	Deb Frazier
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Administrative Staff Participating In-person/Teleconference

Brian Bauer	Tracey McMorris	Shelly Batton
Martin Rivera/IT	Jennifer Eimann	

Call to Order

Leslie Kristof, Chair, called the meeting to order at 8:05 a.m. The Board recited the Pledge of Allegiance. A quorum was established.

Agenda Item 4 - Declarations of Conflicts of Interest (COI):

Leslie Kristof, Chair, asked board members for any potential conflict of interest for the agenda, excluding Agenda Item 7 - Board Member Contract/COI Exemption Requests. No conflicts of interest were declared.

Agenda Item 5 - Installation of Officers:

Brian Bauer, President/CEO, presented the slate of officers of the Workforce Development Board of the Treasure Coast for the 2024-2025 Program Year:

Jim Brann - Chair
William Armstead - Vice-Chair

Michelle Miller, Clerk of Court, St. Lucie County, swore in Jim Brann as Chair and William Armstead as Vice Chair.

Mr. Bauer thanked Leslie Kristof for her service as Chair and presented her with a token of appreciation.

The gavel was passed to Jim Brann, the new Chairperson of the Treasure Coast Workforce Development Board, dba CareerSource Research Coast.

Agenda Item 6 - Consent Agenda:

Jim Brann, Chair, presented the Consent Agenda and asked members if any items needed further discussion.

With no further discussion, Werner Bols moved to approve the Consent Agenda as presented. William Armstead seconded the motion, which passed unanimously.

Agenda Item 7 - Review and Approve Board Member Contract/COI Exemption Requests - PY 2022- 2023:

Bauer, President/CEO, stated that annually, the LWDBs are required to submit a waiver and disclosure statement for all board members who receive workforce-related services and/or approved contracts/agreements. Exceptions to contracting with board members include workforce training services offered by CSRC, such as Work Experience, OJT, and ITA. These services include training providers, On-the-Job-Training contracts for private businesses, and Facility Use Agreements.

Any contract must be approved by two-thirds of the board members, with a quorum having been established. Before execution, any contract over \$10,000 must have prior approval by the Florida Department of Commerce (FLORIDACOMMERCE). Prior approval is not required for contracts under the \$10,000 threshold.

Contracts with a Board Member receiving a grant for workforce services are as follows:

A motion was made by Leslie Kristof and seconded by Werner Bols to approve any/all potential OJT contracts as stated in the OJT agreement with Cleveland Clinic Indian River not to exceed \$150,000. The motion was passed with board member Lorna Landherr completing a Disclosure and Certification of Conflict of Interest in a Contract, as she did not attend the meeting.

A motion was made by Helene Caseltine and seconded by Werner Bols to approve any/all potential student training vouchers as stated in the training provider agreement with Indian River State College not to exceed \$150,000. The motion was passed with board member Dr. Timothy Moore completing a Disclosure and Certification of Conflict of Interest in a Contract, as he did not attend the meeting.

A motion was made by William Armstead and seconded by Helene Caseltine to approve any/all potential student training vouchers as stated in the training provider agreement with Keiser University not to exceed \$150,000. The motion was passed with Leslie Kristof abstaining.

A motion was made by Helene Caseltine and seconded by Leslie Kristof to approve any/all potential student training vouchers as stated in the training provider agreement with Treasure Coast Technical College not to exceed \$50,000. The motion was passed with Christie Shields, Designee, abstaining, and board member Dr. David Moore completing a Disclosure and Certification of Conflict of Interest in a Contract, as he did not attend the meeting.

A motion was made by Werner Bols and seconded by William Armstead to approve any/all potential OJT contracts as stated in the OJT agreement with The Porch Factory not to exceed \$30,000. The motion was passed with Jim Brann abstaining.

A motion was made by Werner Bols and seconded by Helene Caseltine to approve the worksite agreement/contract with Moore Solutions, Inc. not to exceed \$10,000. The motion was passed with Terrance Moore abstaining.

A motion was made by Leslie Kristof and seconded by Helene Caseltine to approve the facilities use agreement/contract with St. Lucie Public Schools not to exceed \$20,000. The motion was passed with Aliessa Seitz, Designee, abstaining, and Board member Dr. Jon Prince completing a Disclosure and Certification of Conflict of Interest in a Contract, as he did not attend the meeting.

A motion was made by Leslie Kristof and seconded by Helene Caseltine to approve the facilities use agreement/contract with Treasure Coast Technical College not to exceed \$10,000. The motion was passed with Christie Shields, Designee, abstaining, and board member Dr. David Moore completing a Disclosure and Certification of Conflict of Interest in a Contract, as he did not attend the meeting.

A motion was made by Helene Caseltine and seconded by Werner Bols to approve any/all potential student training vouchers as stated in the training provider agreement with Boys & Girls Club of St. Lucie County not to exceed \$ 60,000. The motion was passed with William Armstead abstaining.

A motion was made by Werner Bols and seconded by Helene Caseltine to approve any/all potential OJT contracts as stated in the OJT agreement with RV Johnson Insurance not to exceed \$10,000. The motion was passed with board member Kelly Johnson completing a Disclosure and Certification of Conflict of Interest in a Contract, as she did not attend the meeting.

A motion was made by William Armstead and seconded by Helene Caseltine to approve any/all potential OJT contracts as stated in the OJT agreement with Walmart Distribution Center 7038 not to exceed \$30,000. The motion was passed with board member David Bean completing a Disclosure and Certification of Conflict of Interest in a Contract, as he did not attend the meeting.

Agenda Item 8 - Review and Approve Draft Budget PY 2024-2025:

Brian Bauer, President/CEO, presented the preliminary funding allocations for PY 2024-2025 and explained that the proposed budget was approved at the June 11, 2024, Treasure Coast Workforce Consortium meeting and wanted to highlight the following:

- Total Funding Allocations for PY 24-25 - \$5,408,676
- Overall funding decrease of 19% for PY 24-25
- Dislocated Worker Carry-Forward for PY 25-26 - \$152,781
- Hope Navigator Grant - ends June 30, 2025

Mr. Bauer noted that historically, the Dislocated Worker (DW) carry-forward monies have totaled closer to \$700,000. As a result, the executive team will need to closely monitor the available carry-forward for PY25-26 and make fiscal decisions accordingly.

With no further discussion, Werner Bols moved to approve the Draft Budget - PY 2024-2025, as presented. William Armstead seconded the motion, which passed unanimously.

Agenda Item 9 - Review and Approve Prior Approval Transfer Request Forms - WIOA Adult and Dislocated Worker (DW) Programs - PY 2023-2024:

Brian Bauer, President/CEO, explained that the Florida Department of Commerce (FLORIDACOMMERCE) and the State Workforce Development Board grant the authority, on behalf of the Governor, to allow Local Workforce Development Boards to transfer up to and 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 that any transfer of funds between WIOA programs complies with federal law and to record and document their use and application of local funds.

LWDB 20 anticipates fully expending the WIOA Adult - 2024 funding prior to June 2025 and requests the ability to utilize \$810,500 of WIOA DLW - 2023 funding to be spent on PY24-25 WIOA Adult expenditures. In addition, the LWDB 20 anticipates fully expending the WIOA Adult - 2024 funding prior to June 2025 and requests the ability to utilize \$502,000 of WIOA DLW - 2024 funding to be spent on PY24-25 WIOA Adult expenditures.

With no further discussion, Leslie Kristof moved to approve the Prior Approval Transfer Request Forms - WIOA Adult and Dislocated Worker (DW) Programs - PY 2024-2025, as presented. Werner Bols seconded the motion, which passed unanimously.

Agenda Item 10 - Review and Approve Review and Approve Comprehensive One-Stop Career Center Memorandum of Understanding (MOU) and Infrastructure Agreement (IFA):

Brian Bauer, President/CEO, explained that the LWDB is required by law to review and approve our comprehensive one-stop career center MOU and associated infrastructure funding agreement (IFA) every three years for our mandatory partners: Indian River State College, AARP, FLDOE Division of Blind Services, FLDOE Division of Vocational Rehabilitation, and St. Lucie County Community Services.

The MOU is an agreement that details the operations of the local one-stop delivery system, the provision of programs and services, and the apportionment of costs. The infrastructure funding agreement outlines costs incurred by those mandatory partners who are being reimbursed to the LWDB.

With no further discussion, William Armstead moved to approve the Comprehensive One-Stop Career Center Memorandum of Understanding (MOU) and Infrastructure Agreement (IFA), as presented. Werner Bols seconded the motion, which passed unanimously.

Agenda Item 11 - Review and Approve Risk Evaluation Form Subrecipient Services Workforce Coordination Consulting OSO Contract PY2024-2025:

Brian Bauer, President/CEO, stated that based on the financial and programmatic risk evaluation forms for subrecipient services from our one-stop operator, Workforce Coordination Consulting, LLC., is being recommended for renewal for PY 24-25.

With no further discussion, Werner Bols moved to approve the Risk Evaluation Form Subrecipient Services - Workforce Coordination Consulting OSO Contract - PY2024-2025, as presented. William Armstead seconded the motion, which passed unanimously.

Agenda Item 12 - Review and Approve Risk Evaluation Form Subrecipient Services - WIOA Youth Services - PY 2024-2025:

Brian Bauer, President/CEO, stated that CareerSource Research Coast (CSRC) entered into a multiple-year sub-recipient procurement to provide WIOA Youth Services.

CSRC staff will recommend to the board, based on fiscal integrity and performance, that the WIOA Youth Services contract with Eckerd Connects be renewed for PY 2024-2025.

With no further discussion, Leslie Kristof moved to approve the Risk Evaluation Form and contract for Subrecipient Services - WIOA Youth Services - PY 2024-2025, as presented. Werner Bols seconded the motion, which passed unanimously.

Agenda Item 13 - Application for Subsequent Local Workforce Development Area (LWDA) Designation - PY2024 & PY2025:

Brian Bauer, President/CEO, explained that this application recertifies board membership for PY2024 & PY2025. Under WIOA, the Governor must designate local workforce development areas after consultation with the State Workforce Board, CareerSource Florida, Chief Local Elected Officials (CLEO), and the Local Workforce Development Boards.

LWDAs that received an initial designation shall be granted a subsequent designation if, for the two most recent program years, the LWDA performed successfully and sustained financial integrity.

With no further discussion, Leslie Kristof moved to approve the Application for Subsequent Local Workforce Development Area (LWDA) Designation - PY2024 & PY2025, as presented. Werner Bols seconded the motion, which passed unanimously.

Agenda Item 14 - Review and Approve Local Targeted Occupations List (LTOL) for the 1st Quarter of PY 2024-2025:

Brian Bauer, President/CEO, explained that the Statewide Demand Occupations list identifies the labor market needs of Florida's business community and encourages job training based on those needs, with emphasis on jobs that are both high demand and high skill/high wage and is used as a baseline for establishing the Local Targeted Occupations Lists (LTOLs). The Local Workforce Development Boards (LWDBs) develop and use their LTOLs to identify occupations for which eligible adults and dislocated workers may receive training assistance under the Workforce Innovation and Opportunity Act.

Staff reviewed local labor market information and resources regarding the LTOL. Three occupations, Chief Executive, Financial Risk Specialist, and Medical Dosimetrist are recommended to be deleted from the 1st Quarter of the PY 2024-2025 list. Staff recommends approval of this LTOL for the 1st Quarter of PY 2024-2025.

With no further discussion, Helene Caseltine moved to approve the Local Targeted Occupations List for the 1st Quarter of PY 24-25, as presented. Werner Bols seconded the motion, which passed unanimously.

Agenda Item 15 - Review and Approve Training Provider Recommendation - Sage Commercial Driving School (CDLA):

Brian Bauer, President/CEO, explained that training services providers may apply for initial eligibility by completing a CareerSource Research Coast (CSRC) application for inclusion on the local list of eligible training providers. Applications are reviewed by a team of at least three members, comprised of CSRC staff and/or Board members, to confirm that all required documentation is provided and that minimal performance levels have been met. If the review team determines the provider has submitted all required documentation and met minimal performance levels, the application will be reviewed by a rating team based on a 100-point scale. The average score of the team must be seventy-five for the application to be presented for approval.

Based on the rating team's metrics, the team recommended that Sage Commercial Driving School (CDLA) be added to the Eligible Training Provider List (ETPL).

With no further discussion, Helene Caseltine moved to approve the Training Provider Recommendation, as presented. Christie Shields seconded the motion, which passed unanimously.

Agenda Item 16 - Review and Approve WIOA - Policy Revisions:

Brian Bauer, President/CEO, stated that there are two policies with revisions being put forth for review and approval by the board.

1. WIOA - Individual Training Account Policy Revisions
2. Local Targeted Occupations List Policy Revisions

Mr. Bauer explained that the Workforce Innovation and Opportunity Act (WIOA) requires that individuals be provided an Individual Training Account (ITA) to pay for tuition, books, and fees related to occupational skills training accessed through an approved training provider.

CareerSource Florida requires that local boards establish policies related to the value of the ITA, cancellation, transferability, and limits that apply to these accounts.

Due to increased performance accountability regarding ITA spending in an environment with reduced demand for funding for classroom training, staff has revised the policy to raise the minimum investment of \$5000 to \$7500, which will allow CSRC to cover more training expenses for clients served.

With no further discussion, Helene Caseltine moved to approve the Training Provider Recommendation, as presented. William Armstead seconded the motion, which passed

unanimously.

Agenda Item 17 - Workforce Readiness Taskforce Quarterly Report:

Christina Coble, Business Services Manager, provided an update on the Workforce Readiness Taskforce meeting held on June 6, 2024.

Ms. Coble stated that the task force discussed the local workforce development board's labor market information for Martin, St. Lucie, and Indian River Counties. As part of the work being done by staff on the four-year plan and the regional planning area, the LMI assists in determining future workforce training needs, identifying labor availability, ascertaining prevailing wage rates, and exploring potential markets.

Christi Shields, Director of Treasure Coast Technical College, discussed the master credentials list and the potential implications of certifications slated for deletion in 2025-2026, particularly for the healthcare and food service industries.

Ms. Shields stated that the Master Credentials List application is open year-round for Florida school districts, Florida College System institutions, and local workforce development boards to submit credentials for consideration and remove those no longer eligible.

Ms. Shields stated that two certifications, nursing assistant and safe serve safe, are up for deletion in 2025-2026 from the master credential list.

After further discussion, the Workforce Readiness Task Force proposed involving industry partners in assessing how these changes could impact credentialing requirements for hiring purposes. The discussion also revolved around the impending September 30, 2024, deadline for credential applications and the potential addition of new certifications aligned with employer needs.

Ms. Coble stated that we had just received instructions from the state regarding the four-year plan. Tracey McMorris, Vice President of Operations/COO, has taken the lead in that process and has identified Shelly Batton, Colleen Gill, and Christina Coble to work with on all data collection.

Agenda Item 18 - Primary Indicators of Performance 3rd Quarter PY 2023-2024:

Brian Bauer, President/CEO, presented the Primary Indicators of Performance for the 3rd Quarter of PY 2023-2024. Mr. Bauer explained that the areas highlighted in blue reflect those performance goals exceeded (greater than 100% of negotiated). Likewise, goals highlighted in green show that performance goals were met (90-100% negotiated), and those reflected in yellow still need to be met (less than 90% of negotiated) by CSRC.

The numbers reflected in all categories of the report show the LWDB 20 has either met or exceeded all performance goals except under Youth, Credential Attainment. Mr. Bauer stated that staff has worked hard to meet the negotiated performance targets and that strategic operational steps will continue to ensure all performance goals are met.

Agenda Item 19 - Chairs Report:

Jim Brann, Chair, presented the following information:

Hope Florida Pathway to Prosperity initiative: This initiative is spearheaded by First Lady Casey DeSantis and implemented by the Florida Department of Children and Families. Hope Florida is focused on guiding 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. Businesses can interact with the community in a way that benefits both parties by working with Hope Florida to fill job vacancies and assist individuals in becoming financially independent.

Mr. Brann stated that he would be sending a letter to all board members holding a business seat asking for their participation in this initiative. This initiative relies on the support of employers to connect individuals facing barriers to employment with supportive workplaces, creating opportunities for them to thrive in the workforce.

Board Member Annual Orientation: A reminder was given that the annual Board of Directors Orientation will be sent out by Jennifer Eimann, Executive Assistant, in early August. Board members can expect to receive access to the on-line orientation via their email.

Four-Year Plan Strategic Planning Session/Cancellation of July 12, 2024, Executive Committee Meeting:

After discussion, Mr. Brann approved canceling the July 12, 2024, Executive Committee meeting and announced July 26, 2024, as the date for a strategic planning session to further discuss the LWDB 20 four-year plan.

Tracey McMorris stated that all board members and One-Stop-Operator partners would receive an invitation to participate in this important event.

Agenda Item 20 - President's Report:

Brian Bauer, President/CEO, presented the following information:

Board of Directors Membership Recertification - PY 2024-2025: Mr. Bauer explained that board members shall be appointed for fixed and staggered terms and may serve until their successors are appointed. After the initial staggered terms, the terms of Workforce Development Board Members shall be four (4) years. Any vacancy in the membership of the Workforce Development Board shall be filled in the same manner as the original appointment. Members may be reappointed for successive terms if the sponsoring organization agrees or until their term limit of eight consecutive years is satisfied. Any member of the Workforce Development Board may be removed for cause in accordance with procedures established by the Workforce Development Board. Under the REACH Act, term limits have been set at eight years for Business members.

Brian Bauer, President/CEO, presented the following board members who were recertified as Directors to the Workforce Development Board of the Treasure Coast at the June 11, 2024, Treasure Coast Workforce Consortium meeting:

Helene Caseltine (BU/GRED), (BU), David Freeland (WOLO), Bob Cenk (BU), Leslie Kristof (BU/ETPC), David Moore (WOY/ ETPA), Terrance Moore (BU)
Deborah Frazier (B/U) - Filling seat vacated by Maddie Williams - TCBA

Appointment of Directors Nominated to the Workforce Development Board of the Treasure Coast: Mr. Bauer thanked Jim Brann for his work on the ad hoc search committee serving as the new board member liaison. As a result of Mr. Brann's and other board members' efforts, the following individuals were appointed as Directors to the Workforce Development Board of the Treasure Coast at the June 11, 2024, Treasure Coast Workforce Consortium meeting.

- Kelly Johnson - B/U
RV Johnson Insurance
- David Bean - B/U
Walmart Distribution Center
- Terissa Aronson, CEO/President - B/U
St. Lucie Chamber of Commerce

Agenda Item 21 - Open to the Board:

No further discussion from the board

Agenda Item 22 - Open to the Public:

No further discussion from the public

Agenda Item 23 - Adjournment

With no further items to discuss, Jim Brann, Chair, made a motion for adjournment. All members agreed, and the meeting was adjourned at 9:16 a.m.

The next Board of Directors Meeting will be held on September 25, 2024

STAFF CERTIFICATION

I hereby certify these minutes reflect the proceedings by the Board of Directors of CareerSource Research Coast, which have been reviewed by the Board and approved or approved with modifications that have been incorporated herein.

Brian Bauer
Board Secretary

Date



Agenda Item 6b Youth Council Meeting Minutes

July 16, 2024

Opening Remarks

1. Welcome & Attendance

Information/Discussion

2. LWDB 20 Primary Indicators of Performance -2nd Quarter PY 2023-2024
3. WIOA Youth Connections Performance Report - PY 2023-2024
4. Summer of Success Update
5. Youth Success Story Video
6. Adjournment

Members Participating by Teleconference:

William Armstead, Robert McPartlan, Alisha Seitz, Christie Shields, David Freeland, Tracey Miller, Prashanth Pilly

Members Present

Lorna Landherr, Sean Mitchell, Terrance Moore

Members Excused

Theresa Bishop, Margie Dotson, Freddie Woolfork

Members Unexcused

None

Other Attendees

Angie Strickland, Kimberly Grey

Staff Participating by Teleconference and On-Site

Shelly Batton, Gerard Butler/IT, Jennifer Eimann

Call to Order

Terrance Moore, Chair, called the meeting to order at 8:05 am.

Agenda Item 2 - LWDB 20 Primary Indicators of Performance - 2nd Quarter PY 2023-2024:

Shelly Batton, Director of Programs, presented the Primary Indicators of Performance for the 2nd Quarter of PY 2023-2024. Ms. Batton explained that the areas highlighted in blue reflect those performance goals exceeded (greater than 100% of negotiated). Likewise, goals highlighted in green show that performance goals were met (90-100% of negotiated), and those reflected in yellow still need to be met (less than 90% of negotiated) by CSRC.

The numbers reflected in all categories of the report show the LWDB 20 has either met or exceeded all performance goals. Ms. Batton stated that Eckerd staff had worked hard to meet the negotiated performance targets under the Youth category.

Agenda Item 3 - WIOA Youth Connections Performance Report - PY 2023-2024:

Angie Strickland, Program Manager, presented the WIOA Youth Connections Performance Report through April of PY 2023-2024.

Ms. Strickland shared the following performance measures for PY 2023-2024: Enrollments:

- Out of School Youth (OSY) Enrollments - On Track
Goal 53 Participants - YTD 56 OSY Enrolled
- In-School Youth (ISY) Enrollments - On Track
- Goal 17 Participants - YTD 13 ISY Enrolled
- Total Number of Enrollments - On Track
Goal 70 - YTD 59 Participants Enrolled
- % ISY Enrollments - Needs Improvement
Goal 25% - YTD 18.80% ISY Enrollments

Work Experience:

- Internship Placements - On Track
Goal 60 - YTD 43 Internship Placement
- Successful Internship Completions - Needs Improvement
Goal 51 - YTD 32 Successful Internship Completions
- Internship Completion Percentage - On Track
Goal 85% - YTD 74.40% Internship Completion Percentage
W/Ex Expenditures - Needs Improvement
Goal \$222,735.00 - YTD \$169,081.25

Ms. Strickland explained that the categories of % of ISY Enrollments and Successful Internship Completions still need improvements to meet the YTD performance measures.

Ms. Strickland stated that the staff was doing extensive outreach to increase ISY enrollments, connecting with educational partners and stakeholders in an effort to expand awareness of our services. By increasing ISY enrollments, the other categories will benefit as well. As a result, Ms. Strickland is very optimistic about successfully meeting the performance benchmarks for PY 2023- 2024.

Agenda Item 4 - Summer of Success (SOS) Program Update:

Shelly Batton, Director of Programs, stated that Christina Coble, Business Services Manager, is heading up the Summer of Success (SOS) program this year. Ms. Batton presented an update on the St. Lucie County (SLC) Summer of Success (SOS) Initiative in her absence.

Ms. Batton explained that the St. Lucie County Board of County Commissioners (SLCBOCC) funded this year's program, which combines in-classroom employability skills training through the Employment Readiness Program (Ready to Work) with work experience for SLC students through a four-week paid internship (up to 32 hours per week @ \$15.00/hour). CareerSource Research Coast is partnering with St. Lucie County, the Boys and Girls Club of St. Lucie County, TMx Aero, Endit!, and United Against Poverty to provide internship placements.

The online applications for this funding opened on April 15, 2024. Eighty-two individuals applied for 35 open spots. Note: Five of those spots are being held for the skilled trade boot camp.

The grant from the SLCBOCC will also help fund a project with Treasure Coast Manufacturing Association (TCMA), Treasure Coast Builders Association (TCBA), and their combined boot camp. Five individuals who complete the assigned boot camp successfully will be funded through this grant for a four-week internship, so the employer does not have to bear that cost.

Agenda Item 5 - Youth Success Story:

Angie Strickland, Program Manager, asked Terrance Moore, Chair, to share his Youth Success Story.

Mr. Moore explained that Ariel Krantz was enrolled in the Youth Connections program. Ms. Krantz applied for a Team Leader internship position with Moore Solutions and was accepted.

Mr. Moore stated that Ariel was very shy when she started the internship and was unsure of herself. Mrs. Moore, Director of Curriculum, took on a mentorship role with Ms. Krantz. They started to train her and encourage her through close mentoring. Ms. Krantz began to feel more confident and mastered the skills in which she was trained. Eventually, Ms. Krantz exceeded expectations. Eventually, she was hired as a full-time employee, and she currently heads a team and works closely with other stakeholders in education and business.

This is a true success story and a great example of how working with CareerSource Research Coast and the opportunities it presents can result in such positive outcomes.

Agenda Item 6 - Adjournment:

Having no other business, Terrance Moore adjourned the Youth Council meeting at 8:33 AM.

BOARD STAFF CERTIFICATION

I hereby certify these minutes reflect the proceedings by the Youth Council of CareerSource Research Coast, have been reviewed by the Board of Directors, and approved or approved with modifications which have been incorporated herein.

Shelly Batton
Board Staff

Date





Agenda Item 6C Executive Committee Meeting Minutes

August 16, 2024

Opening Remarks

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

Voting Items

3. Review and Approve May and June Financial Reports - PY2023-2024
4. Review and Approve Designee for Timothy Moore, President, Indian River State College
5. Review and Approve Individual Training Account (ITA) Waiver Request - PY 2024-2025

Information/Discussion

6. LWDB 20 Final Budget - PY 2024-2025
7. CareerSource Research Coast Administrative Plan - Draft
8. WIOA Four-Year Plan Development - Planning Sessions
9. CareerSource Research Coast - Employee Handbook
10. Updates:
 - Workforce Professional Development Summit - September 8-11, 2024
 - Board Member Orientation/Refresher
 - Regional Planning Area (RPA)
 - CareerSource Research Coast Reorganization - PY 2024-2025
11. Adjournment - Next Executive Meeting September 13, 2024

Members Participating In-Person

Bob Cenk William Armstead

Members Participating by Teleconference:

Terrance Moore Werner Bols Jim Brann

Members Excused

Leslie Kristof

Administrative Staff Present/Teleconference:

Brian Bauer Tracey McMorris Lisa Delligatti
Jennifer Eimann

Call to Order:

Jim Brann, Chair, called the meeting to order at 8:05 am. A quorum was established.

Agenda Item 2 - Declarations of Conflicts of Interest (COI):

Jim Brann, Chair, asked if there were any Conflicts of Interest, and none were declared.

Agenda Item 3 - Review and Approve Financial Statements - May and June 2023-2024:

Lisa Delligatti, CFO, stated the following amendments to the budget and monthly expenditures are as follows:

- Individual Training Accounts (ITA) are at 35%, which is 5% short of the 40% requirement
- The Pie Chart provided outlines the following expenditures for PY 24-25:
 - Salaries and Benefits: \$2,536,434
 - Training/Support/Incentive: \$313,636
 - Participant Wages: \$65,128
 - One-Stop Costs: \$422,455
 - Operating: \$710,918
 - Administrative: \$680,357
 - WIOA Youth Contract: \$756,710

A motion was made by Werner Bols to approve the Financial Statements for May and June 2024, as presented. Bob Cenk seconded the motion. The motion passed unanimously.

Agenda Item 4 - Review and Approve Designee for Timothy Moore, President, Indian River State College:

Brian Bauer, President/CEO, stated that the By-Laws of the Workforce Development Board permit mandatory board members to designate a single, high-ranking designee with decision-making authority from his/her organization to represent him/her at Board and/or at standing or Ad-Hoc committee meetings. Per the Board's By-Laws, Timothy Moore has requested that Prashanth Pilly represent him at the Board of Directors and Youth Council meeting when Dr. Moore is not available to attend. The Board must approve all designees.

A motion was made by Terrance Moore to approve the Designee for Michael Maine, Superintendent of Martin County Public Schools, as presented. William Armstead seconded the motion. The motion passed unanimously.

Agenda Item 5 - Review and Approve Individual Training Account (ITA) Waiver Request:

Brian Bauer, President/CEO, explained that CareerSource Florida allows Local Workforce Development Boards (LWDBs) to request a Waiver of the 50% ITA expenditure required under Florida Statute. The percentage of ITA expenditures to be reduced by a waiver request is in direct relationship to the reduction of the LWDB's program year budget.

Career Source Research Coast (CSRC) is requesting that our formal ITA Waiver Request of 35% be continued for the 2024-2025 program year.



A motion was made by William Armstead to approve the Individual Training Account (ITA) Waiver Request, as presented. Bob Cenk seconded the motion. The motion passed unanimously.

Agenda Item 6 - Review LWDB 20 Final Budget - PY 2023-2024:

Lisa Delligatti, CFO, presented the funding allocations for PY 2024-2025. Ms. Delligatti explained that each year, the Board approves a budget for the following program year.

Board Staff has received final allocations for the WIOA, Wagner Peyser, and Welfare Transition programs for PY 2024-2025. Based on this information, the finance department met with Executive Management staff and drafted a final budget to present to the Board of Directors. The Board will have the opportunity to approve the 2024-2025 final budget at the September 25, 2024 meeting.

Agenda Item 7 - CareerSource Research Coast Administrative Plan - Draft:

Brian Bauer, President/CEO, stated that CSRC's Administrative Plan was revised based on updated requirements stipulated in the DEO Grantee/Subgrantee agreement. Mr. Bauer stated that most revisions were language changes and edits to align with current guidance from our independent monitoring and a recent Office of Civil Rights monitoring.

Agenda Item 8 - WIOA Four-Year Plan Development - Planning Sessions:

Brian Bauer, President/CEO, stated that WIOA requires each local workforce development board (LWDB) to develop and deliver a comprehensive four-year plan to the state. 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).

The Administrative Plan addresses how LWDB20 will foster strategic alignment, improve service integration, and ensure the workforce system is industry-relevant. It responds to the economic needs of the local workforce development area and matches employers with skilled workers. Services described in the plan lead to greater efficiencies, reduce duplication, and maximize financial and human resources. The plan guidelines require the LWDB to address current and future strategies and efficiencies to address Florida's workforce system's continuous improvement and focus on customer service excellence.

Agenda Item 9 - CareerSource Research Coast - Employee Handbook:

Brian Bauer, President/CEO, stated that the handbook provides general information about the working conditions, benefits, and guidelines affecting your employment. It has been prepared for informational purposes and is not to be considered or construed as a contract of employment. CareerSource Research Coast may amend any or all information in this handbook as necessary. In addition, the information in this handbook is not a complete description of all CareerSource Research Coast benefits and procedures.



Agenda Item 10 - Updates:

- Workforce Professional Development (WPD) Summit—The summit will be held this year at the Renaissance Orlando at SeaWorld from September 9 to 11, 2024. CSRC is sending ten staff members this year.
- Board Member Orientation/Refresher - Mr. Bauer explained that we are currently working on our annual board member orientation, an annual requirement outlined in our sub-grantee agreement with the Department of Commerce (FLORIDACOMMERCE.). LWDB 20 is working with Taylor, Hall, Miller, and Parker (THMP) to update the orientation video with applicable documents for PY 2024-2025. The orientation video is expected to be sent out to Board members in September and should be completed by June 30, 2025.
- CareerSource Research Coast Reorganization—PY 2024-2025: Mr. Bauer announced that due to an approximately 18% funding reduction, LWDB 20 will be consolidated into one comprehensive center. This means we will close the Indian River Career and Martin County Career Centers effective October 2024. Likewise, the current administrative offices will also be closed. Mr. Bauer is working to finalize a new lease at Renaissance Business Park, Ft. Pierce, to house the one-stop comprehensive center.

Mr. Bauer explained that an all-staff meeting was called on September 8, 2024, and these changes and a reduction in the workforce (RIF) were announced. The RIF includes a minimum of six staff members and will take place on 9/30/2024.

Business will continue as usual, and all services will remain available to clients. Additional information will be provided to the board as we move forward.

Agenda 11 – Adjournment:

With no further items to discuss, a motion was made by Jim Brann, Chair, to adjourn the meeting, seconded by Werner Bols. The motion passed unanimously, and the meeting was adjourned at 8:53 a.m.

BOARD SECRETARY CERTIFICATION

I hereby certify that these minutes reflect the proceedings by the Executive Committee of CareerSource Research Coast, which have been reviewed by the Board of Directors and approved or approved with modifications incorporated herein.

Brian Bauer
Secretary

Date

Next Executive Meeting – October 11, 2024



AGENDA ITEM SUMMARY

Title	Review and Approve Financial Reports
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's
Action Requested	Review and Approve June Financial Reports - PY 2023-2024
Background	The Board approved the budget for PY 2024-2025. The Executive Committee regularly reviews budgets, all amendments to the budget, and monthly expenditures.
Staff Recommendations	Review and Approve June Financial Reports Monthly Financial Reports, Statement of Financial Position
Supporting Material	
Board Staff	Lisa Delligatti Chief Financial Officer ldelligatti@careersourcerc.com (866) 482-4473 ext. 430

LWDB 20
Summary of Funding and Expenditures
as of June 30, 2024

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	\$ 277,746	\$ 126,167	\$ 166,108	\$ 398,384	\$ 844,327	\$ 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)	\$ (82,541)	\$ (37,396)	\$ (58,704)	\$ (51,322)	\$ (257,000)	\$ -
Carryforward from PY 22-23		\$ 286,364	\$ 869,768	\$ 568,110	\$ 81,565	\$ 57,470	\$ 20,463	\$ 24,529	\$ 134,912	\$ 124,448	\$ -
TOTAL	\$ -	\$ 1,307,060	\$ 883,587	\$ 976,774	\$ 425,197	\$ 252,675	\$ 30,535	\$ 40,720	\$ 481,974	\$ 711,775	\$ 62,499
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		\$ 1,012,670	\$ 112,494	\$ 346,884	\$ 343,335	\$ 197,808	\$ 24,310	\$ 17,027	\$ 334,072	\$ 702,118	\$ 62,499
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	\$ 568,110	\$ 81,565	\$ 54,168	\$ 20,463	\$ 24,529	\$ 134,912	\$ 124,448	\$ -
TOTAL		\$ 1,299,034	\$ 982,262	\$ 914,994	\$ 424,899	\$ 251,976	\$ 44,773	\$ 41,556	\$ 468,984	\$ 826,566	\$ 62,499
% of Total Budgeted Funding Received		99.39%	111.17%	93.68%	99.93%	99.72%	146.63%	102.05%	97.30%	116.13%	0.00%
EXPENDITURES											
Administrative	\$ -	\$ 122,896	\$ 121,739	\$ 16,614	\$ 112,101	\$ 32,708	\$ 4,331	\$ 3,764	\$ 61,498	\$ 108,727	\$ 8,494
Salaries and Benefits	\$ 475,944	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 204,414	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (680,357)	\$ 313,683	\$ 32,428	\$ 16,614	\$ 10,947	\$ 32,708	\$ 4,331	\$ 3,764	\$ 61,498	\$ 108,727	\$ 8,172
Reclassification	\$ -	\$ (190,787)	\$ 89,310	\$ -	\$ 101,154	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 322
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ 1,176,138	\$ 860,523	\$ 898,380	\$ 312,798	\$ 219,268	\$ 40,442	\$ 37,792	\$ 407,487	\$ 717,840	\$ 54,005
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 756,710	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 263,130	\$ 1,025,140	\$ 110,049	\$ 21,005	\$ 25,189	\$ 133,702	\$ 6,209	\$ 6,445	\$ 278,598	\$ 426,044	\$ 41,545
Contract Labor	\$ -	\$ 29,905	\$ 11,525	\$ -	\$ 87	\$ 28,530	\$ 36	\$ 33	\$ 26,459	\$ 44,637	\$ 421
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,750	\$ -
Support Services Non-ITA	\$ -	\$ 50	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,646	\$ -
Support Services ITA	\$ -	\$ 6,776	\$ 335	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 537	\$ -
Training-ITA/OST/TAA	\$ -	\$ 264,306	\$ 34,749	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 75	\$ -
Training-OJT	\$ -	\$ 258,743	\$ 7,558	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ 17,097	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 1,283	\$ 8,764	\$ 991	\$ 767	\$ 2,297	\$ 1,413	\$ 6,575	\$ 2,851	\$ 2,172	\$ 4,320	\$ 557
One Stop Shared Costs	\$ -	\$ 141,461	\$ 15,978	\$ 1,093	\$ 42,084	\$ 23,091	\$ 21,821	\$ 22,982	\$ 47,775	\$ 65,777	\$ 6,259
Other Operating Expenses	\$ 49,552	\$ 132,415	\$ 15,334	\$ 111,138	\$ 33,920	\$ 17,437	\$ 3,802	\$ 3,745	\$ 24,103	\$ 119,879	\$ 1,112
Allocated Program Indirect	\$ (313,965)	\$ 144,755	\$ 14,965	\$ 7,667	\$ 5,052	\$ 15,094	\$ 1,999	\$ 1,737	\$ 28,379	\$ 50,174	\$ 3,771
Reclassification	\$ -	\$ (853,272)	\$ 649,039	\$ -	\$ 204,171	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 340
Total Expenditures	\$ 0	\$ 1,299,034	\$ 982,262	\$ 914,994	\$ 424,899	\$ 251,976	\$ 44,773	\$ 41,556	\$ 468,984	\$ 826,566	\$ 62,499
Funding Over/(under) expenditures	\$ 0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
YTD % of Budgeted Funds Expended		99.39%	111.17%	93.68%	99.93%	99.72%	146.63%	102.05%	97.30%	116.13%	0.00%

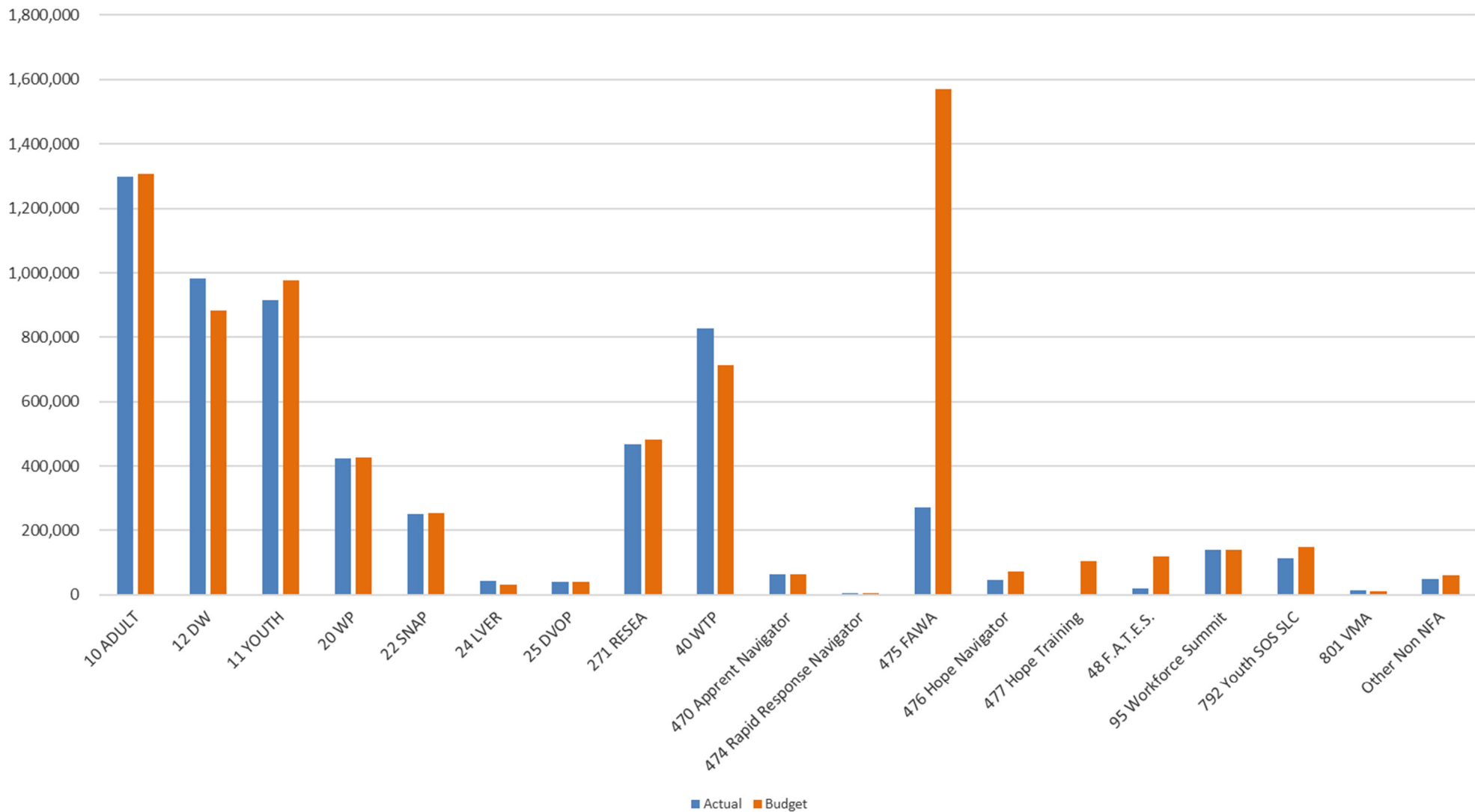
LWDB 20
Summary of Funding and Expenditures
as of June 30, 2024

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	\$ 4,700	\$ -	\$ 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	\$ -	\$ 310,485	\$ -	\$ -	\$ 97,043	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 22-23	\$ -	\$ 1,260,541	\$ -	\$ -	\$ 21,069	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ 4,700	\$ 1,571,026	\$ 73,283	\$ 104,686	\$ 118,112	\$ 140,000	\$ 149,230	\$ 12,024	\$ 60,046
FUNDING DRAWN DOWN YTD									
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	\$ -	\$ 45,277	\$ 1,092	\$ -	\$ 140,000	\$ -	\$ 15,030	\$ -
PY 23-24 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 50,475
Additional Funds	\$ -	\$ -	\$ -	\$ -	\$ 21,069	\$ -	\$ 113,535	\$ -	\$ -
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 24-25	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 22-23	\$ -	\$ 271,728	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ 4,700	\$ 271,728	\$ 45,277	\$ 1,092	\$ 21,069	\$ 140,000	\$ 113,535	\$ 15,030	\$ 50,475
% of Total Budgeted Funding Received	100.00%	17.30%	61.78%	1.04%	17.84%	0.00%	76.08%	125.00%	84.06%
EXPENDITURES									
Administrative	\$ 648	\$ 36,492	\$ 5,957	\$ 144	\$ 2,862	\$ 19,637	\$ 15,662	\$ -	\$ 6,087
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ 648	\$ 36,492	\$ 5,957	\$ 144	\$ 2,862	\$ 19,637	\$ 15,662	\$ -	\$ 6,087
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ 4,052	\$ 235,236	\$ 39,320	\$ 948	\$ 18,207	\$ 120,363	\$ 97,873	\$ 15,030	\$ 42,093
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 3,455	\$ 134,410	\$ 31,063	\$ 711	\$ 3,756	\$ -	\$ 10,113	\$ -	\$ 15,870
Contract Labor	\$ 12	\$ 3,457	\$ 244	\$ 38	\$ 59	\$ -	\$ 7,302	\$ -	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,923	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ 450	\$ -	\$ -	\$ -	\$ -
Support Services ITA	\$ -	\$ -	\$ -	\$ -	\$ 1,017	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ -	\$ -	\$ -	\$ 9,485	\$ -	\$ -	\$ -	\$ 5,000
Training-OJT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,274
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 65,128	\$ -	\$ -
Travel	\$ 4	\$ 1,395	\$ 100	\$ 5	\$ 13	\$ -	\$ 16	\$ -	\$ 1,112
One Stop Shared Costs	\$ 59	\$ 21,450	\$ 3,008	\$ 124	\$ 826	\$ -	\$ 1,845	\$ -	\$ 6,821
Other Operating Expenses	\$ 499	\$ 57,684	\$ 2,156	\$ 5	\$ 1,280	\$ 111,301	\$ 4,319	\$ 15,030	\$ 6,207
Allocated Program Indirect	\$ 299	\$ 16,840	\$ 2,749	\$ 66	\$ 1,321	\$ 9,062	\$ 7,227	\$ -	\$ 2,809
Reclassification	\$ (277)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expenditures	\$ 4,700	\$ 271,728	\$ 45,277	\$ 1,092	\$ 21,069	\$ 140,000	\$ 113,535	\$ 15,030	\$ 48,179
Funding Over/(under) expenditures	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,296
YTD % of Budgeted Funds Expended	100.00%	17.30%	61.78%	1.04%	17.84%	0.00%	76.08%	125.00%	80.24%

LWDB 20
Summary of Funding and Expenditures
as of June 30, 2024

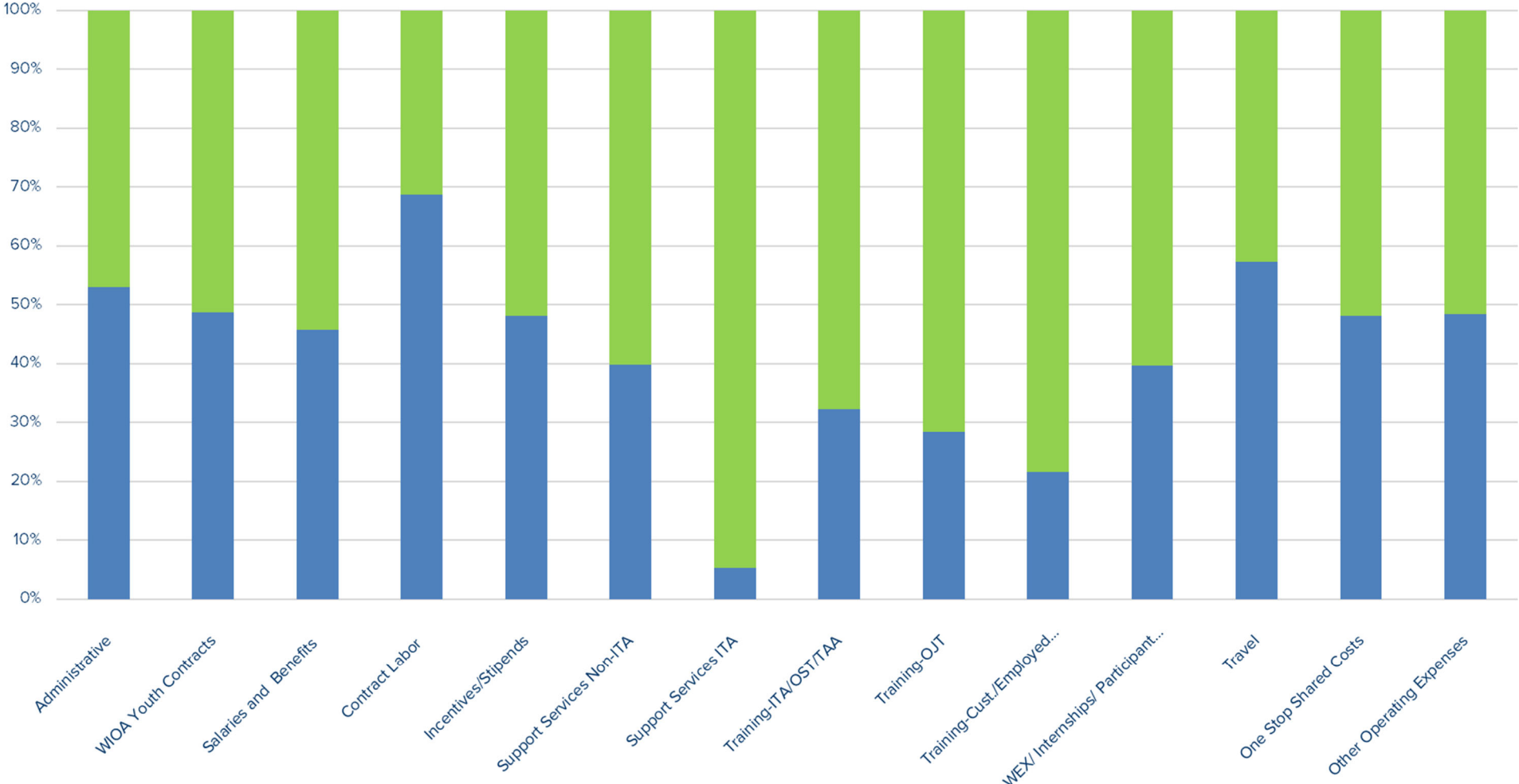
PY 23-24 TOTAL AVAILABLE FUNDING	YEAR TO DATE TOTALS			
PY 23-24 Allocations		\$	5,702,677	
PY 23-24 Supplemental		\$	164,384	
Unrestricted Funds Earned this year		\$	60,046	
Additional Funds		\$	149,230	
Retained by DEO for Merit Salaries		\$	(523,974)	
Carryforward to PY 24-25		\$	(1,595,698)	
Carryforward from PY 22-23		\$	3,449,238	
TOTAL		\$	7,405,904	
FUNDING DRAWN DOWN YTD				
	PY 23-24 Actual	PY 23-24 Budget	VARIANCE	% Expended
PY 23-24 Allocations	\$ 3,359,315	\$ 5,702,677	\$ 2,343,363	58.908%
PY 23-24 Supplemental	\$ -	\$ 164,384	\$ 164,384	0.000%
Unrestricted Funds Earned this year	\$ 50,475	\$ 60,046	\$ 9,571	84.061%
Additional Funds	\$ 134,604	\$ 149,230	\$ 14,626	90.199%
Retained by DEO for Merit Salaries	\$ -	\$ (523,974)	\$ (523,974)	
Carryforward to PY 24-25	\$ -	\$ (1,595,698)	\$ (1,595,698)	
Carryforward from PY 22-23	\$ 2,436,054	\$ 3,449,238	\$ 1,013,185	70.626%
TOTAL	\$ 5,980,448	\$ 7,405,904	\$ 1,425,455	80.752%
% of Total Budgeted Funding Received	80.75%			
EXPENDITURES				
	PY 23-24 Actual	PY 23-24 Budget	VARIANCE	% Expended
Administrative	\$ 680,357	\$ 603,203	\$ (77,155)	112.79%
Salaries and Benefits	\$ 475,944	\$ 515,350	\$ 39,407	92.35%
General and Administrative	\$ 204,414	\$ 86,486	\$ (117,928)	236.35%
Allocated Indirect Costs	\$ (0)	\$ 1,366	\$ 1,366	
Reclassification	\$ (0)	\$ -	\$ (0)	
Travel	\$ -	\$ -	\$ -	
Program Training	\$ 5,297,794	\$ 6,795,476	\$ 1,497,682	78.0%
WIOA Youth Contracts	\$ 756,710	\$ 800,000	\$ 43,290	94.6%
Salaries and Benefits	\$ 2,536,434	\$ 3,012,056	\$ 475,622	84.2%
Contract Labor	\$ 152,744	\$ 69,550	\$ (83,194)	219.6%
Internship	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ 5,673	\$ 6,126	\$ 453	92.6%
Support Services Non-ITA	\$ 3,146	\$ 4,759	\$ 1,613	66.1%
Support Services ITA	\$ 8,665	\$ 156,500	\$ 147,835	5.5%
Training-ITA/OST/TAA	\$ 313,615	\$ 658,515	\$ 344,899	47.6%
Training-OJT	\$ 266,300	\$ 670,424	\$ 404,123	39.7%
Training-Cust./Employed Worker	\$ 21,371	\$ 78,000	\$ 56,629	27.4%
WEX/ Internships/ Participant Wages	\$ 65,128	\$ 99,226	\$ 34,098	65.6%
Travel	\$ 34,635	\$ 25,891	\$ (8,744)	133.8%
One Stop Shared Costs	\$ 422,455	\$ 456,990	\$ 34,535	92.4%
Other Operating Expenses	\$ 710,918	\$ 757,440	\$ 46,522	93.9%
Allocated Program Indirect	\$ (0)	\$ 0	\$ -	
Reclassification	\$ 0	\$ -	\$ 0	
Total Expenditures	\$ 5,978,152	\$ 7,398,679	\$ 1,420,527	80.8%
Funding Over/(under) expenditures	\$ 2,296			
YTD % of Budgeted Funds Expended	80.72%			

Budget vs Actual by Program



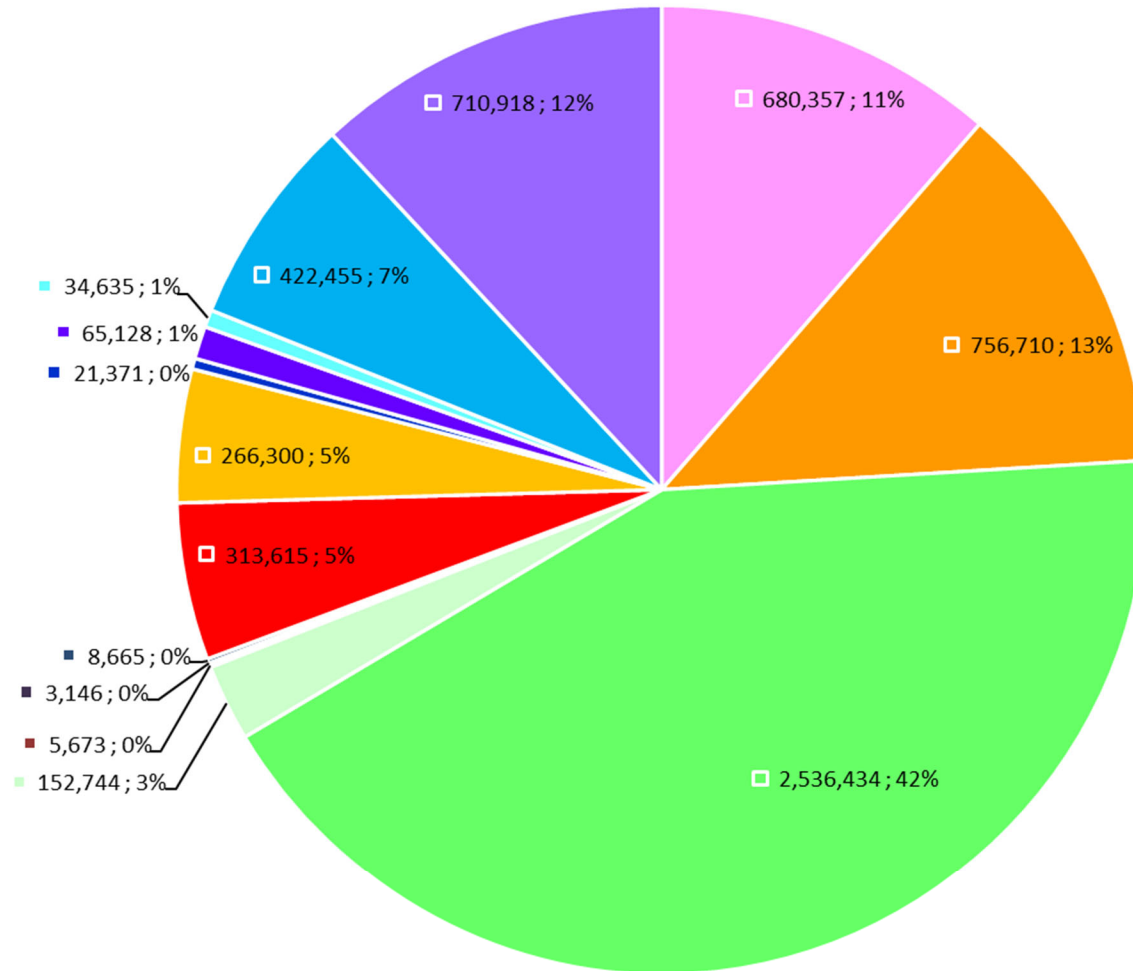
Budget to Actual by Expenditure Category as of June 30, 2024

■ PY 23-24 Actual ■ PY 23-24 Budget



PY 23-24 Expenditures Actual

- Administrative
- WIOA Youth Contracts
- Salaries and Benefits
- Contract Labor
- Incentives/Stipends
- Support Services Non-ITA
- Support Services ITA
- Training-ITA/OST/TAA
- Training-OJT
- Training-Cust./Employed Worker
- WEX/ Internships/ Participant Wages
- Travel
- One Stop Shared Costs
- Other Operating Expenses





Agenda Item 6d Programs and Services Meeting Minutes

August 28, 2024

Opening Remarks

1. Welcome & Attendance

Voting Items

2. Review and Approve Wagner Peyser (WP) - Job Seeker Registration Application and Services Policy Revisions
3. Review and Approve Wagner Peyser (WP) - Job Orders and Placement Policy Revisions
4. Review and Approve Welfare Transition (WT) Program - Supportive Services Policy Revisions
5. Review and Approve Workforce Innovation Opportunity Act (WIOA) - Adult/Dislocated Worker (DW) Supportive Services Policy Revisions
6. Review and Approve Workforce Innovation Opportunity Act (WIOA) - Eligible Training Provider List Policy Revisions
7. Review and Approve Workforce Innovation Opportunity Act (WIOA) - Adult/DW Program Eligibility Policy Revisions
8. Review and Approve Workforce Innovation Opportunity Act (WIOA) - Youth Services Subrecipient Contract Renewal - PY2024-2025
9. Review and Approve Local Targeted Occupations List (LTOL) - 2nd Quarter PY 2024-2025

Information/Discussion

10. Primary Indicators of Performance 4th Quarter - PY 2023-2024 (Tentative)
11. WIOA Local Four-Year/Regional Plan Update
12. Hope Florida Program Update
13. Welfare Transition/Temporary Assistance for Needy Families (TANF) Summer Program Update
14. CareerSource Research Coast (CSRC) Program Updates
 - a. Wagner-Peyser (WP)/ Reemployment Services and Eligibility Assessment (RESEA)
 - Mary Bell
 - WP/RESEA Program Changes
 - Staffing Update

- b. Workforce Innovation and Opportunity Act (WIOA) - Kate Sayger/Joan Daley
 - Individual Training Account (ITA)/Supportive Services Expenditures -PY 2023-2024
 - Individual Training Account (ITA)/Supportive Services Expenditures - July 2024
 - Staff Training Updates - Career Planner I
 - c. Welfare Transition (WT)/SNAP - Jodi Thomas
 - House Bill 1267 Updates - Implemented 7/1/2024
 - Staffing Updates
 - d. Jobs for Veterans State Grant (JVSG) - Shelly Batton
 - Staffing Changes
 - Paychecks for Patriots Job Fair
 - Veterans Program Letter 05-24
15. Adjournment - Next P & S Meeting – November 20, 2024

Members Participating by Teleconference

Wayne Olson

Members Present

Bob Cenk

Members Excused

Pete Tesch Jose Capellan Prasanth Pilly

Members Unexcused

None

Staff Present

Shelly Batton	Christina Coble	Mary Bell
Kate Sayger	Joan Daley	Jodi Thomas
Martin Rivera	Jennifer Eimann	

Call to Order

Bob Cenk, Chair, called the meeting to order at 8:05 a.m. A quorum was not established. Mr. Cenk agreed to move the voting items to the next Executive Committee meeting, which will be held on September 13, 2024, for review and approval.

All members agreed that meeting items 10-14 will only be for information and discussion.

Agenda Item 10 - Primary Indicators of Performance 4th Quarter - PY 2023-2024 (Tentative):

Shelly Batton, Director of Programs, explained that the Primary Indicators of Performance for the 4th quarter of PY 2023-2024 has not yet been published by the Department of Commerce (FLORIDACOMMERCE) website. As a result, Ms. Batton explained that the committee would move to Agenda Item 10 for discussion.

Agenda Item 11 – WIOA Local Four-Year/Regional Plan Update:

Shelly Batton, Director of Programs, explained that staff completed their assigned sections of the WIOA Local Four-Year Plan. Tracey McMorris, COO, is reviewing the entire plan and making any final revisions before posting it on the CareerSource Research Coast CSRC website for 30 days and presenting it to the Board of Directors at the September 25, 2024 meeting.

CSRC has completed the initial planning sessions with CareerSource Palm Beach (CSPB) County and identified areas for improving workforce system alignments. This information is being incorporated into the four-year plan.

Ms. Batton noted that CSRC and CSPB are meeting on August 29, 2024, to discuss how to collaboratively implement the identified partnership opportunities to better achieve our shared goals. Ms. Batton stressed that collaborating with CSPB was a very positive experience.

Agenda Item 12 - Hope Florida Program Update:

Shelly Batton, Director of Programs, stated that Mayra Hernandez had been hired as the new full-time Hope Florida Navigator. Ms. Hernandez has been working closely with Tracey McMorris, COO, and receiving training on the program's requirements.

Ms. Batton explained that the Department of Child and Family Services (DCF) originally used Smartsheet as their referral system software. However, DCF has decided to transition to a case management platform called Unite Us. The LWDBs are now using this system for all client referrals. Staff training on the platform has been completed.

As of August 21st CSRC received 107 referrals through Smartsheet and 4 through Unite Us. Ms. Hernandez, in her new position as Hope Navigator, will follow up on all referrals from DCF, assisting them in becoming job-ready and leading to sufficient employment.

Agenda Item 13 - Welfare Transition/Temporary Assistance for Needy Families (TANF) Summer Program Update:

Shelly Batton, Director of Programs, provided background information on the TANF Summer Youth Program. Money is allotted for this program each summer using Welfare Transition funding. The TANF program will fund a summer youth program focusing on reducing teen pregnancy in partnership with the Boys & Girls Clubs of St. Lucie County (BGCSLC) and E.N.D. It! (Everybody's Not Doing It!).

This funding paid for 29 eligible youth from BGCSLC and 35 eligible youth from E.N.D. It! to attend summer camp. This eight-week program ended in July 2024. Ms. Batton stated it was a success, and all parties look forward to participating next year.

Agenda Item 14 - CareerSource Research Coast (CSRC) Program Updates:

Mary Bell, Wagner-Peyser Program Manager, shared updates on Reemployment Services and Eligibility Assessment (RESEA) and the Migrant Seasonal Farmworker Programs:

- Reemployment Services and Eligibility Assessment (RESEA) Program: Ms. Bell explained that the Reemployment Assistance Program allows clients to engage with their Career Center staff and have targeted services provided to them. Initially, staff were required to provide an orientation of our services and an initial assessment to determine the individual skills, work history, and barriers in order to complete a detailed career plan with the client.

As of April 2024, the state no longer requires the initial assessment. Therefore, we are providing an online objective assessment within the Employ Florida site in its place.

The Department of Commerce had previously stated that individuals must attend their mandatory initial appointment as a requirement of the RESEA program. If they do not, they will be disqualified from receiving their benefits for the week of the missed appointment.

Ms. Bell shared that this information was incorrect and that clients who missed their appointments were indefinitely disqualified from receiving their benefits until they could reschedule and attend their appointments.

These clients have been notified of the issue and are given priority when contacting the RESEA Program Specialists for new appointments.

- Migrant Seasonal Farmworker (MSFW): Ms. Bell explained that Hector Ramirez, MSFW Specialist, who initially reported to Shelly Batton, will now report to Ms. Bell as of August 1, 2024.

Kate Sayger, Program Coordinator, gave updates on the WIOA Adult/Dislocated Worker Programs.

- Individual Training Account (ITA) Expenditures: As of June 30, 2024, Career Planners had exceeded their goal of \$263,800 in ITA expenditures and spent \$323,313 in training dollars.
- Staff Updates: Ms. Sayger stated that we now have three Career Planners, down from four. The Career Planners are located in Ft. Pierce, Stuart, and Vero Beach career centers.

Jodi Thomas, Program Coordinator, shared updates on Welfare Transition (WT) and the Supplemental Nutrition Assistance Program (SNAP).

- Welfare Transition (WT) Program House Bill 1267: House Bill 1267 was implemented on July 1, 2024, amending the state plan for the Welfare Transition program to include entrance and exit surveys for all welfare transition participants.

In addition, the Florida CLIFF Dashboard will be implemented to provide information that will assist individuals in understanding their potential earnings through paid employment while also mapping the timing and magnitude of the loss of public assistance as individuals progress along various career pathways.

Working in tandem with the CLIFF Dashboard, the Budget Wizard application will walk clients through the four areas (income, savings, fixed expenses, and variable expenses) needed to establish a budget. Once all applicable information has been entered, the Budget Wizard creates a report for the client, which can be reviewed and analyzed.

- Staff Updates: Natalie Roman was hired on July 8th as a WT/SNAP Career Planner. Ms. Roman has completed her Welfare Transition training and is currently training in the SNAP program. Ms. Roman is scheduled to take her Tier I test on August 28, 2024.

Shelly Batton, Director of Programs, shared updates on the Jobs for Veterans State Grant (JVSG):

- JVSG - Staffing: Ms. Batton stated that the JVSG program is fully staffed. The supervision of current staff has changed as of July 1. Ms. Batton still oversees the JVSG program. However, the direct supervision of the Disabled Veteran Outreach Program Specialists (DVOPS) will be the applicable center managers, and Christina Coble will now oversee the Local Employment Veterans Representatives (LVERS). As Ms. Coble is the Business Services Manager, it made sense to put all employment specialists under the same umbrella.
- Annual Paychecks for Patriots Job Fair: This event will be held on November 14, 2024, at the Riverwalk Center in Ft. Pierce. More information will follow.
- Veterans Program Letter (VPL) 5-24: Ms. Batton explained that new federal guidance has been shared that addresses eligibility and the roles and responsibilities of the JVSG staff. This guidance expands the eligibility criteria for qualified veterans that DVOPs can serve.

As a result, to align with the new criteria, the LWDB will need to change the language of our policies and procedures and update the processes by which we serve eligible veterans. Staff have been trained on the new updates.

Agenda Item 15 - Adjournment:

With no further items to discuss, Bob Cenk moved to adjourn the meeting, seconded by Wayne Olson. All members agreed, and the meeting was adjourned at 8:43 a.m.

The next Programs and Services Committee Meeting will be on November 20, 2024

BOARD STAFF CERTIFICATION

I hereby certify these minutes reflect the proceedings by the Program and Services Committee of CareerSource Research Coast, have been reviewed by the Board of Directors, and approved or approved with modifications which have been incorporated herein.

Shelly Batton
Board Staff

Date



Agenda Item 6e

Executive Committee

Meeting Minutes

September 13, 2024

Opening Remarks

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

Voting Items

3. Review and Approve July Financial Reports - PY2024-2025
4. Review and Approve Wagner Peyser (WP) - Job Seeker Registration Application and Services Policy Revisions
5. Review and Approve Wagner Peyser (WP) - Job Orders and Placement Policy Revisions
6. Review and Approve Welfare Transition (WT) Program - Supportive Services Policy Revisions
7. Review and Approve Workforce Innovation Opportunity Act (WIOA) - Adult/Dislocated Worker (DW) Supportive Services Policy Revisions
8. Review and Approve Workforce Innovation Opportunity Act (WIOA) - Eligible Training Provider List Policy Revisions
9. Review and Approve Workforce Innovation Opportunity Act (WIOA) - Adult/DW Program Eligibility Policy Revisions
10. Review and Approve Workforce Innovation Opportunity Act (WIOA) - Youth Services Subrecipient Contract Renewal - PY2024-2025
11. Review and Approve Local Targeted Occupations List (LTOL) - 2nd Quarter PY 2024-2025
12. Review and Approve Acceptance of the Florida Department of Commerce (FLORIDACOMMERCE) Grantee/Subgrantee Agreement - PY 2024-2027

Information/Discussion

13. CareerSource Research Coast Final Budget - PY 2024-2025
14. Florida Department of Commerce (FLORIDACOMMERCE) Internal Control Questionnaire (ICQ) and Assessment - PY 2024-2025
15. Updates:
 - WIOA Four-Year Plan
 - Workforce Professional Development Summit - September 8-11, 2024
 - Board Member Orientation/Refresher
16. Adjournment

Members Participating In-Person

Bob Cenk

Members Participating by Teleconference:

Terrance Moore Werner Bols Jim Brann
William Armstead

Members Excused

Leslie Kristof

Administrative Staff Present/Teleconference:

Brian Bauer Tracey McMorris Lisa Delligatti
Jennifer Eimann

Call to Order:

Jim Brann, Chair, called the meeting to order at 8:05 am. A quorum was established.

Agenda Item 2 - Declarations of Conflicts of Interest (COI):

Jim Brann, Chair, asked if there were any Conflicts of Interest, and none were declared.

Agenda Item 3 - Review and Approve Financial Reports - PY2024-2025:

Lisa Delligatti, CFO, stated that July 2024 had less activity than prior months due to the final approval of expenditures in June for PY 23-24. which happens in June.

Ms. Delligatti noted that \$8,026 was the last Adult money carryforward from 2023. Currently, LWDB 20 is utilizing Dislocated Worker (DW) funding for all our adult expenditures until we fully expend the DW 2023 grant; at this point, we'll use Adult 2024.

Werner Bols made a motion to approve the Financial Reports for PY 2024-2025, as presented. Bob Cenk seconded the motion. The motion passed unanimously.

Agenda Item 4 - Review and Approve Wagner Peyser (WP) - Job Seeker Registration Application and Services Policy Revisions:

Tracey McMorris, COO, stated that at the beginning of the program year, staff reviews all of the local policies and procedures, comparing them to the CareerSource Florida Administrative Policies to ensure that they align.

The following WP - Job Seeker Registration Application and Services Policy Revisions had some language changes to clarify the definition of a full registration vs. a partial registration in EmployFlorida and further guidance on how a client can register.

Terrance Moore made a motion to approve the acceptance of the Wagner Peyser (WP) - Job Seeker Registration Application and Services Policy Revisions, as presented. Will Armstead seconded the motion. The motion passed unanimously.

Agenda Item 5 - Review and Approve Wagner Peyser (WP) - Job Orders and Placement Policy Revisions:

Tracey McMorris, COO, stated that this policy's language changed regarding properly recording job referrals, job developments, hires, and obtained employment.

The language was changed to clarify the expectations further, but nothing materially changed in how we operate.

Terrance Moore made a motion to approve the acceptance of the Wagner Peyser (WP) - Job Order and Placement Policy Revisions, as presented. Will Armstead seconded the motion. The motion passed unanimously.

Agenda Item 6 - Review and Approve Welfare Transition (WT) Program - Supportive Services Policy Revisions:

Tracey McMorris, COO, stated that the one significant change is the addition of supportive services we can invest in for welfare transition participants. These include training activities, tools, books, exams, physicals that might be required for their employment, and background checks.

This change is a concerted effort to further support and guide these individuals toward employment. While many other supportive services are about transportation and childcare, which is allowable, we want to ensure that we have the structure to support these participants and guide them toward employment.

Will Armstead made a motion to approve the acceptance of the Welfare Transition (WT) – Supportive Services Policy Revisions, as presented. Bob Cenk seconded the motion. The motion passed unanimously.

Agenda Item 7 - Review and Approve Workforce Innovation Opportunity Act (WIOA) - Adult/Dislocated Worker (DW) Supportive Services Policy Revisions:

Tracey McMorris, COO, stated that the policy revisions were incorrect and should not have been presented to the committee.

Werner Bols made a motion to approve the withdrawal of the Workforce Innovation Opportunity Act (WIOA) - Adult/Dislocated Worker (DW) Supportive Services Policy Revisions from the agenda. Terrance Moore seconded the motion. The motion passed unanimously.

Agenda Item 8 - Review and Approve Workforce Innovation Opportunity Act (WIOA) - Eligible Training Provider List Policy Revisions:

Tracey McMorris, COO, stated that this policy is a complete overhaul of the previous policy and greatly changes how we approach managing our eligible training provider list. The major change in this policy is that the state is now taking the lead in approving all eligible training providers. In contrast, each local workforce development board had previously approved their training providers.

CareerSource Florida released its eligible training provider policy in August, so the revisions we've made are aligned with that administrative policy. Eligible training providers now apply at the state level to employ Florida. Our local board staff does have a part in guiding the training provider through the application process, ensuring that all the applications are complete. Still, Florida Commerce has the final approval.

Once an eligible training provider is approved at the state level, every board in the state has access to it. This process opens opportunities for our clients and allows us to connect them to even more training opportunities. So, we are kind of excited about this change and the diversity of training that it's going to bring.

Bob Cenk made a motion to approve the Workforce Innovation Opportunity Act (WIOA) - Eligible Training Provider List Policy Revisions, as presented. Werner Bols seconded the motion. The motion passed unanimously.

Agenda Item 9 - Review and Approve Workforce Innovation Opportunity Act (WIOA) - Adult/DW Program Eligibility Policy Revisions:

Tracey McMorris, COO, explained that the revisions to this policy were made to better align the language with the CareerSource Florida Administrative Policy.

One change clarifies how income is assessed based on someone's current financial situation and the number of people living in the household. This policy outlines guidance on calculating income and what documents are appropriate.

Werner Bols made a motion to approve the Workforce Innovation Opportunity Act (WIOA) - Adult/DW Program Eligibility Policy Revisions, as presented. Bob Cenk seconded the motion. The motion passed unanimously.

Agenda Item 10 - Review and Approve Workforce Innovation Opportunity Act (WIOA) - Youth Services Subrecipient Contract Renewal - PY2024-2025:

Agenda Item 4 - Review and Approve WIOA Youth - Services Subrecipient Contract for PY 2023-2024:

Brian Bauer, President/CEO, explained that CareerSource Research Coast (CSRC) is working with Eckerd Youth to renew the contract for PY 2023-2024 (4 of 5 years from the RFP term). Based on performance and fiscal integrity, a letter of intent has been executed to renew the WIOA Youth Services contract with Eckerd Connects for PY 2024-2025.

Mr. Bauer explained that CSRC and Eckerd had reviewed the Statement of Work and discussed changes for the upcoming PY 2024-2025. Mr. Bauer stated that the contract awards Eckerd Youth \$800,000 for PY 2024-2025.

Bob Cenk made a motion to approve the WIOA Youth Services Subrecipient Contract for PY2024-2025, as presented. Terrance Moore seconded the motion. The motion passed unanimously.

Agenda Item 11 - Review and Approve Local Targeted Occupations List (LTOL) for the 2nd Quarter of PY 2024-2025:

Brian Bauer, President/CEO, explained that the Statewide Demand Occupations list identifies the labor market needs of Florida's business community and encourages job training based on those needs, with emphasis on jobs that are both high demand and high skill/high wage and is used as a baseline for establishing the Local Targeted Occupations Lists (LTOLs).

The Local Workforce Development Boards (LWDBs) develop and use their LTOLs to identify occupations for which eligible adults and dislocated workers may receive training assistance under the Workforce Innovation and Opportunity Act.

Staff reviewed local labor market information and resources regarding the LTOL. There is no recommended addition of occupations to the 2nd Quarter of the PY 2024-2025 list. Staff recommends approval of this LTOL for the 2nd Quarter of PY 2024-2025.

Terrance Moore made a motion to approve the Local Targeted Occupations List for the 2nd Quarter of PY 2024-2025, as presented. Will Armstead seconded the motion. The motion passed unanimously.

Agenda Item 12 - Review and Approve Acceptance of the Florida Department of Commerce (FLORIDACOMMERCE) Grantee/Subgrantee Agreement - PY 2024-2027:

Brian Bauer, President/CEO, explained that the LWDBs have a contract with Florida Commerce called the grantee-subgrantee agreement. This agreement defines the LWDBs' fiscal, programmatic, monitoring, and auditing roles and responsibilities. The boards are required to renew the agreement every three years.

A motion was made by Werner Bols to approve the Acceptance of the Florida Department of Commerce (FLORIDACOMMERCE) Grantee/Subgrantee Agreement - PY 2024-2027, as presented. Terrance Moore seconded the motion. The motion passed unanimously.

Agenda Item 13 - CareerSource Research Coast Final Budget - PY 2024-2025:

Lisa Delligatti, CFO, presented the funding allocations for PY 2024-2025. Ms. Delligatti explained that each year, the Board approves a budget for the following program year.

Board Staff has received final allocations for the WIOA, Wagner Peyser, and Welfare Transition programs for PY 2024-2025. Based on this information, the finance department met with Executive Management staff and drafted a final budget to present to the Board of Directors. The Board will be able to approve the 2024-2025 final budget at the September 25, 2024 meeting.

Agenda Item 14 - Florida Department of Commerce (FLORIDACOMMERCE) Internal Control Questionnaire (ICQ) and Assessment - PY 2024-2025:

Brian Bauer, President/CEO, explained that FLORIDACOMMERCE has developed the Internal Control Questionnaire (ICQ) as a self-assessment tool for the agency's sub-recipients to help evaluate whether an organization has a sound internal control system.

The LWDBs must submit the ICQ to FLORIDACOMMERCE each year, which demonstrates their commitment to integrity and ethical values. The organization's President/CEO submits the ICQ to FLORIDACOMMERCE. Responses should reflect the entity's management team's knowledge and perspective of the controls in place as of the time the questionnaire is completed.

Mr. Bauer stated that once the ICQ is completed, it will be presented to the Board of Directors for approval at the September 25 meeting.

Agenda Item 14 - Updates:

- Workforce Professional Development (WPD) Summit - This year's summit was held at the Renaissance Orlando at SeaWorld from September 9 to 11, 2024. CSRC sent twelve staff members.
- Board Member Orientation/Refresher - Mr. Bauer explained that Taylor, Hall, Miller, and Parker (THMP) updated the LWDBs orientation. The orientation video is expected to be sent to Board members on September 25, 2024, and should be completed by June 30, 2025.
- CareerSource Research Coast Reorganization—PY 2024-2025: Mr. Bauer announced that due to an approximately 18% funding reduction, LWDB 20 will be consolidated into one comprehensive center. We will close the Indian River Career and Martin County Career Centers effective October 2024. Likewise, the current administrative offices will also be closed. Mr. Bauer is working to finalize a new lease at Renaissance Business Park, Ft. Pierce, to house the one-stop comprehensive center.

Mr. Bauer explained that an all-staff meeting was called on September 8, 2024, and these changes and a reduction in the workforce (RIF) were announced. The RIF includes at least six staff members and will occur on 9/30/2024.

Business will continue as usual, and all services will remain available to clients. Additional information will be provided to the board as we move forward.

Agenda 11 – Adjournment:

With no further items to discuss, a motion was made by Jim Brann, Chair, to adjourn the meeting, seconded by Werner Bols. The motion passed unanimously, and the meeting was adjourned at 9:04 a.m.

BOARD SECRETARY CERTIFICATION

I hereby certify that these minutes reflect the proceedings by the Executive Committee of CareerSource Research Coast, which have been reviewed by the Board of Directors and approved or approved with modifications incorporated herein.

Brian Bauer
Secretary

Date

Next Executive Meeting - October 11, 2024

AGENDA ITEM SUMMARY

Title	Review and Approve Financial Reports
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's
Action Requested	Review and Approve July Financial Reports - PY 2024-2025
Background	The Board approved the budget for PY 2024-2025. The Executive Committee regularly reviews budgets, all amendments to the budget, and monthly expenditures.
Staff Recommendations	Review and Approve July Financial Reports
Supporting Material	Monthly Financial Report, Balance Sheet
Board Staff	Lisa Delligatti Chief Financial Officer ldelligatti@careersourcerc.com (866) 482-4473 ext. 430

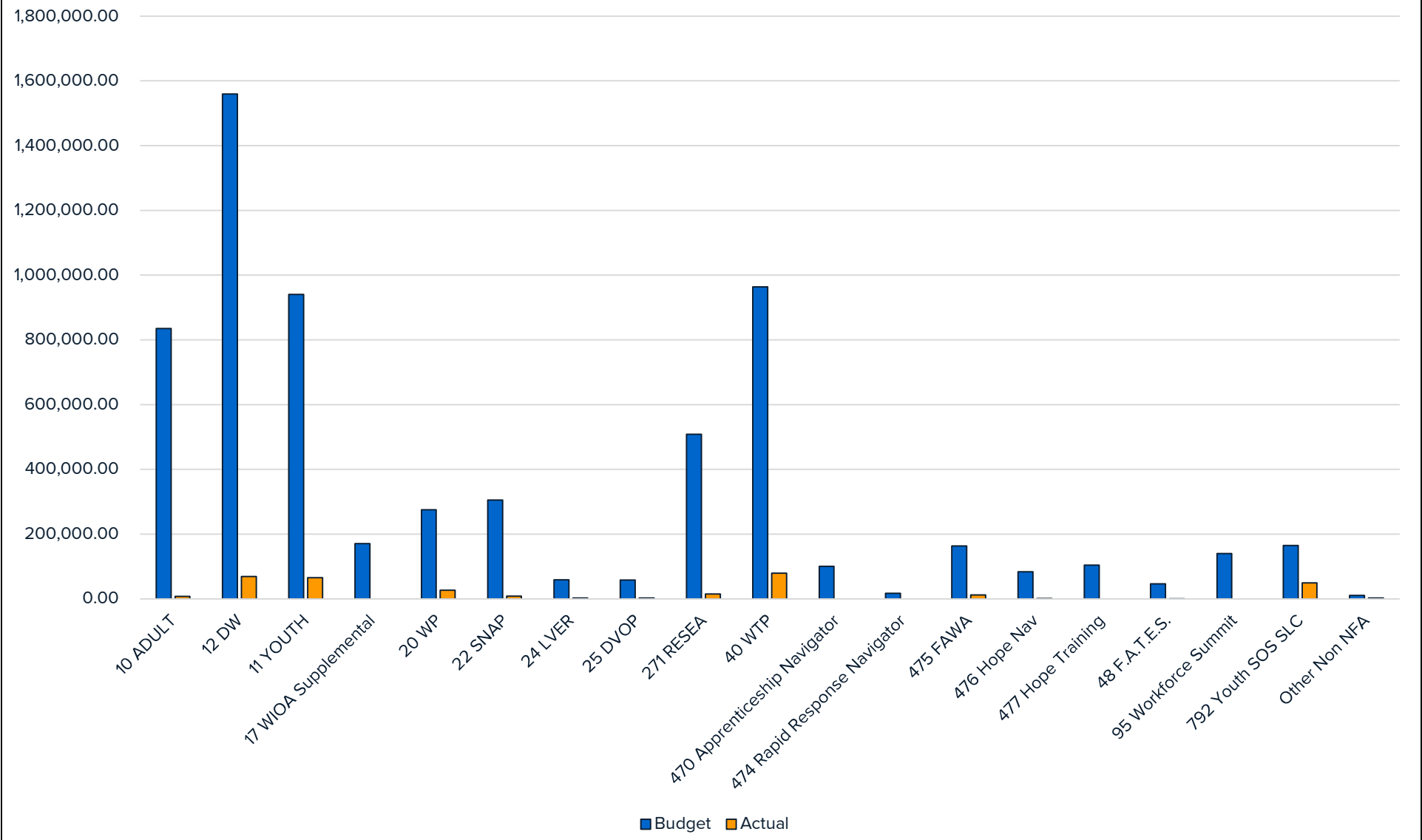
LWDB 20
Summary of Funding and Expenditures
as of July 31, 2024

PY 24-25 TOTAL AVAILABLE FUNDING	INDIRECT	10 ADULT	12 DW	11 YOUTH	17 WIOA Supplemental	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	40 WTP	470 Apprenticeship Navigator	474 Rapid Response Navigator
PY 24-25 Allocations		\$ 826,927	\$ 747,469	\$ 684,294	\$ 170,532	\$ 794,094	\$ 277,746	\$ 126,167	\$ 166,108	\$ 453,000	\$ 963,229	\$ 100,580	\$ 75,000
PY 24-25 Supplemental		\$ -	\$ 164,384	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ (341,143)	\$ -	\$ (78,699)	\$ (91,213)	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 25-26		\$ -	\$ (152,781)	\$ (338,886)	\$ -	\$ (278,558)	\$ (49,075)	\$ (8,699)	\$ (41,090)	\$ (66,778)	\$ (265,088)	\$ -	\$ (57,789)
Carryforward from PY 23-24		\$ 8,026	\$ 800,000	\$ 595,000	\$ -	\$ 101,125	\$ 76,500	\$ 20,463	\$ 24,529	\$ 122,540	\$ 265,803	\$ -	\$ -
Total DEO Grant Funding		\$ 834,953	\$ 1,559,072	\$ 940,408	\$ 170,532	\$ 275,518	\$ 305,171	\$ 59,232	\$ 58,334	\$ 508,762	\$ 963,944	\$ 100,580	\$ 17,211
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ -	\$ 834,953	\$ 1,559,072	\$ 940,408	\$ 170,532	\$ 275,518	\$ 305,171	\$ 59,232	\$ 58,334	\$ 508,762	\$ 963,944	\$ 100,580	\$ 17,211
FUNDING DRAWN DOWN YTD													
FUNDING DRAWN DOWN YTD	INDIRECT	10 ADULT	12 DW	11 YOUTH	17 WIOA Supplemental	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	40 WTP	470 Apprenticeship Navigator	474 Rapid Response Navigator
PY 24-25 Allocations		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
PY 24-25 Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 25-26		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 23-24		\$ 8,026	\$ 159,106	\$ 93,317	\$ -	\$ 74,642	\$ 10,501	\$ 2,774	\$ 3,291	\$ 35,228	\$ 54,045	\$ -	\$ -
Total DEO Grant Funding		\$ 8,026	\$ 159,106	\$ 93,317	\$ -	\$ 74,642	\$ 10,501	\$ 2,774	\$ 3,291	\$ 35,228	\$ 54,045	\$ -	\$ -
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL		\$ 8,026	\$ 159,106	\$ 93,317	\$ -	\$ 74,642	\$ 10,501	\$ 2,774	\$ 3,291	\$ 35,228	\$ 54,045	\$ -	\$ -
% of Total Budgeted Funding Received		0.96%	10.21%	9.92%	0.00%	27.09%	3.44%	4.68%	5.64%	6.92%	5.61%	0.00%	0.00%
EXPENDITURES													
Administrative	\$ -	\$ -	\$ 3,866	\$ 3,517	\$ -	\$ 5,329	\$ 798	\$ 136	\$ 137	\$ 1,258	\$ 7,330	\$ -	\$ -
Salaries and Benefits	\$ 15,450	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 13,329	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (28,779)	\$ 8,661	\$ 205	\$ 3,517	\$ -	\$ 329	\$ 798	\$ 136	\$ 137	\$ 1,258	\$ 7,330	\$ -	\$ -
Reclassification	\$ -	\$ (8,661)	\$ 3,661	\$ -	\$ -	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ 0	\$ 8,026	\$ 65,449	\$ 62,235	\$ -	\$ 21,425	\$ 7,911	\$ 2,333	\$ 2,902	\$ 13,652	\$ 71,955	\$ -	\$ -
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 50,620	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 8,885	\$ 32,874	\$ 1,042	\$ 963	\$ -	\$ 710	\$ 2,687	\$ 89	\$ 133	\$ 7,843	\$ 18,481	\$ -	\$ -
Contract Labor	\$ -	\$ 3,433	\$ 113	\$ -	\$ -	\$ 13	\$ 414	\$ 5	\$ 8	\$ 979	\$ 7,909	\$ -	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 200	\$ -	\$ -
Support Services ITA	\$ -	\$ 555	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ 27,622	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-OJT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 314	\$ -	\$ -	\$ -	\$ -	\$ -
One Stop Shared Costs	\$ -	\$ 11,526	\$ 377	\$ -	\$ -	\$ 3,309	\$ 1,005	\$ 1,650	\$ 2,475	\$ 3,285	\$ 8,149	\$ -	\$ -
Other Operating Expenses	\$ 3,884	\$ 6,502	\$ 497	\$ 9,092	\$ -	\$ 2,248	\$ 3,450	\$ 215	\$ 225	\$ 987	\$ 33,963	\$ -	\$ -
Allocated Program Indirect	\$ (12,769)	\$ 3,843	\$ 91	\$ 1,560	\$ -	\$ 146	\$ 354	\$ 60	\$ 61	\$ 558	\$ 3,252	\$ -	\$ -
Reclassification	\$ -	\$ (78,329)	\$ 63,329	\$ -	\$ -	\$ 15,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expenditures	\$ 0	\$ 8,026	\$ 69,315	\$ 65,752	\$ -	\$ 26,754	\$ 8,708	\$ 2,469	\$ 3,038	\$ 14,909	\$ 79,285	\$ -	\$ -
Funding Over/(under) expenditures	\$ 0	\$ (0)	\$ 89,792	\$ 27,566	\$ -	\$ 47,888	\$ 1,793	\$ 305	\$ 253	\$ 20,319	\$ (25,240)	\$ -	\$ -
YTD % of Budgeted Funds Expended		0.96%	4.45%	6.99%	0.00%	9.71%	2.85%	4.17%	5.21%	2.93%	8.23%	0.00%	0.00%

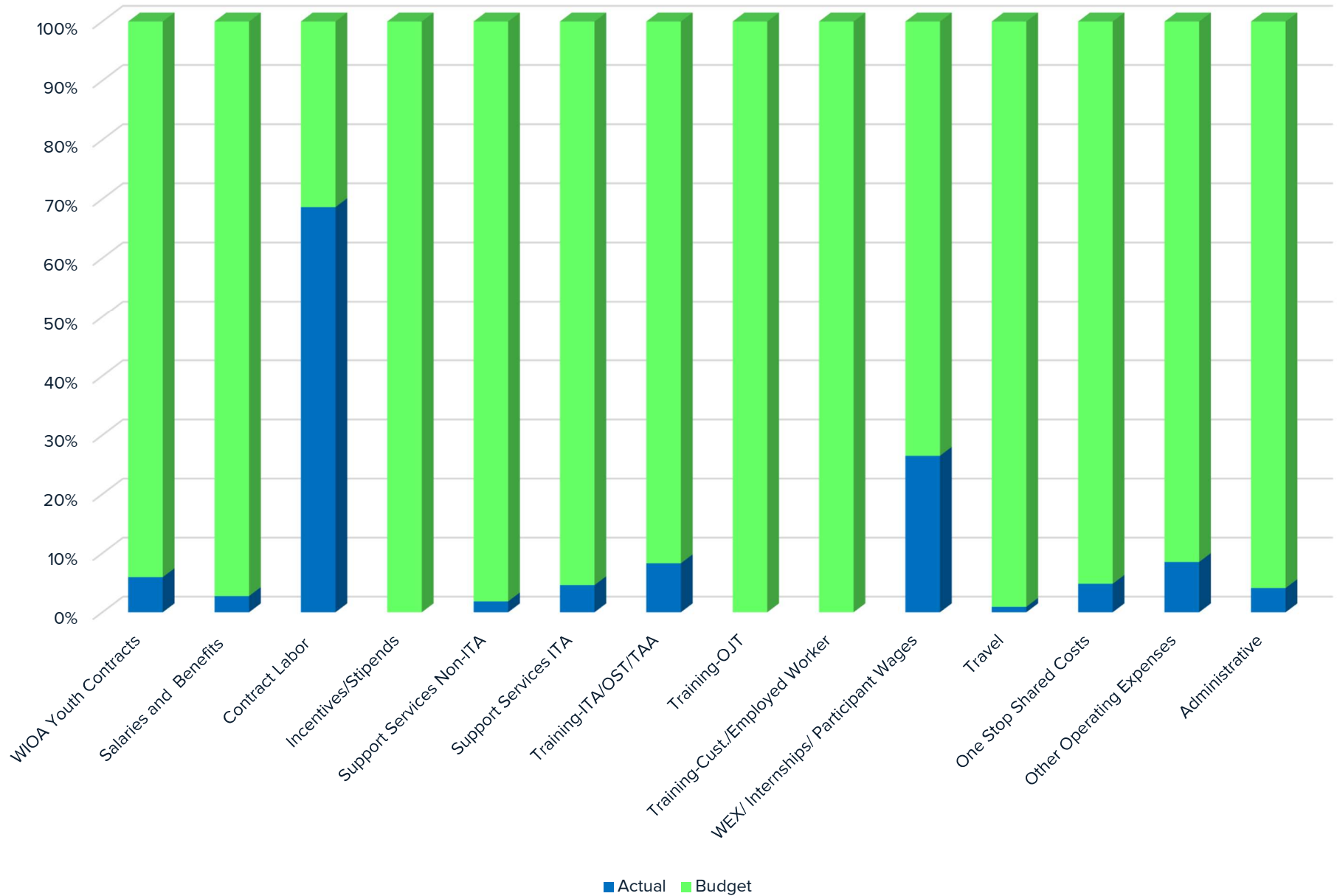
LWDB 20
Summary of Funding and Expenditures
as of July 31, 2024

PY 24-25 TOTAL AVAILABLE FUNDING	475 FAWA	476 Hope Nav	477 Hope Training	48 F.A.T.E.S.	95 Workforce Summit	792 Youth SOS SLC	Other Non NFA	YEAR TO DATE TOTALS			
PY 24-25 Allocations	\$ -	\$ 54,062	\$ -	\$ -	\$ 140,000	\$ -	\$ -		\$ 5,579,208		
PY 24-25 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 164,384		
Additional Funds/Incentives	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -		
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ (511,055)		
Carryforward to PY 25-26	\$ (815,816)	\$ -	\$ -	\$ (88,128)	\$ -	\$ -	\$ -		\$ (2,162,688)		
Carryforward from PY 23-24	\$ 979,600	\$ 30,000	\$ 104,000	\$ -	\$ -	\$ -	\$ -		\$ 3,127,585		
Total DEO Grant Funding	\$ 163,784	\$ 84,062	\$ 104,000	\$ (88,128)	\$ 140,000	\$ -	\$ -		\$ 6,197,434		
OTHER NON DEO REVENUES	\$ -	\$ -	\$ -	\$ 135,000	\$ -	\$ 165,000	\$ 10,539		\$ 310,539		
TOTAL	\$ 163,784	\$ 84,062	\$ 104,000	\$ 46,872	\$ 140,000	\$ 165,000	\$ 10,539	\$ -	\$ 6,507,973		
FUNDING DRAWN DOWN YTD	475 FAWA	476 Hope Nav	477 Hope Training	48 F.A.T.E.S.	95 Workforce Summit	792 Youth SOS SLC	Other Non NFA	PY 24-25 Actual	PY 24-25 Budget	VARIANCE	% Expended
PY 24-25 Allocations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,579,208	\$ 5,579,208	0.000%
PY 24-25 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 164,384	\$ 164,384	0.000%
Additional Funds/Incentives	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (511,055)	\$ (511,055)	
Carryforward to PY 25-26	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (2,162,688)	\$ (2,162,688)	
Carryforward from PY 23-24	\$ 19,213	\$ 3,623	\$ 565	\$ -	\$ -	\$ -	\$ -	\$ 464,333	\$ 3,127,585		
Total DEO Grant Funding	\$ 19,213	\$ 3,623	\$ 565	\$ -	\$ -	\$ -	\$ -	\$ 464,333	\$ 6,197,434		
OTHER NON DEO REVENUES	\$ -	\$ -	\$ -	\$ 135,239	\$ -	\$ 91,409	\$ 3,484	\$ 230,132	\$ 310,539	\$ 80,407	74.107%
TOTAL	\$ 19,213	\$ 3,623	\$ 565	\$ 135,239	\$ -	\$ 91,409	\$ 3,484	\$ 694,465	\$ 6,507,973	\$ 5,813,508	10.671%
% of Total Budgeted Funding Received	11.73%	4.31%	0.54%	288.53%	0.00%	55.40%	33.06%	10.67%			
EXPENDITURES								PY 24-25 Actual	PY 24-25 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ 1,097	\$ 82	\$ -	\$ 4	\$ -	\$ 4,940	\$ 287	\$ 28,779	\$ 671,966	\$ 643,187	4.28%
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 15,450	\$ 511,554	\$ 496,104	3.02%
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 13,329	\$ 160,412	\$ 147,083	8.31%
Allocated Indirect Costs	\$ 1,097	\$ 82	\$ -	\$ 4	\$ -	\$ 4,940	\$ 287	\$ 0	\$ 0	\$ 0	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0	\$ -	\$ 0	
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Program Training	\$ 10,771	\$ 907	\$ -	\$ 38	\$ -	\$ 44,583	\$ 2,622	\$ 314,806	\$ 5,836,009	\$ 5,521,203	5.4%
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 50,620	\$ 800,000	\$ 749,380	6.3%
Salaries and Benefits	\$ 4,181	\$ 601	\$ -	\$ 0	\$ -	\$ 509	\$ 238	\$ 79,236	\$ 2,791,442	\$ 2,712,207	2.8%
Contract Labor	\$ 477	\$ -	\$ -	\$ -	\$ -	\$ 1,751	\$ -	\$ 15,100	\$ 6,903	\$ (8,197)	218.8%
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 12,126	\$ 12,126	0.0%
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 200	\$ 10,600	\$ 10,400	1.9%
Support Services ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 555	\$ 11,500	\$ 10,945	4.8%
Training-ITA/OST/TAA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 27,622	\$ 304,957	\$ 277,335	9.1%
Training-OJT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 309,838	\$ 309,838	0.0%
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 50,000	\$ 50,000	0.0%
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 38,944	\$ -	\$ 38,944	\$ 107,953	\$ 69,009	36.1%
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 314	\$ 33,500	\$ 33,186	0.9%
One Stop Shared Costs	\$ 1,601	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 33,378	\$ 658,174	\$ 624,796	5.1%
Other Operating Expenses	\$ 4,026	\$ 269	\$ -	\$ 36	\$ -	\$ 1,187	\$ 2,256	\$ 68,837	\$ 739,015	\$ 670,178	9.3%
Allocated Program Indirect	\$ 487	\$ 36	\$ -	\$ 2	\$ -	\$ 2,192	\$ 127	\$ (0)	\$ 0	\$ -	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Expenditures	\$ 11,867	\$ 988	\$ -	\$ 42	\$ -	\$ 49,523	\$ 2,909	\$ 343,585	\$ 6,507,975	\$ 6,164,390	5.3%
Funding Over/(under) expenditures	\$ 7,346	\$ 2,635	\$ 565	\$ 135,197	\$ -	\$ 41,886	\$ 576	\$ 350,880			
YTD % of Budgeted Funds Expended	7.25%	1.18%	0.00%	0.09%	0.00%	30.01%	27.60%	5.28%			

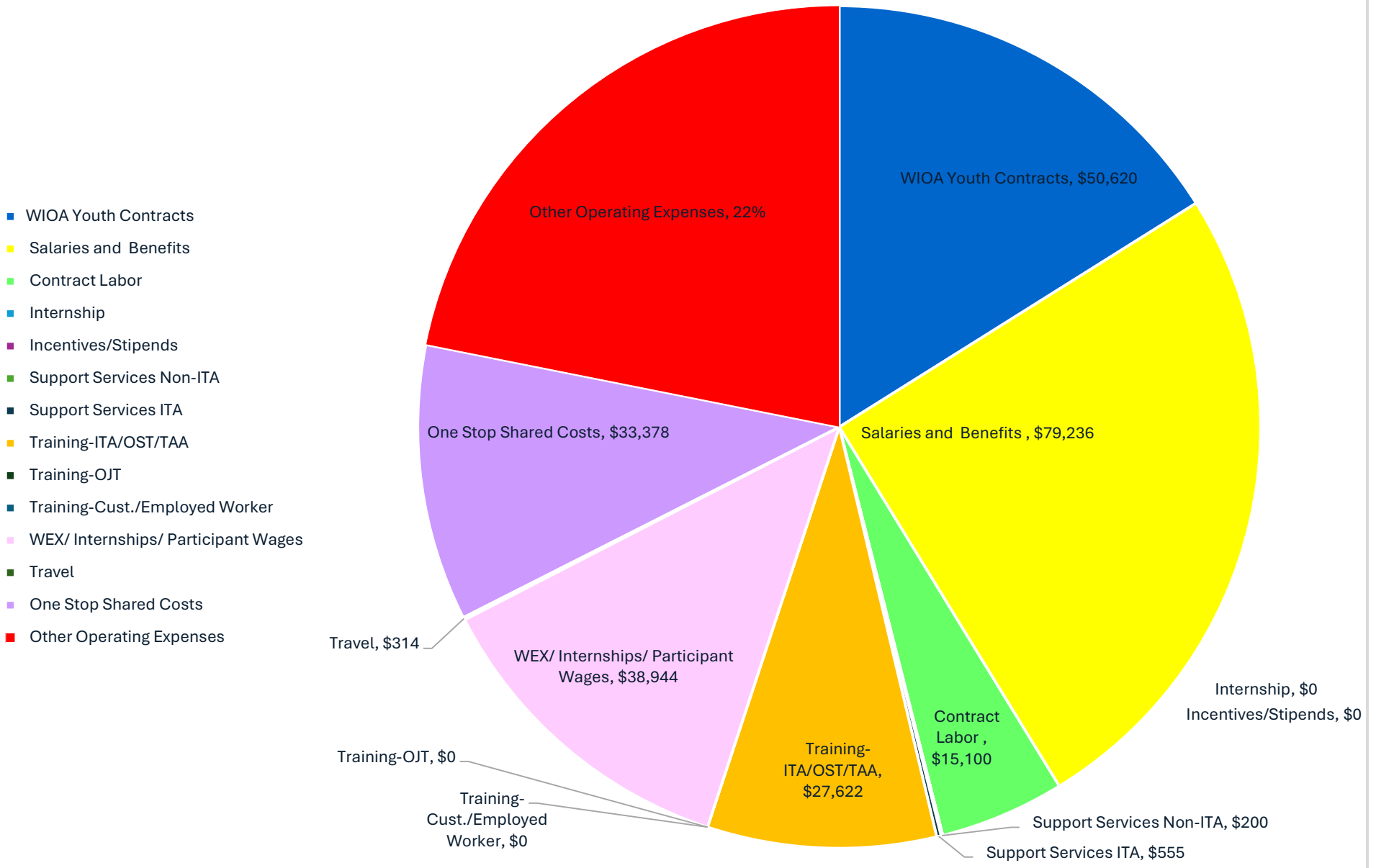
Budget to Actual by Program



Expenditures by Category



Expenditure Categories



Agenda Item 6eii

AGENDA ITEM SUMMARY

Title Review and Approve Wagner Peyser (WP) - Job Seeker Registration, Application, and Services Policy Revisions

Strategic Plans/Goals Operational Intelligence

Policy/Plan/Law CareerSource Florida (CSFL) Administrative Policy 096, 20 CFR 652.207, 652.3, 677.150(a)(3), 1010

Action Requested Review and Approve Wagner Peyser (WP) - Job Seeker Registration, Application, and Services Policy Revisions

Background The purpose of the Employment Service system is to improve the functioning of the nation's labor markets by bringing together qualified job seekers and employers who are seeking workers. The policy was revised to provide more concise guidance regarding job seeker registration, application and services recorded within CSRC's Local Workforce Development Area (LWDA).

Staff Recommendations Review and Approve the Wagner Peyser (WP) - Job Seeker Registration, Application, and Services Policy Revisions

Supporting Material Link to Wagner Peyser - Job Seeker Registration, Application, and Services: <https://8jq6c5.a2cdn1.secureserver.net/wp-content/uploads/2024/09/Executive-Committee-Meeting-Packet-9-13-2024.pdf>

Board Staff

Brian Bauer
President/CEO
bbauer@careesourcerc.com
(866) 482-4473 ext. 418

Agenda Item 6eiii

AGENDA ITEM SUMMARY

Title	Review and Approve Wagner Peyser (WP) - Job Orders and Placements Policy Revisions
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	CareerSource Florida (CSFL) Administrative Policy 099, 20 CFR 651.10, 652, 653.501, 29 CFR 1604, 1606, 1625, 42 U.S.C. 2000
Action Requested	Review and Approve Wagner Peyser (WP) - Job Orders and Placements Policy Revisions
Background	The purpose of the Employment Service system is to improve the functioning of the nation's labor markets by bringing together qualified job seekers and employers who are seeking workers. The policy was revised to provide more concise guidance regarding job orders and placements recorded within CSRC's Local Workforce Development Area (LWDA).
Staff Recommendations	Review and Approve the Wagner Peyser (WP) - Job Orders and Placements Policy Revisions
Supporting Material	Link to Wagner Peyser (WP) - Job Orders and Placements Policy: Executive-Committee-Meeting-Packet-9-13-2024.pdf (secureserver.net)
Board Staff	Revisions Brian Bauer President/CEO bbauer@careesourcerc.com (866) 482-4473 ext. 418

AGENDA ITEM SUMMARY

Title	Welfare Transition (WT) Program - Supportive Services Policy Revisions
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	State Plan, Florida Administrative Code 65A-4.218, and Florida Statute 445.025,
Action Requested	Review and Approve Welfare Transition (WT) Program - Supportive Services Policy Revisions
Background	<p>Under the Temporary Assistance to Needy Families (TANF) State Plan, Florida Administrative Code 65A-4.218, and Florida Statute 445.025, supportive services enable families to remove barriers to participation in work or alternative requirement plan activities and employment, and to leave the program on the path to self-sufficiency. The Local Workforce Development Boards (LWDB) develop policy and local operating procedures that prioritize supportive services based on the needs of individuals.</p> <p>The local policy was updated to expand access to transitional services for eligible participants.</p>
Staff Recommendations	Review and Approve the Welfare Transition (WT) Program - Supportive Services Policy Revisions
Supporting Material	Link to Welfare Transition (WT) Program - Supportive Services Policy Revisions: https://8jq6c5.a2cdn1.secureserver.net/wp-content/uploads/2024/09/Executive-Committee-Meeting-Packet-9-13-2024.pdf
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

AGENDA ITEM SUMMARY

Title	Review and Approve Workforce Innovation & Opportunity Act (WIOA) - Adult and Dislocated Workers Supportive Services Policy Revisions
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Workforce Innovation & Opportunity Act (WIOA)/CareerSource Florida Administrative Policy Number 109
Action Requested	Review and Approve Workforce Innovation & Opportunity Act (WIOA) - Adult and Dislocated Workers Supportive Services Policy Revisions
Background	<p>WIOA requires access to supportive services that participants may need to overcome barriers that affect their abilities to successfully participate in and/or to complete training activities. CSRC shall authorize payment for supportive services when a participant demonstrates financial need, when the participant will not be successful without the support, and when no alternative funding is available to pay for the supportive service(s). WIOA-funded supportive services are requested at the Career Planner’s discretion and are reviewed for approval on a case-by-case basis by the Center Manager and Program Coordinator.</p> <p>To align with the revised <i>CareerSource Florida Administrative Policy Number 074 - Individual Training Account Expenditure Requirements and Waiver Request Process</i>, staff revised CSRC’s WIOA A/DW Supportive Services Policy as follows:</p> <ul style="list-style-type: none"> • Books and Education Fees (which were previously paid via ITA funding) were added as available types of supportive services based on current WIOA guidelines. • Specified quantity limitations per program year for the payment of Books and Education Fees using supportive services funding. Review and Approve Workforce Innovation & Opportunity Act (WIOA) -Adult and Dislocated Workers Supportive Services Policy Revisions
Staff Recommendations	Review and Approve the WIOA - Supportive Services Policy Revisions
Supporting Material	<p>Link to WIOA - Supportive Services Policy Revisions: https://8jq6c5.a2cdn1.secureserver.net/wp-content/uploads/2024/09/Executive-Committee-Meeting-Packet-9-13-2024.pdf</p>
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>



AGENDA ITEM SUMMARY

Title	Workforce Innovation & Opportunity Act (WIOA) - Eligible Training Provider List Policy Revisions
Strategic Plans/ Goals	Operational Intelligence
Policy/Plan/Laws	WIOA, Sections 122, 133; WIOA Regulations, 20 CFR 680.400et seq., Subpart D, Florida Statutes, Chapter 445
Action Requested	Review and Approve Workforce Innovation & Opportunity Act (WIOA) - Eligible Training Provider List Policy Revisions
Background	Local Boards are required to revise their policies for the selection and retention of Eligible Training Providers (ETPs) and their programs to be consistent with WIOA. A local Board, through local policy may establish criteria and required information for training program eligibility within its local area. This policy also includes the requirements for Eligible Training Providers in accordance with Administrative Policy from CareerSource Florida.
Staff Recommendation	Approve the WIOA - Eligible Training Provider List Policy Revisions
Supporting Material	Link to WIOA - Eligible Training Provider List Revisions: https://8iq6c5.a2cdn1.secureserver.net/wp-content/uploads/2024/09/Executive-Committee-Meeting-Packet-9-13-2024.pdf
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

AGENDA ITEM SUMMARY

Title Review and Approve Workforce Innovation & Opportunity Act (WIOA) - Adult and Dislocated Worker Program Eligibility Policy Revisions

Strategic Plans/Goals Operational Intelligence

Policy/Plan/Law Workforce Innovation & Opportunity Act (WIOA)/CareerSource Florida Administrative Policy Number 122

Action Requested Review and Approve Workforce Innovation & Opportunity Act (WIOA) - Adult and Dislocated Worker Program Eligibility Policy Revisions

Background The WIOA Adult and Dislocated Worker programs provide career and training services to eligible and suitable participants to assist them in obtaining quality, self-sufficient employment in in-demand industries within this region. To participate in WIOA programs, adult and dislocated worker candidates must meet general eligibility requirements and provide acceptable documentation.

To better align with CareerSource Florida’s Administrative Policy Number 122, staff revised CSRC’s WIOA A & DW Program Eligibility Policy as follows:

- Relevant information previously outlined in CSRC’s *Definition of 'Unlikely to Return' for DW Eligibility Policy* and CSRC’s *Substantial Layoff Policy* was added to the A & DW Eligibility Policy for clarity, effectively converging 3 policies into 1 comprehensive policy.
- Updated Selective Service registration requirements based on current WIOA guidelines.
- Added definitions of Family Size and defined associated criteria, such as dependent child versus independent child for WIOA Adult income eligibility purposes.
- Revised the “Calculating Family Income for the Adult Program” section for clarity.

Staff Recommendations Review and Approve the WIOA - Adult & DW Program Eligibility Policy Revisions

Supporting Material Link to WIOA Adult & DW Program Eligibility Policy Revisions: [Executive-Committee-Meeting-Packet-9-13-2024.pdf \(secureserver.net\)](#)

Board Staff Brian Bauer
President/CEO
bbauer@careersourcerc.com
(866) 482-4473 ext. 418



AGENDA ITEM SUMMARY

Title	Review and Approve WIOA Youth Services Subrecipient Contract for PY2024-2025 (PY 4 of 5)
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Board Policy/Board Responsibility
Action Requested	Review and Approve the Renewal of WIOA Youth Services Subrecipient Contract for PY2024-2025
Background	<p>CareerSource Research Coast entered into a multiple-year sub-recipient procurement for the provision of WIOA Youth Services.</p> <p>CSRC staff will report to the Board of Directors on the fiscal and programmatic risk evaluation and intent to renew the WIOA Youth Services contract with a current service provider or seek a new sub-recipient.</p>
Staff Recommendations	Review and Approve WIOA Youth Services Subrecipient Contract for Program Year 2024-2025
Supporting Material	WIOA Youth Subrecipient Contract
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418



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ECKERD CONNECTS, INC. (DUNS #08-068-1158)
 SUBRECIPIENT AGREEMENT: 20-002-YWS
 FAIN: 24-A-55-AY-000073
 ORIGINAL APPROVAL DATE: 9/25/2024
 CONTRACT BEGIN DATE: 7/01/2024
 CONTRACT END DATE: 6/30/2025

Subrecipient Agreement FOR THE SERVICE PROVIDER OF THE LOCAL WORKFORCE DEVELOPMENT AREA 20 CAREER CENTER SYSTEM

Title 2 – Subtitle A – Chapter II – Part 200 – Subpart D - § 200.332: Requirements for pass-through entities.	
(a) The following sub-award information is provided by CSRC, the Pass-Through Entity, to Eckerd Connects, Inc., the Sub-Recipient. If/when any of these data elements changes, the change(s) will (also) be included in any subsequent sub-award modification(s).	
(1) Federal Award Identification.	
Sub-Recipient name (which must match the name associated with its unique entity identifier)	Eckerd Connects, Inc.
Sub-Recipient’s unique entity identifier	DUNS # 080681158
Federal Award Identification Number (FAIN)	23-A-55-AY-000003 24-A-55-AY-000073
Federal Award Date	July 1, 2024
Sub-Award Period of Performance: start/end dates	July 1, 2024 – June 30, 2025
Amount of Federal funds obligated by this action	\$800,000
Total amount of Federal funds obligated to the Sub-Recipient	\$800,000
Total amount of Federal Award to CSRC	\$1,279,294
Federal award project description	WIOA Youth Services Provider
Name of Federal awarding agency Pass-through entity, and Contact information for awarding official	Federal awarding agency: For WIOA: U. S. Dept. of Labor through State of Florida, FloridaCommerce Pass Through Entity: CareerSource Research Coast Contact information: Tracey McMorris, Vice President of Operations tmc Morris@careersourcerc.com
Assistance Listing Number	17.259 -WIOA Youth
Is this sub-award for R&D?	No
Indirect Cost Rate	25.962%



THIS AGREEMENT is entered into between Workforce Development Board of the Treasure Coast, Inc, d/b/a CareerSource Research Coast, hereinafter referred to as “CareerSource Research Coast” (CSRC) and Eckerd Connects, Inc., hereinafter referred to as the “Service Provider.”

CONTRACT TERM

THIS AGREEMENT will be in effect from July 1, 2024, through June 30, 2025, provided the Service Provider meets CSRC performance expectations. All services must be delivered during this period to qualify as part of this agreement. Through this Agreement the Service Provider shall provide services for CSRC as described in the attached Statement of Work. None of these services may be subcontracted to another party without the knowledge and approval of CSRC.

In return, CSRC shall compensate the Service Provider for services rendered in an amount not to exceed **\$800,000** in accordance with the Payment Terms of this Agreement, unless otherwise modified by mutual consent of both parties.

This Agreement consists of the following attachments:

- Statement of Work
- Monitoring and Evaluation
- Technical Assistance and Guidance
- Payment Terms
- Budget
- Designation of Contract Personnel
- Signatory Authority
- Program Progress Report
- Certifications and Assurances
- Public Entity Crimes
- Certification Regarding Scrutinized Companies
- Certification Regarding Debarment, Suspension and Other Matters
- Anti-Lobbying Certification
- Non-discrimination and Equal Opportunity Provisions
- Certification Regarding a Drug-Free Workplace
- Certification Regarding Scrutinized Companies
- Local Definition for Youth Requiring Additional Assistance

CSRC will provide the Service Provider with copies of the Workforce Services Plan, other contracts and agreements governing programs and services outlined in the attached Statement of Work, and policies and procedures specific to WIOA Youth, as requested.



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SIGNATURES AND ATTESTATIONS

IN WITNESS THEREOF, the parties hereto have caused this AGREEMENT and Attachments to be executed by their undersigned officials as duly authorized.

**SERVICE PROVIDER – ECKERD
 CONNECTS, INC.**

**THE WORKFORCE DEVELOPMENT BOARD
 OF THE TREASURE COAST, INC. d/b/a CAREERSOURCE
 RESEARCH COAST**

 Name and Title of Certifying Representative

Brian K. Bauer, President/CEO

 Name and Title of Representative

 Signature

 Signature

 Date

 Date

DRAFT



ATTACHMENT A – STATEMENT OF WORK

PROGRAM SUMMARY: The Service Provider will provide program-based, workforce development activities and services to targeted youth at a contract value ratio of no less than 75% of funds spent on Out-of-School Youth and no more than 25% of funds spent on In-School Youth as specified by WIOA regulations.

TARGET GROUPS:

Out-of-School Youth must be age 16-24, not attending any school, and meet one or more additional conditions, which may include:

- School dropout; within age of compulsory attendance but has not attended for at least the most recent complete school year calendar quarter; holds a secondary school diploma or recognized equivalent and is low income and basic skills deficient or an English language learner; subject to the juvenile or adult justice system; homeless, runaway, in foster care or aged out of the foster care system, eligible for assistance under section 477 of the Social Security Act, or in an out-of-home placement; pregnant or parenting; and individual with a disability; low income person who requires additional assistance, as defined by CareerSource Research Coast (CSRC), to enter and complete an educational program or to secure and hold employment.

In-School Youth must be age 14-21, attending school, low income, and meet one or more additional conditions, which could include:

- Basic skills deficient; English language learner; an offender; homeless, runaway, in foster care or aged out of the foster care system; pregnant or parenting; an individual with a disability; a person who requires additional assistance, as defined by CSRC, to enter and complete an educational program or to secure and hold employment.

OUTREACH & RECRUITMENT:

The Service Provider's project staff will network within the three county Local Workforce Development Area 20 (LWDA 20) to outreach and form connections with partners/collaborators, social service organizations, and school districts to achieve required numbers. Total number served includes all applicable youth carried in from previous program year. The CSRC website will also be used as a tool to gather preliminary data for referral.

All outreach/marketing tools developed by the Service Provider for this purpose will be created in collaboration with CSRC staff and will brand as the CareerSource Research Coast Youth Connections program and will be submitted to the CSRC Communications Manager for final approval prior to use. Outreach and recruitment will be on-going to ensure a constant flow of youth entering and exiting the program.

ELIGIBILITY ASSESSMENT/WIOA REGISTRATION:

The Service Provider will provide services to the existing active carryover caseload of **80** young adults, consisting of 20 ISY and 60 OSY and will recruit and enroll at least **70** additional young adults, comprised of 53 OSY and 17 ISY during the 2024-2025 program year throughout the three-county area. The Service Provider will serve a total of **150** young adults (80 carry-forward + 70 new enrollments). Program will provide continuous enrollment and work to exceed enrollment goals as long as funding allows. An enrollment is defined by determining Workforce Investment Opportunity Innovation Act (WIOA) eligibility and creating participation in the State system.



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All youth must be WIOA eligible to receive services in the Youth Connections program. Ineligible youth will be referred to other appropriate community resources and/or to CSRC for universal client services. The Service Provider will market, recruit, and collect eligibility paperwork to determine WIOA eligibility. This is tracked through a project management software and Employ Florida. The eligibility criterion adheres to the requirements as set forth by the WIOA legislation:

Out-of-School Youth must be age 16-24, not attending any school, and meet one or more additional conditions, which may include;

- School dropout; within age of compulsory attendance but has not attended for at least the most recent complete school year calendar quarter; holds a secondary school diploma or recognized equivalent and is low income and basic skills deficient or an English language learner; subject to the juvenile or adult justice system; homeless, runaway, in foster care or aged out of the foster care system, eligible for assistance under section 477 of the Social Security Act, or in an out-of-home placement; pregnant or parenting; and individual with a disability; low income person who requires additional assistance, as defined by CSRC , to enter and complete an educational program or to secure and hold employment.

In-School Youth must be age 14-21, attending school including postsecondary school, low income, and meet one or more additional conditions, which could include:

- Basic skills deficient; English language learner; an offender; homeless, runaway, in foster care or aged out of the foster care system; pregnant or parenting; an individual with a disability; a person who requires additional assistance, as defined by CSRC, to enter and complete an educational program or to secure and hold employment.

Further, by the guided interview process, it will be determined if the youth model will meet the youth customer's needs and interests. Not all youth will be suitable for Youth Connections. Project staff will gather all required eligibility documents, determine eligibility and input the information into Employ Florida. Files will be checked and reviewed by Service Provider management for eligibility and accuracy prior to being data entered into Employ Florida. An approved basic skills assessment (CASAS) will be used for basic skills assessment in order to establish standardized Literacy and Numeracy levels. Upon youth participation, the service provider will facilitate intake and assessments through appropriate resources, including CSRC's assessments to determine interests, values, aptitudes and preferences. The Service Provider will examine the participant's work experience and academic history to develop a list of current and potential career choices for participants. This will also help staff members in developing the Individual Service Strategy (ISS). If eligibility issues arise and cannot be satisfactorily resolved to the satisfaction of CSRC, disallowed costs from the sole negligence of the Service Provider will be repaid by Eckerd using nonfederal funds.

ASSESSMENT & DEVELOPMENT OF INDIVIDUAL SERVICE STRATEGIES:

With the cooperation and commitment of each young adult and their family whenever possible, an ISS will be developed and barriers to each student's success determined. The approved basic skills assessment will be used to get standardized Literacy and Numeracy levels. The Project staff will develop an individual plan that the student is aware of and agrees to. Other assessments will be utilized as deemed appropriate. These tools help our Career Coaches develop the ISS which is tracked using Employ Florida.



GOAL SETTING & DOCUMENTATION PROCESS:

The Service Provider's Career Coaches will record all activities with a participant through timely and accurate case notes, CSRC's document management system, applications, enrollments, goals (both planned and achieved), program outcomes, and follow-ups. The Service Provider's Manager or their designees will conduct case file reviews on a regular basis.

CASE MANAGEMENT:

Case management will be developed to encourage inter-organizational partnerships to maximize the utilization of resources to support the needs of the youth. The Service Provider will provide referrals to make sure that each student is getting the appropriate professional support as needed. This is all case noted in the Employ Florida and scanned into the document management system.

BASIC SKILLS/ALTERNATIVE SECONDARY:

The Service Provider will evaluate youth academic skills utilizing an approved basic skills assessment (CASAS) in reading and math. The youth's prior educational history and the results of the basic skills assessment will be utilized to identify methods and resources to assist the youth to improve literacy skills at least one educational functioning level each year. Youth will be offered the opportunity to enroll in adult basic education, English Language Learning (ELL), or GED remediation to pursue a high school diploma, as appropriate.

The Service Provider will also offer a limited number of scholarships for participants to enroll in Penn Foster, an alternative secondary school that evaluates the youth's most recent high school transcript and will develop a learning plan that will establish a specific number of courses to be completed to earn a nationally recognized and accredited secondary diploma.

WORK READINESS SKILLS:

The Service Provider will utilize a range and variety of tools and resources to help youth attain and/or improve basic workforce readiness skills. These tools are used to test students' skills, provide both pretests and posttests to make initial assessments and gauge student progress, create assignments based on students' pretest results, monitor student scores and completion of activities, and produce reports for individual students and provide documentation which will be included in the case file.

Enrolled youth are eligible for CSRC approved incentive policies that include up to \$600 for in-school youth and up to \$650 for out-of-school youth in achievement-based incentives. Incentive payments are subject to funding availability.

INTERNSHIP/JOB SHADOWING:

The Service Provider will target youth to participate in Internship with a minimum of 90% of contracted WEX hours completed to be considered a successful completion. A minimum of 25% of regional allocation, or \$222,735.00 must be spent on Internship expenditures related to participant wages and incentives (YESS Class Completion, Job Shadowing and Internship Completion Bonus), staffing and other applicable costs dedicated to the development, execution and oversight of work-based learning activities. Students will have an opportunity to earn a wage set at \$15.00/hour, and hours of WEX will be based on the needs of the placement to provide adequate



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training to proficiency which will be written in the individual training plan with a maximum of 360 hours or 12 weeks, whichever comes first. This will be based on individual participant needs and goals, for paid Internship activities. The service provider will be responsible for tracking and ensuring that the appropriate allocated WX funding is spent by the end of the program year. Workers Compensation coverage will fall under the State of Florida's insurance policy for WIOA participants. The Service Provider will be responsible for providing guidance and information regarding the possible tax responsibilities to participants and families.

CREDENTIALS & TRAINING VOUCHERS:

The Youth Connections Program will prepare youth to attain State and Industry recognized credentials and/or industry recognized work readiness certifications as outlined on the Florida Master Credentials List to increase the opportunity to enter unsubsidized employment. The service provider will provide recognized credentials that can be stand alone or stacked. The Service Provider also encourages and assists youth to obtain credentials and certifications through our partner agencies and schools. Youth will be provided multiple avenues to achieve credentials throughout the delivery of the program based on their Individual Service Strategy (ISS) and program related goals and outcomes.

The Youth Connections program will also offer scholarships for youth participants to pursue certifications in entry-level career paths within in- demand, high growth occupations. The time frame for the completion of the certifications will be based on the training and the contract with the training provider.

SUPPORT SERVICES:

Support Services will be administered through the Service Provider based on the individual needs and barriers of the participant, then reviewed by the Career Coach and by the Service Provider project management staff to ensure compliance with local policies and procedures. These requests, documented in Employ Florida case notes, will be processed for payment by Service Provider's fiscal department and documented in the student file in the document management system and in the monthly billing report.

FOLLOW-UP:

A year-round approach to case follow-up will be conducted. Carry forward follow-up caseload is estimated to be 80 young adults as of July 1, 2024, with additional clients moving into follow-up services monthly, based on last date of services, as defined by WIOA. Clients in follow-up will receive any of the 14 youth elements allowable in follow-up along with support and capture of required performance outcomes. Client may receive incentives up to \$150 for placement in employment or education during the follow-up portion of the program and may receive additional support services funding up to \$175 to earn necessary credentialing for performance.

Follow-up services include, but are not limited to, tracking progress on the job, the development of increased skills and certifications, support services, financial literacy, and incentives to support retention and/or completion of education and employment services. The Service Provider will complete quarterly follow-ups and will specifically be tracking the 2nd and 4th quarter retention of employment or continuation of post-secondary placement after exit. The Service Provider will assist youth within the parameters of WIOA requirements and comply with the required follow-up increments. This will all be entered and case noted in Employ Florida.



PARTNERSHIPS:

The Service Provider has established or is in the process of establishing partnerships with the following: Indian River State College, Treasure Coast Technical College, Children’s Service Council of Martin County, Children’s Service Council of St. Lucie County, 211/United Way, Children’s Home Society, Helping People Succeed, St. Lucie County Schools, Martin County Schools, Indian River County Schools, The Early Learning Coalitions for Indian River, Martin and St. Lucie Counties, Gifford Youth Achievement Center, Tykes and Teens, Boys & Girls Clubs of Martin and St. Lucie Counties, Treasure Coast Homeless Service Council, Drug Free St. Lucie County, St. Lucie County Roundtable, Martin County Interagency Coalition, Pace Center for Girls, GraceWay Village, Treasure Coast Food Bank, Mustard Seed Ministries, Good Samaritan Center, Hope for Families, United Against Poverty, Department of Juvenile Justice, Gulfstream Goodwill Industries, Florida Department of Health Martin and St. Lucie County, Mary’s Home of the Treasure Coast, Ignite Youth Alliance, and many others. Partnership reviews will be included with reports to the CSRC Board of Directors and in the final narrative report for the program year.

ROLES OF THE PARTNERS:

The Service Provider will provide overall project design, support and implementation of all required WIOA Youth program elements for the levels of service described in this statement of work. CSRC will assist the program by providing some office space, linkages to other services, and client access to computer resources. The Service Provider will ensure a high level of coordination and integration with CSRC. The Service Provider staff will work together with appropriate CSRC staff for a seamless delivery of all available services. Project staff will provide program eligibility, workshop training, linkages with business services for job development, and program outcomes.

Facilities:

Port St. Lucie

CareerSource Research Coast Career Center – 584 NW University Blvd, Suite 400, Port St. Lucie, FL 34986

Vero Beach

Treasure Coast Technical College-4680 28th Court Room 2-201, Vero Beach, FL 32967

Fort Pierce

Garden City Early Learning Academy Annex Rm. 14 – 2102 NW Ave Q, Fort Pierce, FL 34950

Martin County

CareerSource Research Coast Career Center-710 SE Central Pkwy, Stuart, FL 34994

These facilities conform to all codes and requirements and are ADA accessible or reasonable accommodations can be made. Facilities may provide temporary in-kind space for the duration or part of the program during the year.

WORK PLAN SERVICES AND ACTIVITIES:

Activities and services are designed to help youth develop lifelong skills and career pathways, while overcoming obstacles and barriers, through a seamless integration of services. The program will help lead WIOA eligible young adults to outcomes of career pathways and/or post-secondary education.



WIOA YOUTH PROGRAM SERVICES AVAILABLE:

The following WIOA youth program elements are made available to each youth during the program. These are independently driven by the participants' needs. Any service needed will be identified in the ISS.

14 WIOA Required Youth Program Elements	Provider, or Referral Agency	Instructional Activities/Curriculum
1. Tutoring, academic remediation; study skills training, and instruction leading to secondary school completion, including dropout prevention strategies	Eckerd / Public school partners	Computer based training/instructor facilitated, FSA and GED Practice, GED Prep materials, e.g. Khan Academy (online), Practice GED exams, and instructional teacher-aided tools that are also used as a one-to-one instructional resource with minimal guidance (online); 21 st Century Skills
2. Alternative secondary school offerings	Eckerd/ Public school partners	Florida State Standards; Penn Foster
3. Paid and unpaid Internships with an academic and occupational educational component	Eckerd/ Community Business partners, CBO's, FBO's	ECKERD Documented Internship activities; job shadow activity
4. Occupational skills training with a focus on recognized postsecondary credentials and in-demand occupations	Eckerd / Approved Training Provider Partners	Various. Based on identified occupations/career fields on the Targeted Occupations List with Approved Training Providers
5. Leadership development opportunities, including positive social behavior and soft skills, decision making, teamwork, etc.	Eckerd in connection with various community partner agencies and employers	Community service, peer-centered activities, Employability Skills, Life Skills curriculum that includes leadership development, health, nutrition, sexual behavior, and substance abuse prevention
6. Supportive Services	Eckerd in connection with various partner agencies and/or employers	Independently driven by participant needs. Supportive services for educational training and employment activities such as gas cards, bus passes, emergency assistance, driver's license, state identification, professional clothing, background checks and childcare
7. Adult mentoring for at least 12 months	Eckerd in connection with partner agencies and employers	Independently driven by participant needs. Case managed and documented. Includes recruitment of both community-based and employer-based mentors and partnership with established mentorship programs



8. Comprehensive guidance and counseling	Eckerd and/or community agencies	On-going intensive case management. Community/locally based programming
9. Follow-up services no less than 12 months after exit	Eckerd	Independently driven by participant needs. Contact with employer, post-secondary entities, job retention coaching, academic support, incentives, support, career and education counseling. (Continuous service until participant has completed follow-up period of 12 months)
10. Workforce Concurrent Education	Eckerd and/or community agencies	Independently driven by participant needs. Utilizing local workforce system, work readiness training, Partnership with post-secondary and local training providers and employers to encourage youth to see education as part of their career pathway
11. Financial Literacy	Eckerd in connection with partner agencies	Independently driven by participant needs. Partnerships with local financial institutions
12. Entrepreneurial Skills Training	Eckerd and/or community agencies	Independently driven by participant needs. Partnerships with local business and community-based business organizations
13. Labor Market and Local Employment Information	Eckerd/CSRC	Independently driven by participant needs. Utilizing local workforce system; ongoing career pathway discussions to include LMI and local career opportunities
14. Post-Secondary Preparation and Transition Services	Eckerd and/or community agencies	Independently driven by participant needs. Partnerships with post-secondary educational institutions and community organizations

Summary of Main Components and Intent are as follows:

- **Outreach** - engaging caseload for increased participation and identification of new participants.
- **Assessment** – determining ‘suitability’ for successful participation and referral to other appropriate alternatives for youth who are not eligible or suitable for WIOA services.
- **WIOA Eligibility/Registration** - Compiling proper documentation for WIOA eligibility.
- **Case Management** – Actively engaging and managing the youth caseload and meticulous documentation in Employ Florida for progress toward activity/goal completion and positive outcomes.
- **High School Diploma/GED Attainment** – GED/High School Diploma preparation and attainment will be achieved by using various tools and resources AND through partnering with the school districts and college system.
- **Internship** – determining suitability for Internship/job shadowing and case managing all aspects of the placements; partnering with businesses, CBO’s, and the CSRC Business Services Unit to recruit meaningful work experience sites.



- **Credentials** – providing training for industry recognized credentials and linking WIOA participants to existing community resources for short term training that will lead directly to employment opportunities.
- **Follow-up Services** – Providing follow-up services for youth who exit during the 30, 60, and 90 days after exit and then continue in the 2nd, 3rd, and 4th quarter after exit to ensure program effectiveness.

GOALS:

- A. An average caseload of 142 active WIOA Youth will be served during program year 24-25. The number served includes carry in youth from previous program year, as well as newly eligible and enrolled youth. Service Provider will enroll a minimum of **70** new WIOA eligible youth between July 1st, 2024 and June 30th, 2025. 100% of all contracted enrollment of youth will be completed, accurately and timely, and entered in Employ Florida and Eckerd's data management system by 06/30/2025.
- B. A minimum of 81% of all contracted enrolled WIOA youth receiving training services (occupational skills activities, secondary or post-secondary activities, or on-the-job training activities) will successfully engage in documented skills gains. Skills gains are defined as:
1. Training Milestone: Evaluations completed by an employer or training provider documenting the achievement of established milestones on-the-job training period. Employer/training provider evaluations completed during job shadowing activities or work experience/internship activities cannot be utilized to document a training milestone measurable skills gain.
 2. Skills Progression: Documentation showing the successful completion of an exam required for an occupation, satisfactory attainment of an element or an industry or occupational competency exam or other completion test required to obtain a credential.
 3. Attainment of a Secondary School Diploma or its Equivalent: Documentation showing the participant earned a high school diploma or tis state-recognized equivalent.
 4. Educational Functioning Level: Results from a pre and post CASAS exam or other literacy numeracy test approved by the National Reporting System (NRS) showing an increase of at least one functional level in reading and/or math.
 5. Secondary or Post-Secondary Transcripts/Report Card: Report card/transcripts for one semester showing the client is achieving academic standards. Secondary school credits or secondary school Carnegie credits may be accepted.
 6. Other approved WIOA related work preparation attainments, as defined and approved by CSRC.
- C. A minimum of 80% of all contracted enrolled WIOA defined youth who are terminated from the contractor's program will be terminated with a WIOA defined positive exit of employment placement. In addition, no more than 30% of contracted enrolled WIOA defined youth who are terminated from the contractor's program will be terminated with a WIOA defined positive exit of post-secondary placement. Youth terminated from program may be calculated in one or both outcome requirements, with appropriate documentation and entry of outcomes into Employ Florida.
- D. A minimum of 89% of all contracted WIOA defined youth enrolled in a training program will attain a degree, certificate, or occupational skills credential as outlined on the Florida Master Credentials List prior to exit from the WIOA program. The measure will be calculated as the total number of youth exited with credential divided by the total number of youth exited who have received training related services from the program each month. Data verified from EF report.
- E. Youth will be placed into paid Internship opportunities with local employers. The service provider will ensure that 25% of the funding provided is spent on WEX internship placements. Youth must complete 90% of the



scheduled hours to receive a completion bonus. Additionally, the internship may be considered successful if the internship ends due to direct hire employment with the internship site or an alternate employer for a higher wage.

- F. A minimum of \$222,735.00 will be charged as approved work-based learning related expenditures.
- G. Service Provider will document employer engagement by collecting a minimum of 40 employer surveys (direct hire or internships), 20 of which will be private business employers. Service Provider will obtain or retain at least 25 community employer partners as documented by internship agreements.

SUBCONTRACTS:

If the Service Provider needs to subcontract any services, the terms of the contract and payment for services rendered must meet WIOA guidelines and will remain the sole responsibility of the Service Provider. Funds to cover the cost of the service will be provided by CSRC through this contract. The Service Provider must not subcontract the entire youth activities program. Acceptable subcontracts may include assessment, transportation, instruction, and other program components better delivered by a source other than the Service Provider. The Service Provider must notify CSRC, in writing, 30 days prior to subcontracting any services not covered in this agreement.

REPORTS AND EVALUATION:

The Service Provider will submit a monthly report that includes, In-School and Out-of-School, performance and is to be submitted via email at the following intervals: (See Attachment I)

- By the 5th day of the following month;
- Upon completion of the programs*

*Note: In the final Internal Performance Report narrative comments related to program goals, outcomes and overall programs should be included.

RECORDKEEPING:

The Service Provider must maintain records on each participant in sufficient detail to demonstrate compliance with the relevant contractual criteria related to the training and employment as contained in this agreement. At a minimum, the case file must contain the following: eligibility documents, copies of attendance sheets and progress reports, pre and post assessment results, case notes, termination, disciplinary reports, copies of activities, credentials, or other documents of program activities completed by the participant, and other pertinent information needed to document participation, progress, and results. All case files must be scanned to the document management system.

The Service Provider's Career Coaches will record all activities with a participant through timely and accurate case notes, applications, activity codes, goals, both planned and achieved, program outcomes, and follow ups. The Service Provider will enter all appropriate information into Employ Florida, the Work Certified or YESS Learning Management System and the document management system. Case management notes will be available to service providers throughout the system. The Service Provider will coordinate and process support services requests in accordance with CSRC policies and procedures. Service Provider will ensure that all staff attend training coordinated by CSRC or the State when available and provide documentation of such training to CSRC



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as requested. The Service Provider will maintain all files in accordance with the requirements of the contract with CSRC and established policies and laws.

The Service Provider must maintain financial records sufficient to account for all funds received from CSRC and spent on the program.

All records will be made available to CSRC, state and federal officials, independent monitors and/or auditors. Records will be retained for a period of three years following the date of final expenditure report for this agreement or until all audit questions and concerns have been resolved, whichever is later.

INSURANCE:

The Service Provider will utilize worker's compensation insurance provided by the State of Florida for youth participants engaged in Internships or related activities. The Service Provider must carry commercial liability insurance of \$1 million or more, property insurance on equipment and other property belonging to CSRC, worker's compensation on staff employees, and a surety bond (minimum \$100,000 for faithful and honest performance or the average amount of funds on hand) on employees who process and expend funds related to this Agreement. CSRC must be named as an additionally insured on applicable liability policies and a copy of the proper insurance certificates must be submitted with signed copies of this Agreement within 30 days of project startup or prior to the advancement of funds.

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ATTACHMENT B – MONITORING & EVALUATION

CSRC staff and their subcontracted independent monitoring/audit provider and the State of Florida's Department of Commerce (FloridaCommerce) will monitor the program for programmatic and fiscal accountability. Monitoring visits may include reviews of participant files, program activities, curriculum, progress reports, the Service Provider's financial records, etc., as necessary to ensure that the program meets the intent and guidelines of this agreement, and all applicable laws, rules and regulations.

At the end of the project, the Service Provider will provide CSRC with reports of performance measured against agreement terms. CSRC staff will verify that these reports are accurate and complete.

During monitoring, if the Service Provider is found to be out of compliance with the terms of this Agreement, WIOA, CSRC policies, or any other governing document, the Service Provider will complete a Corrective Action Plan. This plan will be in writing and submitted to CSRC within twenty (20) working days from the receipt of written notification from CSRC that corrective action is required. CSRC will either accept or reject this plan and will notify the Service Provider of its decision in writing.

The Service Provider will provide assistance and access to records to federal and state monitors conducting program reviews, as requested. If found out of compliance during these reviews, the Service Provider will provide CSRC with a written Corrective Action Plan addressing federal and state monitors' concerns.

All monitoring and Corrective Action plans will comply with state and federal regulations.

In addition, the Service Provider will monitor individual program performance to ensure compliance and fulfillment of established federal, state, and local performance objectives. These reports are consolidated by the Service Provider's Area Manager and summarized in a monthly report to the funding agency.

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ATTACHMENT C – TECHNICAL ASSISTANCE & GUIDANCE

CSRC will provide technical assistance and guidance to the Service Provider as requested in writing, or as the results of monitoring. Assistance will be provided in the areas of management, programmatic, and fiscal systems. CSRC staff, jointly with the Service Provider, will develop a written plan for technical assistance as follows:

- Conduct a Service Provider interview
- Identify areas where assistance is needed
- Identify and assign staff who are to be involved
- Set a timetable for completing assistance
- Establish benchmarks to be achieved

The Service Provider will participate in entrance and exit interviews with CSRC staff to facilitate planning and follow-up of technical assistance.

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ATTACHMENT D – PAYMENT TERMS

COMPENSATION & TIME PERIOD: CSRC will reimburse the Service Provider for expenses incurred during the performance of duties outlined in this agreement in the amount not to exceed \$800,000 for the Youth Connections Program, with the final invoice submitted to CSRC by July 15, 2025, unless otherwise modified. Under the terms of this contract payments may be made on a cost reimbursement basis in the amount not to exceed \$800,000 and not to exceed **33% or \$264,000** per quarter for the first three quarters. A maximum of 75% of the total contract funds will be utilized to serve Out-of-School Youth, with 25% to be utilized to serve In-School-Youth Cost will be paid in accordance with the budget on any line item. Monthly accruals are due by the 10th day of the month and billing (with backup) is due by the 15th. Electronic format is preferred. A ten percent (10%) variance may occur between line items with approval from CSRC.

MODIFICATION OF TERMS: The terms of this Agreement, including total compensation, may be modified by mutual consent of both parties if enrollments, agreed-upon services, funding availability or circumstances warrant change. Refer to General Provisions and Assurances. Total budget amount cannot be exceeded. Budget line-item variances under 10% of line item do not require Board Staff approval. Budget line-item variances over 10% of line item require advance approval from CSRC’s Chief Financial Officer and CSRC staff assigned to manage the contract.

CONDITIONS OF PAYMENT/PERFORMANACE STANDARDS: It is understood and agreed by both CSRC and the Service Provider that payment is for cost associated with serving WIOA eligible youth as negotiated and outlined on the Project Budget.

PERFORMANCE MEASURES: The Service Provider will be required to meet the following performance guidelines as part of the contract requirements. These metrics are subject to change to align with performance goals negotiated with FloridaCommerce for Program Year 24-25, which have not yet been determined.

Performance Benchmark Measure	Timeframe Reporting
Measurable Skills Gains- 81%	Upon receipt from FloridaCommerce
Attainment of Degree or Certificate-89%	Upon receipt from FloridaCommerce
Median Earnings 2 nd Quarter After Exit - \$3300	Upon receipt from FloridaCommerce
Employment Rate – Second Quarter After Exit – 82%	Upon receipt from FloridaCommerce
Employment Rate – Fourth Quarter After Exit – 80%	Upon receipt from FloridaCommerce



1. **DEFINITIONS OF PERFORMANCE MEASURES:**

Note: for each definition below, The Service Provider's numbers for the purpose of this contract will be isolated from the numbers of other CareerSource Research Coast youth programs/projects.

A. ***Skills Gains:*** A minimum of 81% of all contracted enrolled WIOA youth receiving training services (occupational skills activities, secondary or post-secondary activities, or on-the-job training activities) will successfully engage in documented skills gains during each year of training related participation. Skills gains are defined as:

- **Training Milestone:** Evaluations completed by an employer or training provider documenting the achievement of established milestones on-the-job training period. Employer/training provider evaluations completed during job shadowing activities or work experience/internship activities cannot be utilized to document a training milestone measurable skills gain.
- **Skills Progression:** Documentation showing the successful completion of an exam required for an occupation, satisfactory attainment of an element or an industry or occupational competency exam or other completion test required to obtain a credential.
- **Attainment of a Secondary School Diploma or its Equivalent:** Documentation showing the participant earned a high school diploma or its state-recognized equivalent.
- **Educational Functioning Level:** Results from a pre and post CASAS exam or other literacy numeracy test approved by the National Reporting System (NRS) showing an increase of at least one functional level in reading and/or math.
- **Secondary or Post-Secondary Transcripts/Report Card:** Report card/transcripts for one semester showing the client is achieving academic standards. Secondary school credits or secondary school Carnegie credits may be accepted.
- Other approved WIOA related work preparation attainments, as defined and approved by CSRC.

B. ***Attainment of Degree or Certificate:*** Of all youth enrolled in a training program who exit, 89% will successfully attain an occupational skills credential/certification, post-Secondary credential/certification, High School Diploma/GED or a state, industry or nationally recognized credential. The measure will include total number of youth exited with credential divided by the total number of youth who received training services during program participation who have exited from the program each month. Data verified from EF report.

C. ***Internship Placement:*** The service provider will meet at a minimum of the 25% WEX expenditure. Young adults will career explore and job shadow and may participate in paid Internship activities.

Students will be paid \$15.00/hour. Hours scheduled will be based on the Work Experience duties and the individual participant needs and goals, for paid internship activities. Worker's Compensation coverage will fall under the State's blanket coverage for WIOA participants. Wages in excess of \$600 a year may result in issuance of IRS Form 1099 and have tax liability for participants. The Service provider will provide guidance and information regarding the possible tax responsibilities to participants and families.



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A minimum of 25% of regional allocation of WIOA Youth funds spent on a quarterly basis will be specific to approved and allowable Internship activities, within budget guidelines. This will include staff hours specific to Internship development, engagement, and execution; youth related payments and fees (incentives as described under the Internship placement/Job Shadowing section in the summary of Main Components and Intent, wages, and payroll fees) directly related to youth engagement in Internship activities.

- D. ***Internship Successful Completion:*** The youth must complete 90% of the scheduled Work Experience hours to complete successfully. Additionally, the internship may be considered successful if the internship ends due to direct hire employment with the internship site or an alternate employer for a higher wage. The data will be verified from Employ Florida reporting which contains the activities closed with codes 400 or 425 in conjunction with the hours worked summary from the internship tracker.
- E. ***Median Earnings Second Quarter After Exit:*** The median earnings of exited youth participants who are in unsubsidized employment during the second quarter after exit from the program will be \$3,300. Data will be verified from the FloridaCommerce Performance Indicator reports.
- F. ***Employment Rate 2nd Quarter After Exit:*** Of all youth who exit, 82% will be successfully enrolled in education or training activities, or in unsubsidized employment, during the second quarter after exit from the program. Data will be verified from the FloridaCommerce Performance Indicator reports.
- G. ***Employment Rate 4th Quarter After Exit:*** Of all youth who exit, 80% will be successfully enrolled in education or training activities, or in unsubsidized employment, during the fourth quarter after exit from the program. Data will be verified from the FloridaCommerce Performance Indicator reports.

The Service Provider will be paid according to the negotiated terms for expenditures related to these deliverables and as costs are incurred. The Service Provider is expected to make reasonable progress toward contract goals. Reasonable progress shall mean that, at the time of monitoring, activity, and outcomes are what they should be for the evaluation period.

Should it appear that reasonable progress is not being made, CSRC will require the Service Provider to implement corrective actions. If the problem is not corrected, this contract may be terminated. To receive payment, the Service Provider must submit invoices for allowable costs as outlined in the negotiated program budget. These total costs may not exceed an aggregate of \$800,000.

Invoices must reflect amounts paid and youth activities must be supported with attached copies of youth activities attendance sheets, pre and posttests, certificates, etc., as applicable to the activity. Documentation of costs must be maintained for monitoring and auditing by CSRC.

When invoices are received, CSRC staff will review them for accuracy and consistency with this Agreement. If the invoices are incomplete, lack documentation or are not in compliance with the Agreement, they will be returned to the Service Provider for correction. Reimbursement will not be made to the Service Provider until an acceptable invoice is received, verified, and processed.



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The Service Provider is responsible for maintaining accounting records related to this Agreement. These records will be audited by CSRC staff at the end of the Agreement. Any disallowed costs for which reimbursement has been made must be repaid by the Service Provider to CSRC within 30 days of written notification that a disallowed cost and reimbursement have occurred. Reimbursement cannot be made utilizing federal funds. Repayment must be in the form of a check for the amount owed. Costs may be disallowed if they are:

- Inconsistent with the goals and terms of this Agreement or WIOA law, or CSRC regulations; and/or
- Not traceable to an actual expense and participants from the designated target groups; and/or
- Not clearly documented with class rosters and payroll registers; and/or
- Incurred before the date of this Agreement.

Costs for personnel, travel, transportation, training, membership fees and youth activities must be listed separately on the invoice and the costs totaled. Copies of proper documentation of costs incurred must also be attached, i.e. payroll registers, cancelled checks, mileage, and training fees.

At no time will total payments exceed the total dollar amount specified in this Agreement.

The Service Provider must adhere to all WIOA, state, and CSRC policies and procedures related to procurement when securing goods or services for this agreement. Documentation of proper procurement must be maintained with each purchase and made available to federal, state and partnership monitors and auditors.

2. PERFORMANCE SANCTIONS:

CSRC may impose sanctions on the Service Provider depending on performance determined during monitoring and evaluation. Sanctions will be imposed if goals and objectives are not met. Sanctions may include immediate termination of the Agreement, a debarring of the Service Provider from future agreements or a reduction in enrollments. CSRC will determine the level of sanctions to be imposed.

3. METHOD AND TIME OF PAYMENT

The Service Provider will be mailed a check for the total allowable cost incurred upon receipt of proper, verified invoices.

Invoices will be paid promptly provided the invoice is correct, sufficient, that verifiable documentation is attached, and all costs are allowable based on the negotiated terms.

The last invoice must be submitted no later than July 15, 2025.

- ## **4. DEBLIGATION:**
- The Service Provider is expected to meet the goals and objectives specified in this Agreement and to provide those services contained in the Statement of Work. CSRC will monitor these items and will terminate this Agreement if the Service Provider fails to provide the requested services and performance. If this Agreement is terminated, the funds will be de-obligated and awarded to an alternate provider or retained by CSRC.



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ATTACHMENT E – NEGOTIATED BUDGET FOR 2024-2025 YOUTH ACTIVITIES

PROJECT BUDGET:

PY 24-25 WIOA Youth Budget Summary	
Staff Labor	\$ 383,664
Fringe Benefits	\$ 104,816
Travel: Mileage	\$ 4,175
Other Travel	\$ 2,317*
Employee Related	\$ 210
Supplies / Consumables	\$ 2,100**
Software Licensing	\$ 3,650
Communications	\$ 3,400
Insurance / Professional Fees	\$ 10,560
Client Related	\$ 193,508
Indirect Cost	\$ 91,600
TOTAL	\$ 800,000

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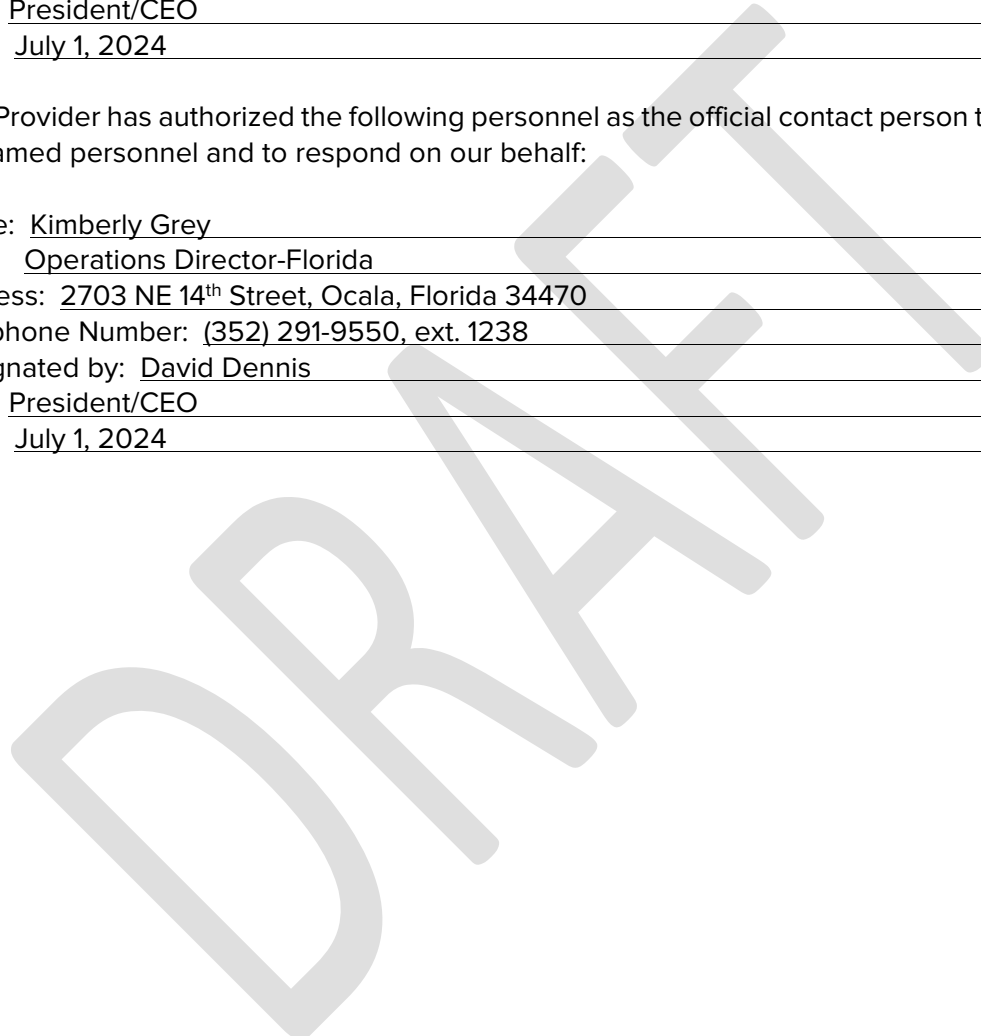
ATTACHMENT F – DESIGNATION OF CONTRACT PERSONNEL

CSRC has authorized the following personnel to administer this contract and give direction to the Service Provider:

Name: Kate Sayger
 Title: Program Performance Coordinator
 Address: 584 NW University Blvd., Suite 100, Port St. Lucie, FL 34986
 Telephone Number: (866) 482-4473 x. 526
 Designated by: Brian Bauer
 Title: President/CEO
 Date: July 1, 2024

The Service Provider has authorized the following personnel as the official contact person to accept direction from the above-named personnel and to respond on our behalf:

Name: Kimberly Grey
 Title: Operations Director-Florida
 Address: 2703 NE 14th Street, Ocala, Florida 34470
 Telephone Number: (352) 291-9550, ext. 1238
 Designated by: David Dennis
 Title: President/CEO
 Date: July 1, 2024





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ATTACHMENT G – SIGNATORY AUTHORITY FOR INVOICES

The following individual(s) has/have been delegated signatory authority for invoices submitted under Agreement. Original signatures are required on this document and the invoice.

A. _____
 Signature

 Printed Name & Title

B. _____
 Signature

 Printed Name & Title

C. _____
 Signature

 Printed Name & Title

It is suggested that more than one individual be delegated signatory authority.

Service Provider’s Federal Identification No: 59-2551416

Provide official mailing address below if different from that provided in the Agreement:

 Eckerd Connects, Inc.

 500 S. Gravers Road

 Plymouth Meeting, PA 19444



ATTACHMENT H – CERTIFICATIONS & ASSURANCES

This attachment is part of the Sub-Recipient agreement held between The Workforce Development Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast (CSRC) and Sub-Recipient for described in the Agreement attached hereto. In consideration of the mutual covenant and stipulations set forth in the contract and Attachment herein, the parties hereby agree as follows:

1. COMPLIANCE WITH POLICIES AND LAWS

The warranty of this Section specifically includes compliance by Sub-Recipient with the provisions of the Immigration Reform and Compliance Act of 1986 (P. L. 99-603), the Workforce Innovation and Opportunity Act (WIOA), the provisions of the Workforce Investment Act of 1998, the Workforce Innovation Act of 2000, 45 CFR 98, the Temporary Assistance for Needy Families Program (TANF), 45 CFR parts 260-265 and other applicable federal regulations and policies promulgated thereunder and other applicable State, Federal, criminal and civil law with respect to the alteration or falsification of records created in connection with this Agreement. Office of Management and Budget (OMB) Circulars: Sub-Recipient agrees that, if applicable, it shall comply with all applicable OMB circulars, such as 2 CFR 200. Sub-Recipient will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. 276a to 276a7), the Copeland Act (40 U.S.C. 276c and 18 U.S.C. 874, and the Contract Work Hours and Safety Standards Act (40.327-333), regarding labor standards for federally assisted construction sub agreements.

2. CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER MATTERS

Sub-Recipient certifies that it is not currently debarred, suspended, or excluded from or for participation in Federal assistance programs, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency within a three-year period preceding the effective date of the Agreement in accordance with 29 CFR Parts 45, 74, 95 and 98. No contract shall be awarded to parties listed on the GSA List of Parties Excluded from Federal Procurement or Non-Procurement Programs.

3. NON-DISCRIMINATION, EQUAL OPPORTUNITY ASSURANCES, CERTIFICATIONS, OTHER PROVISIONS

As a condition to the award of financial assistance from the Department of Labor under Title I of the WIOA, the grant applicant assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

- Section 188 of the Workforce Innovation & Opportunity Act (WIOA), which prohibits discrimination against all individuals in the United States based on race, color, religion, sex, national origin, age, disability, political affiliation, or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title I- Financially assisted program or activity.
- Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color, and national origin.
- Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities.
- The Age Discrimination Act of 1975, as amended, which prohibits discrimination based on age.
- Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs.
- Section 654 of the Omnibus Budget Reconciliation Act of 1981 prohibiting discrimination on the basis of race, creed, color, national origin, sex, handicap, political affiliation or beliefs.
- The American with Disabilities Act of 1990, P.L. 101-336 prohibiting discrimination in all employment practices, including the job application procedures, hiring, firing, advancement, compensation, training, and other terms, conditions, and privileges of employment. It applies to recruitment, advertising, tenure, layoff, leave, fringe benefits, and all other employment-related activities; and



The Sub-Recipient also assures that it will comply with 29 CFR Part 37 and all other regulation implementing the laws listed above.

For contracts more than \$10,000, the Sub-Recipient will comply with Executive Order 11246 of September 24, 1965, entitled "Equal Employment Opportunity" as amended by Executive Order 11375 of October 13, 1967, and supplemented on Department of Labor regulations at 41 CFR Chapter 60.

4. CERTIFICATION REGARDING CLEAN AIR ACT, WATER ACT, ENERGY EFFICIENCY AND ENVIRONMENTAL STANDARDS, SOLID WASTE

Clean Air and Water Act: When applicable, if this Contract is more than \$100,000, Sub-Recipient shall comply with all applicable standards, orders or regulations issued under the Clean Air Act as amended (42 U.S.C. 7401), Section 508 of the Clean Water Act as amended (33 U.S.C. 1368 et seq.), Executive Order 11738 and Environmental Protection Agency regulations (40 CFR Part 15). The Sub-Recipient shall report any violation of the above to the contract manager. Energy Efficiency: The Sub-Recipient shall comply with mandatory standards and policies relating to energy efficiency which are contained in the State of Florida's Energy Conservation Plan issued in compliance with the Energy Policy and Conservation Act (Public Law 94-163).

Sub-Recipient will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in flood plains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. 1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. 7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended, (P.L. 93-523); and (h) protection of endangered species under the Endangered Species Act of 1973, as amended, (P.L. 93-205). The Sub-Recipient will comply with the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act (42 U.S.C. 6962).

5. CERTIFICATION REGARDING LOBBYING AND INTEGRITY

Sub-Recipient shall comply with the provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352) 29 CFR Part 93. When applicable, if this Agreement is more than \$100,000, Sub-Recipient must, prior to contract execution, complete the Certification Regarding Lobbying Form.

6. CONFIDENTIALITY

It is understood that the Sub-Recipient shall maintain the confidentiality of any information, regarding CSRC customers and the immediate family of any applicant or customer, that identifies or may be used to identify them, and which may be obtained through application forms, interviews, tests, reports from public agencies or counselors, or any other source. Sub-Recipient shall not divulge such information without the written permission of the customer, except that such information which is necessary as determined by CSRC for purposes related to the performance or evaluation of the Agreement may be divulged to

CSRC or such other parties as they may designate having responsibilities under the Agreement for monitoring or evaluating the services and performances under the Agreement, or to governmental authorities to the extent necessary for the proper administration of the law. All release of information shall be in accordance with applicable State laws, and policies of the CSRC. No release of information by Sub-Recipient, if such release is required by Federal or State law, shall be construed as a breach of this Section.

7. RIGHTS TO DATA/COPYRIGHTS AND PATENTS

CSRC, State of Florida and the U.S. Department of Labor shall have unlimited rights to inventions made under contract or agreement: Contracts or agreements for the performance of experimental, developmental, or research work shall provide for the rights of the Federal Government and the recipient in any resulting invention in accordance with 37 CFR



part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements" and any implementing regulations issued by the awarding agency.

8. MONITORING

At any time and as often as CSRC, the State of Florida, United States Department of Labor, Comptroller General of the United States, the Inspector Generals of the United States and the State of Florida, or their designated agency or representative may deem necessary, Sub-Recipient shall make available all appropriate personnel for interviews and all financial, applicant, or participant books, documents, papers and records or other data relating to matters covered by this contract, for examination and/or audit, and/or for the making of excerpts or copies of such records for the purpose of auditing and monitoring activities and determining compliance with all applicable rules and regulations, and the provisions of this Agreement. The above referenced records shall be made available at the Sub-Recipient expense, at reasonable locations as determined by CSRC. Sub-Recipient shall respond in writing to monitoring reports and requests for corrective action plans within 10 working days after the receipt of such request from CSRC.

9. TERMINATION FOR DEFAULT/CONVENIENCE

This modified agreement may be terminated as follows:

- a. Either party may request termination of modified agreement upon 60 days prior written notice to the other party.
- b. CSRC may unilaterally terminate or modify this modified agreement, if for any reason either the U.S. Department of Labor or the State of Florida reduces funding through the grants under which this modified agreement is funded.
- c. CSRC may unilaterally terminate this modified agreement at any time that it is determined that:
 - i. Sub-Recipient fails to provide any of the services it has contracted to provide; or
 - ii. Sub-Recipient fails to comply with the provisions of this modified agreement; or
 - iii. Such termination is in the best interest of CSRC.
- d. Written notification of termination must be by registered mail, return receipt requested.

If Sub-Recipient disagrees with the reasons for termination, they may file a grievance in writing within ten days of notice of termination to the CSRC Executive Committee, who will conduct a grievance hearing and decide, from evidence presented by both parties, the validity of termination.

In the event this modified agreement is terminated for cause, Sub-Recipient shall be liable to CSRC for damages sustained for any breach of this modified agreement by the Sub-Recipient, including court costs and attorney fees, when cause is attributable to the Sub-Recipient.

In instances where Sub-Recipient violates or breaches modified agreement terms, CSRC will use all administrative, contractual, or legal remedies that are allowed by law to provide for such sanctions and penalties as may be appropriate.

10. PUBLIC ANNOUNCEMENTS AND ADVERTISING

Sub-Recipient agrees that when issuing statements, press releases, request for proposals, bid solicitation, and other documents describing the project or programs funded in whole or in part under this Agreement, Sub-Recipient shall clearly state: (1) the percentage of the total cost of the program or project which will be financed with Federal money under this Agreement and (2) the dollar amount of Federal funds for the project or program.

11. PUBLIC ENTITY CRIMES

Sub-Recipient shall comply with subsection 287.133(2)(a), F.S., whereby a person or affiliate who has been placed on the convicted Lessor list following a conviction for a public entity crime may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a Lessor, supplier, sub-Lessor or consultant under a contract with any public entity and may not transact business with any public entity in excess of the threshold amount provided in section 287.07, F.S., for Category Two for a period of thirty-six (36) months from the date of being placed on the convicted Lessor list.



12. THE PRO-CHILDREN ACT

Sub-Recipient agrees to comply with the Pro-Children Act of 1994, 20 U.S.C. 6083. Failure to comply with the provisions of the law may result in the imposition of civil monetary penalty up to \$1,000 for each violation and/or the imposition of an administrative compliance order on the responsible entity. This clause is applicable to all approved sub-contracts. In compliance with Public Law (Pub. L.) LO3-277, the Contract shall not permit smoking in any portion of any indoor facility used for the provision of federally funded services including health, day care, early childhood development, education, or library services on a routine or regular basis, to children up to age 18.

13. PROCUREMENT OF RECOVERED MATERIALS

Sub-Recipient agrees to comply with the provisions of section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act, and as supplemented by 2 CFR Appendix II to part 200 and 2 CFR part 200.323 and the requirements stated therein.

14. DOMESTIC PREFERENCES FOR PROCUREMENTS

Sub-Recipient agrees to comply with the provisions of 2 CFR Appendix II to part 200 and 2 CFR part 200.322 and the requirements stated therein.

15. PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT

Sub-Recipient agrees to comply with the provisions of 2 CFR Appendix II to part 200 and 2 CFR part 200.216 and the requirements stated therein. See [Public Law 115-232](#), section 889 for additional information and 2 CFR part 200.471.

16. E-VERIFY

Sub-Recipient warrants and represents that it complies with section 448.095, F.S., where the State of Florida expressly requires the following:

- i. Every public employer, contractor, and subcontractor shall register with and use the E-Verify system to verify the work authorization status of all newly hired employees. A public employer, contractor, or subcontractor may not enter into a contract unless each party to the contract registers with and uses the E-Verify system.
- ii. A private employer shall, after making an offer of employment which has been accepted by a person, verify such person's employment eligibility. A private employer is not required to verify the employment eligibility of a continuing employee hired before January 1, 2021. However, if a person is a contract employee retained by a private employer, the private employer must verify the employee's employment eligibility upon the renewal or extension of his or her contract. As of July 1, 2023, all private employers in Florida with 25 or more employees will be required to use E-Verify, the federal government's database for verifying work authorization.

17. FREE SPEECH AND RELIGIOUS LIBERTY (APPLICABLE TO SUB-RECIPIENTS ONLY)

Sub-Recipient agrees to follow the statutory and national policy requirements, as applicable, stated in 2 CFR § 200.300 and Executive Order 13798 Promoting Free Speech and Religious Liberty and Executive Order 13864 Improving Free Inquiry, Transparency and Accountability at College and Universities.

18. HATCH ACT (APPLICABLE TO SUB-RECIPIENTS ONLY)

The Sub-Recipient will comply with the provisions of the HATCH ACT, 5 U.S.C. 1501-1508 and 7328 which limit the political activities of employees whose principal employment activities are funded in whole or part with Federal funds.



19. ETA SALARY LIMITATION (APPLICABLE TO SUB-RECIPIENTS ONLY)

Sub-Recipient certifies that is in compliance with Public Law 109-234, and that none of the funds appropriated in Public Law 109-149 or prior Acts under the heading "Employment and Training" that are available for expenditures on or after May 1, 2012, shall be used by a recipient or sub-recipient of such funds to pay the salary and bonuses of an individual, either as direct costs or indirect costs, at a rate in excess of Executive Level II, except as provided for under Section 101 of Public Law 109-149. This limitation shall not apply to Sub-Recipients providing goods and services as defined in 2 CFR200.

20. TRAFFICKING VICTIMS PROTECTION ACT (APPLICABLE TO SUB-RECIPIENTS ONLY)

The Sub-Recipient will comply with the Trafficking Victims Protection Act of 200 (2 CFR 175).

21. VETERAN'S PRIORITY OF SERVICE (APPLICABLE TO SUB-RECIPIENTS ONLY)

The Sub-Recipient agrees to comply with the Veteran's Priority of Service Provisions (38 U.S.C. 4215 and 20 CFR 1010).

22. EQUAL TREATMENT FOR FAITH-BASED ORGANIZATIONS (APPLICABLE TO SUB-RECIPIENTS ONLY)

The Sub-Recipient will comply with 29 CFR 2, Subpart D which prohibits any State or local government receiving funds under any Department of Labor program, or any intermediate organization with the same duties as a governmental entity, from discriminating for or against an organization on the basis of the organization's religious character or affiliation. Prohibits religious organizations from engaging in inherently religious activities, such as worship, religious instruction, or proselytization, as part of the programs or services funded with direct financial assistance. Prohibits an organization that participates in programs funded by direct financial assistance from the Department of Labor, in providing services, from discriminating against a program beneficiary or prospective program beneficiary based on religion or religious belief. Any restrictions on the use of grant funds shall apply equally to religious and non-religious organizations.

Service Provider Name: _____

Authorized Representative

Printed Name & Title: _____

Authorized Representative

Signed Name & Title: _____ Date: _____



ATTACHMENT I - SWORN STATEMENT PURSUANT TO SECTION 287.133 (3) (a), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to: The Workforce Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast

by _____
 (print individual's name and title)

for _____
 (print name of entity submitting sworn statement)

whose business address is _____

and (if applicable) its Federal Employer Identification Number is _____ if the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement.)

2. I understand that a "public entity crime" as defined in Paragraph 287.133 (1) (g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133 (1) (b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that an "affiliate" as defined in Paragraph 287.133 (1) (a), Florida Statutes, means:

- a. A predecessor or successor of a person convicted of a public entity crime; or
- b. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5. I understand that a "person" as defined in Paragraph 287.133 (1) (e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.



6. Based on information and belief, the applicable statement which I have marked below is true in relation to the entity submitting this sworn statement.

- Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.
- The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.
- The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989; however, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted Service Provider list. Attached is a copy of the final order.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED, OR THROUGH THE END OF THE CONTRACT FOR WHICH IT IS BEING SIGNED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

Signature: _____

Date: _____

NOTARY PUBLIC

STATE OF _____ COUNTY OF _____

PERSONALLY APPEARED BEFORE ME, the undersigned authority, _____
 (name of individual signing)

who, after first being sworn by me, affixed his/her signature in the space provided above on

this _____ day of _____, _____.

My commission expires: _____



ATTACHMENT J - CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS

1. The Service Provider certifies to the best of its knowledge and belief, that it and its principal:
 - A. Are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any federal department or agency.
 - B. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction, violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statement, or receiving stolen property;
 - C. Are not presently indicated for or otherwise criminally or civilly charged by a government entity (federal, state, or local) with commission of any of the offenses enumerated in paragraph (1)(B) of this certification; and
 - D. Have not within a three-year period preceding this application/proposal/contract had one or more public transactions (federal, state, or local) terminated for cause or default.
2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall submit an explanation to CSRC.

Service Provider

Name and Title of Certifying Representative

Signature of Certifying Representative

Date



ATTACHMENT K - BYRD ANTI-LOBBYING CERTIFICATE

Certification for Contracts, Grants, Loans, and Cooperative Agreements (to be submitted with each bid or offer exceeding \$100,000)

APPLICABLE TO THIS CONTRACT: Yes: No:

The undersigned Service Provider certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for making lobbying contacts to an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form--LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions as amended by "Government wide Guidance for New Restrictions on Lobbying," 61 Fed. Reg. 1413 (1/19/96).

(3) The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by 31, U.S.C. § 1352 (as amended by the Lobbying Disclosure Act of 1995). Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Pursuant to 31 U.S.C. § 1352(c)(1)-(2)(A), any person who makes a prohibited expenditure or fails to file or amend a required certification or disclosure form shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such expenditure or failure.

The Service Provider, **Eckerd Connects, Inc.**, certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Service Provider understands and agrees that the provisions of 31 U.S.C. A 3801, *et seq.*, apply to this certification and disclosure.

Name and Title of Certifying Representative

Signature of Certifying Representative

Date



ATTACHMENT L - NONDISCRIMINATION AND EQUAL OPPORTUNITY PROVISIONS ASSURANCE STATEMENT

As a condition to the award of financial assistance from the Department of Labor under Title I of the WIOA, the grant applicant assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

- Section 188 of the Workforce Innovation & Opportunity Act (WIOA), Which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title I- Financially assisted program or activity;
- Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination based on race, color, and national origin.
- Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities.
- The Age Discrimination Act of 1975, as amended, which prohibits discrimination based on age.
- Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination based on sex in educational programs.
- Section 654 of the Omnibus Budget Reconciliation Act of 1981 prohibiting discrimination based on race, creed, color, national origin, sex, handicap, political affiliation, or beliefs.
- The Americans with Disabilities Act of 1990, P.L. 101-336 prohibits discrimination in all employment practices, including the job application procedures, hiring, firing, advancement, compensation, training, and other terms, conditions, and privileges of employment. It applies to recruitment, advertising, tenure, layoff, leave, fringe benefits, and all other employment-related activities; and

The Service Provider also assures that it will comply with 29 CFR Part 37 and all other regulations implementing the laws listed above.

For construction contracts in excess of \$10,000, the Service Provider will comply with Executive Order 11246 of September 24, 1965, entitled "Equal Employment Opportunity" as amended by Executive Order 11375 of October 13, 1967, and supplemented on Department of Labor regulations at 41 CFR Chapter 60.

Failure to comply with these provisions may result in termination of any contract or agreement with CSRC.

I certify that I have read the above statement and on behalf of **Eckerd Connects, Inc.** agree to comply fully with the provisions contained therein.

Name and Title of Certifying Representative

Signature of Certifying Representative

Date



ATTACHMENT M - DRUG-FREE WORKPLACE REQUIREMENT CERTIFICATION

Pursuant to the Drug-Free Workplace Act of 1988, and its implementing regulations codified at 29 CRF 98, Subpart

F, I _____ the undersigned, in representation of **Eckerd Connects, Inc.**, attest and certify that the grantee will provide a drug-free workplace by:

1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the grantee's workplace and specifying the actions that will be taken against employees for violation of such prohibition.
2. Establishing an ongoing drug-free awareness program to inform employees about:
 - (a) The dangers of drug abuse in the workplace.
 - (b) The grantee's policy of maintaining a drug-free workplace.
 - (c) Any available drug counseling, rehabilitation, and employee assistance programs; and
 - (d) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.
3. Making it a requirement that each employee engaged in the performance of the grant be given a copy of the statement required by paragraph (1).
4. Notifying the employee in the statement required by paragraph (1) that, as a condition of employment under the grant, the employee will:
 - (a) Abide by the terms of the statement; and
 - (b) Notifying the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction.
5. Notifying the agency in writing ten calendar days after receiving notice under subparagraph (4)(b) from an employee or otherwise receiving actual notice of such conviction. We will provide such notice of convicted employees, including position title, to every grant officer on whose grant activity the convicted employee was working. The notice shall include the identification number(s) of each affected grant.
6. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph 4(b), with respect to any employee who is so convicted:
 - (a) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973 as amended; or
 - (b) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local, health, law enforcement, or other appropriate agency.
7. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs (1), (2), (3), (4), (5), and (6).
8. Notwithstanding, it is not required to provide the workplace address under the grant. As of today, the specific sites are known and we have decided to provide the specific addresses with the understanding that if any of the identified places change during the performance of the grant, we will inform the agency of the changes.



The following are the sites for the performance of work done in connection with the specific grant, including street address, city, county, state, and zip code:

Check () if there are workplaces on file that are not identified here.

Check () if an additional page was required for the listing of the workplaces.

I declare, under penalty of perjury under the laws of the United States, and under the penalties set forth by the Drug-Free Workplace Act of 1988, that this certification is true and correct.

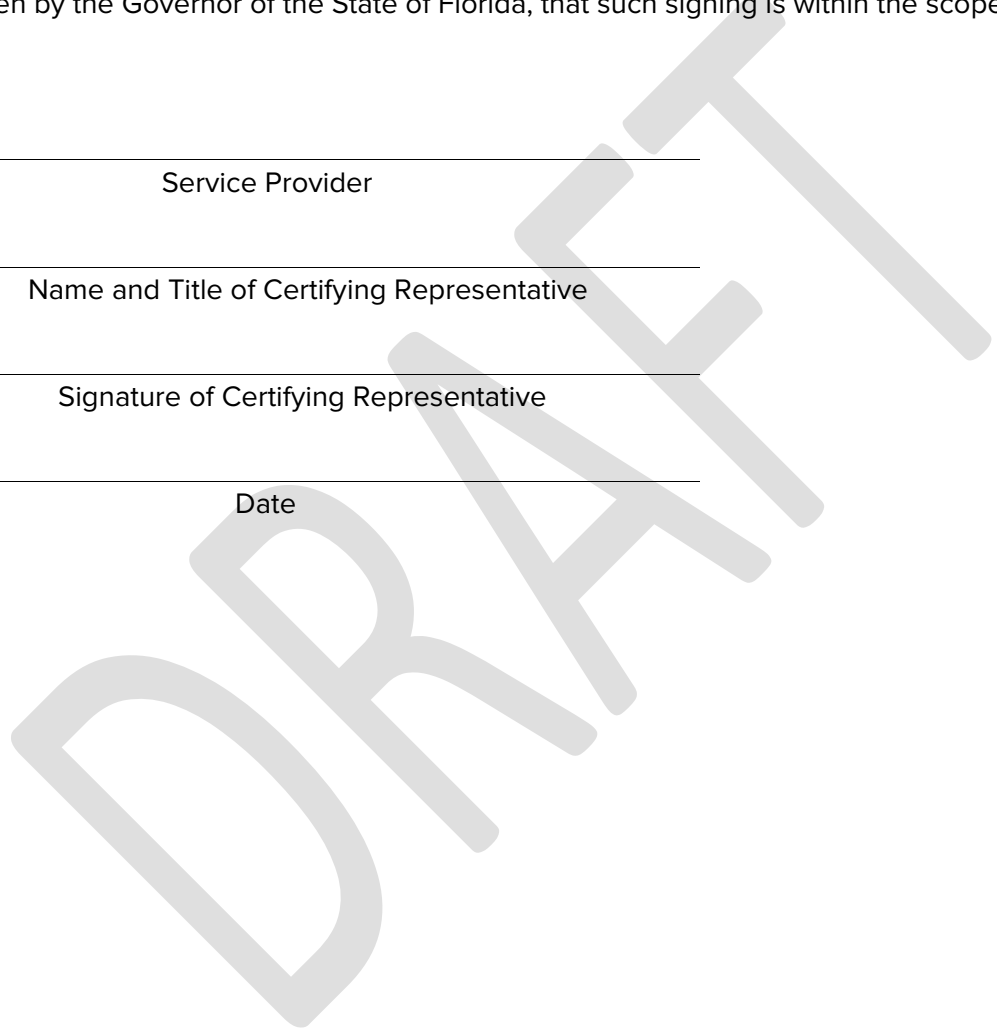
I certify that I, who sign this Drug-Free Workplace Certification on behalf of the Service Provider, do so by the authority given by the Governor of the State of Florida, that such signing is within the scope of my powers.

Service Provider

Name and Title of Certifying Representative

Signature of Certifying Representative

Date





ATTACHMENT N - CERTIFICATION REGARDING SCRUTINIZED COMPANIES

Section 287.135(2)(a), Florida Statutes, prohibits a company from bidding on, submitting a proposal for, or entering into or renewing a contract for goods or services of any amount if, at the time of contracting or renewal, the company is on the Scrutinized Companies that Boycott Israel List, created pursuant to section 215.4725, Florida Statutes, or is engaged in a boycott of Israel. Section 287.135(2)(b), Florida Statutes, further prohibits a company from bidding on, submitting a proposal for, or entering into or renewing a contract for goods or services over one million dollars (\$1,000,000) if, at the time of contracting or renewal, the company is on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, both created pursuant to section 215.473, Florida Statutes or the company is engaged in business operations in Cuba or Syria.

As the person authorized to sign on behalf of _____,

I hereby certify that the statement selected below is true: Service Provider

The Service Provider

- i. Is not engaged in a boycott of Israel **and**
- ii. Is not on the Scrutinized Companies that Boycott Israel List **and**
- iii. Is not on the Scrutinized Companies with Activities in Sudan List **and**
- iv. Is not on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List **and**
- v. Has not engaged in business operations in Cuba or Syria.

The Service Provider meets the conditions for exemption as provided in section 287.135(4), Florida Statutes.

I understand that pursuant to section 287.135, Florida Statutes, the submission of a false certification may subject the company to civil penalties, attorney’s fees, and/or costs. I further understand that any contract with Workforce Development Board of the Treasure Coast d/b/a CareerSource Research for goods or services of any amount may be terminated if the Service Provider is found to have submitted a false certification may subject the company to civil penalties, attorney's fees, and/or costs. I further understand that any contract for goods or services may be terminated if the Service Provider is found to have submitted a false certification or has been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List or been engaged in business operations in Cuba or Syria.

 Name and Title of Certifying Representative

 Signature of Certifying Representative

 Date

**ATTACHMENT O – LOCAL DEFINITION FOR YOUTH REQUIRING ADDITIONAL ASSISTANCE TO COMPLETE AN EDUCATION PROGRAM OR TO SECURE AND HOLD EMPLOYMENT**

LWDB 20 defines "A low- income individual who requires additional assistance to enter or complete an educational program or to secure or hold employment" as a youth that meets Federal guidelines for low income and also meets one or more of the following criteria:

1. Youth that have one or more biological parent incarcerated, institutionalized, or sentenced by a court of law to incarceration/institutionalization for more than one year. Documentation must be provided by court, institution, or the Department of Corrections.
2. Youth that have been victims of domestic violence or intimate partner violence as documented by law enforcement or domestic violence organization.
3. Youth that are documented gang members as defined and documented by local law enforcement.
4. Youth that are residing in a high poverty area as defined by census tract records showing area of youth's residence as having a poverty rate of 25% or greater.
5. Youth that are over age 21 and have no work history or have poor work history as defined by the lack of employment for more than 180 consecutive days as documented by employer records, pay records, or State system (Suntax).
6. Youth at risk of dropping out of high school due to grades/credits/ attendance/not passing proficiency exams or has had an out-of-school suspension or expulsion from school.
7. Is attending an alternative school/education program or has been enrolled in an alternative school within the past 12 months.

In accordance with WIOA guidelines, ISY youth applying for the WIOA youth program as a "youth requiring additional assistance" must also meet income guidelines for WIOA enrollment. CareerSource Research Coast utilizes federal/state/local agency documentation sources as validation of the "youth requiring additional assistance" barrier whenever possible but may accept an applicant statement/self-attestation in extenuating circumstances.

AGENDA ITEM SUMMARY

Title	Local Targeted Occupations List (LTOL) for 2nd Quarter of PY 2024-2025
Strategic Goal	Strong Advancement of Existing and Emerging Local Targeted Industry Clusters
Policy/Plan/Law	Workforce Innovation & Opportunity Act
Action Required	Review and Approve the LTOL for the 2nd Quarter of PY 2024-2025
Background	<p>The Department of Commerce (FLORIDACOMMERCE) Bureau of Labor Market Statistics (LMS) has published the 2024-2025 Statewide Targeted Occupations List on the DEO website. The Statewide Demand Occupations list identifies the labor market needs of Florida's business community and encourages job training based on those needs, with emphasis on jobs that are both high demand and high skill/high wage, and is used as a baseline for establishing the Local Targeted Occupations Lists (LTOLs). The Local Workforce Development Boards (LWDBs) develop and use their LTOLs to identify occupations for which eligible adults and dislocated workers may receive training assistance under the Workforce Innovation and Opportunity Act.</p> <p>Pursuant to CareerSource Florida policy, LWDBs are to develop their LTOLs, in consultation with local business and industry representatives, using the LMS-generated Demand Occupations Lists, as well as other resources, such as Help Wanted Online Lists and Supply/Demand lists. The LWDBs must publish their updated LTOLs on their websites and update them as they make changes. CareerSource Research Coast adopted a local policy to incorporate CareerSource Florida's LTOL policy and process. As part of our local policy, the LTOL is to be reviewed and approved on a quarterly basis in order to add occupations in demand or delete occupations that are declining.</p>
Staff Recommendation	Staff reviewed local labor market information and resources regarding the LTOL. There are no recommended addition of occupations to the 2nd Quarter of PY 2024-2025 list. Staff recommends approval of this LTOL for the 2nd Quarter of PY 2024-2025.
Supporting Materials	CareerSource Research Coast Local Targeted Occupations List
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

2024-2025 Local Targeted Occupations List

Sorted by Occupational Title

Workforce Development Area 20 - Indian River, Martin, and St. Lucie counties

Selection Criteria:

- 1 LMEC Educational Requirements:1 (No formal educational requirement) 2 (HS Diploma or Equivalent) 3 (Some College, No Degree), 4 (Postsecondary Non-Degree Award), 5 (Associate Degree), or 6 (Bachelor's Degree), or 7 (Master's Degree)
- 2 30 annual openings and positive growth
- 3 Mean Wage of \$17.27/hour and Entry Wage of \$14.04/hour
- 4 High Skill/High Wage (HSHW) Occupations:
Mean Wage of \$27.05/hour and Entry Wage of \$17.27/hour

SOC Code*	HSHW**	Occupation Title*	Regional				Statewide				LMEC Code	In Industry?	Qualifying Level***
			% Growth	Annual Openings	2022 Hourly Wage		% Growth	Annual Openings	2022 Hourly Wage				
					Mean	Entry			Mean	Entry			
132011	HSHW	Accountants and Auditors	1.49	171	37.56	21.81	1.24	9923	38.56	22.98	6	Yes	R
113012	HSHW	Administrative Services Managers	1.14	26	46.63	23.49	1.17	1219	51.93	27.36	6	Yes	S
493011	HSHW	Aircraft Mechanics and Service Technicians	N/A	N/A	26.09	17.63	0.63	1421	33.70	21.70	5	Yes	S
512011		Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	N/A	N/A	N/A	N/A	N/A	N/A	15.90	22.63	4	Yes	R
532011	HSHW	Airline Pilots, Copilots, and Flight Engineers	N/A	N/A	N/A	N/A	0.65	1102	130.16	62.00	6	Yes	N
171011	HSHW	Architects, Except Landscape and Naval	N/A	N/A	47.43	21.16	1.62	603	43.25	22.19	6	Yes	S
173011	HSHW	Architectural and Civil Drafters	N/A	N/A	25.22	19.11	1.21	1027	28.20	20.24	5	Yes	S
119041	HSHW	Architectural and Engineering Managers	0.56	9	72.79	49.72	1.22	647	75.05	50.13	6	Yes	S
271011	HSHW	Art Directors	N/A	N/A	37.22	26.77	1.11	719	42.68	25.77	6	No	S
274011		Audio and Video Technicians	N/A	N/A	25.79	17.09	1.37	638	24.06	14.65	5	No	S
493021		Automotive Body and Related Repairers	3.00	17	25.95	18.69	N/A	N/A	N/A	N/A	3	Yes	R
493023		Automotive Service Technicians and Mechanics	0.66	198	23.34	15.06	0.85	6099	22.74	14.70	4	No	R
194021		Biological Technicians	N/A	N/A	25.99	16.96	1.60	345	20.83	15.04	6	Yes	N
433031		Bookkeeping, Accounting, and Auditing Clerks	0.27	334	21.70	14.53	0.21	14342	21.82	15.24	3	Yes	R
472021		Brickmasons and Blockmasons	1.00	11	21.80	16.77	N/A	N/A	N/A	N/A	2	Yes	R
493031		Bus and Truck Mechanics and Diesel Engine Specialists	1.01	32	26.66	19.58	0.85	1517	26.57	19.01	4	Yes	R
533051		Bus Drivers, School or Special Client	0.72	86	20.24	16.22	N/A	N/A	N/A	N/A	2	Yes	R
533052		Bus Drivers, Transit and Intercity	1.51	31	20.24	16.22	N/A	N/A	N/A	N/A	2	Yes	R
131199	HSHW	Business Operations Specialists, All Other	1.39	115	32.63	18.12	1.28	9267	34.51	19.10	6	Yes	R
251011	HSHW	Business Teachers, Postsecondary	2.28	80	28.07	20.15	N/A	N/A	N/A	N/A	7	Yes	R
131028	HSHW	Buyers and Purchasing Agents	0.59	48	30.43	18.85	N/A	N/A	N/A	N/A	6	No	R
535021		Captains, Mates, and Pilots of Water Vessels	1.88	15	30.97	16.62	N/A	N/A	N/A	N/A	4	No	R
292031	HSHW	Cardiovascular Technologists and Technicians	2.31	10	32.65	20.53	N/A	N/A	N/A	N/A	5	Yes	R
251194	HSHW	Career/Technical Education Teachers, Postsecondary	2.00	80	28.07	20.15	N/A	N/A	N/A	N/A	7	No	R
252032	HSHW	Career/Technical Education Teachers, Secondary School	N/A	N/A	29.60	21.84	1.11	683	30.12	22.94	6	No	S
435011		Cargo and Freight Agents	1.10	4	26.92	N/A	N/A	N/A	N/A	N/A	2	Yes	R
472031		Carpenters	0.73	244	21.27	16.4	0.78	7191	22.18	16.66	4	No	R
472051		Cement Masons and Concrete Finishers	1.30	38	20.24	16.88	N/A	N/A	N/A	N/A	1	Yes	R
351011	HSHW	Chefs and Head Cooks	1.14	58	28.66	17.7	1.38	2259	28.30	17.01	5	No	R
194031		Chemical Technicians	N/A	N/A	24.12	16.21	1.15	231	24.68	16.53	5	Yes	N
192031	HSHW	Chemists	N/A	N/A	39.26	22.01	1.37	225	35.72	22.03	6	Yes	N
211021		Child, Family, and School Social Workers	1.13	54	22.53	15.92	1.49	1557	23.99	16.89	6	No	R
172051	HSHW	Civil Engineers	N/A	N/A	47.70	26.77	1.69	1587	48.51	28.23	6	Yes	S
131031	HSHW	Claims Adjusters, Examiners, and Investigators	N/A	N/A	32.20	20	0.70	2600	32.82	21.85	3	Yes	S
212011		Clergy	3.22	11	26.17	16.17	N/A	N/A	N/A	N/A	7	No	R
292010		Clinical Laboratory Technologists and Technicians	0.59	42	25.72	16.88	1.03	2173	26.67	16.45	5	No	R
532012	HSHW	Commercial Pilots	N/A	N/A	61.15	29.89	0.42	906	63.28	29.02	4	Yes	N
211099		Community and Social Service Specialists, All Other	0.78	15	23.28	14.86	1.15	560	27.33	13.97	6	No	N
211094		Community Health Workers	N/A	N/A	20.69	15.03	2.24	244	22.94	15.64	6	No	N
131141	HSHW	Compensation, Benefits, and Job Analysis Specialists	N/A	N/A	30.60	20.89	1.17	507	33.73	21.07	6	Yes	S
131041	HSHW	Compliance Officers	1.18	42	31.25	18.15	1.06	2645	33.80	19.60	6	Yes	R
113021	HSHW	Computer and Information Systems Managers	N/A	N/A	68.81	43.01	2.32	2739	75.87	48.84	6	Yes	S
151241	HSHW	Computer Network Architects	N/A	N/A	48.56	29.87	0.82	519	55.54	34.59	6	Yes	N
151231	HSHW	Computer Network Support Specialists	0.37	14	36.48	22.41	1.36	1158	35.91	22.33	5	Yes	S
519161		Computer Numerically Controlled Tool Operators	3.00	14	24.19	17.92	N/A	N/A	N/A	N/A	4	No	R
151299	HSHW	Computer Occupations, All Other	N/A	N/A	39.14	19.64	1.70	1243	44.13	21.42	6	Yes	S
151211	HSHW	Computer Systems Analysts	1.65	22	45.45	26.8	1.53	2514	48.53	29.35	6	Yes	S
151232	HSHW	Computer User Support Specialists	1.37	61	27.46	18.22	1.36	4681	27.28	17.44	4	Yes	R
474011	HSHW	Construction and Building Inspectors	-0.06	25	29.54	21.05	0.62	1426	30.31	21.06	4	Yes	S
119021	HSHW	Construction Managers	1.49	89	56.79	31.83	1.16	3581	56.93	31.37	6	No	R
352014		Cooks, Restaurants	N/A	N/A	N/A	N/A	N/A	N/A	13.09	16	2	No	R
131051	HSHW	Cost Estimators	N/A	N/A	31.57	19.24	0.50	1382	32.49	19.41	6	Yes	S
434031		Court, Municipal, and License Clerks	0.68	39	18.91	16.04	0.51	958	20.51	16.19	3	No	R
152051	HSHW	Data Scientists	N/A	N/A	48.21	28.83	4.23	692	48.45	29.07	6	Yes	S
151242	HSHW	Database Administrators	2.00	3	48.41	28.83	N/A	N/A	N/A	N/A	6	No	R
151243		Database Architects	3.00	1	53.14	N/A	N/A	N/A	N/A	N/A	6	No	R
319091		Dental Assistants	1.54	111	21.14	17.7	1.96	4112	20.51	16.93	4	No	R
291292	HSHW	Dental Hygienists	1.58	38	34.65	27.08	1.98	1114	36.59	30.68	5	No	R
292032	HSHW	Diagnostic Medical Sonographers	N/A	N/A	34.20	28.08	2.08	519	35.63	28.81	5	No	S
212021		Directors, Religious Activities and Education	N/A	N/A	25.10	14.37	1.05	1309	25.93	14.86	6	No	S
472081		Drywall and Ceiling Tile Installers	2.93	18	20.26	12.87	N/A	N/A	N/A	N/A	1	Yes	R

2024-2025 Local Targeted Occupations List

Sorted by Occupational Title

Workforce Development Area 20 - Indian River, Martin, and St. Lucie counties

Selection Criteria:

- 1 LMEC Educational Requirements:1 (No formal educational requirement) 2 (HS Diploma or Equivalent) 3 (Some College, No Degree), 4 (Postsecondary Non-Degree Award), 5 (Associate Degree), or 6 (Bachelor's Degree), or 7 (Master's Degree)
- 2 30 annual openings and positive growth
- 3 Mean Wage of \$17.27/hour and Entry Wage of \$14.04/hour
- 4 High Skill/High Wage (HSHW) Occupations:
Mean Wage of \$27.05/hour and Entry Wage of \$17.27/hour

SOC Code*	HSHW**	Occupation Title*	Regional				Statewide				LMEC Training Code	In Targeted Industry?	Qualifying Level***
			Annual % Growth	Annual Openings	2022 Hourly Wage		Annual % Growth	Annual Openings	2022 Hourly Wage				
					Mean	Entry			Mean	Entry			
119032	HSHW	Education Administrators, Kindergarten through Secondary	1.00	29	43.34	30.11	N/A	N/A	N/A	N/A	7	No	R
119033	HSHW	Education Administrators, Postsecondary	1.51	9	44.84	29.02	N/A	N/A	N/A	N/A	7	No	R
173023	HSHW	Electrical and Electronic Engineering Technologists and Technicians	1.00	7	28.75	20.44	N/A	N/A	N/A	N/A	7	Yes	R
172071	HSHW	Electrical Engineers	N/A	N/A	46.74	31.16	1.29	611	48.39	30.84	6	Yes	S
499051	HSHW	Electrical Power-Line Installers and Repairers	N/A	N/A	31.80	20.35	0.75	750	34.56	21.66	4	Yes	N
472111	HSHW	Electricians	2.47	169	24.05	18.21	1.27	5775	24.38	18.36	4	No	R
172072	HSHW	Electronics Engineers, Except Computer	N/A	N/A	46.49	36.7	1.33	476	51.14	36.71	6	Yes	N
252021	HSHW	Elementary School Teachers, Except Special Education	0.63	164	28.57	21	1.14	5605	28.48	21.46	6	No	R
173029	HSHW	Engineering Technologists and Technicians, Except Drafters, All Other	N/A	N/A	24.52	16.66	0.86	306	32.92	18.59	5	Yes	N
172199	HSHW	Engineers, All Other	N/A	N/A	42.08	24.01	0.88	782	47.34	26.68	6	Yes	N
119072	HSHW	Entertainment and Recreation Managers, Except Gambling	2.00	8	51.56	30.91	N/A	N/A	N/A	N/A	3	No	R
192041	HSHW	Environmental Scientists and Specialists, Including Health	1.37	16	28.14	17.73	0.84	569	30.49	18.41	6	Yes	N
113013	HSHW	Facilities Managers	1.03	12	53.35	29.37	1.08	578	46.93	26.81	6	No	S
119013	HSHW	Farmers, Ranchers, and Other Agricultural Managers	N/A	N/A	46.16	18.06	0.33	5386	42.70	18.40	6	No	S
512051	HSHW	Fiberglass Laminators and Fabricators	3.00	49	19.11	16.2	N/A	N/A	N/A	N/A	2	Yes	R
132051	HSHW	Financial and Investment Analysts	N/A	N/A	40.57	25.85	1.32	1438	43.85	27.03	6	Yes	S
132061	HSHW	Financial Examiners	N/A	N/A	49.15	30.69	2.79	322	37.75	22.68	6	No	N
113031	HSHW	Financial Managers	1.71	55	71.46	37	2.26	4186	75.86	39.24	6	Yes	R
132099	HSHW	Financial Specialists, All Other	1.97	13	28.96	17.19	1.25	1036	31.28	18.00	6	Yes	S
332011	HSHW	Firefighters	0.69	82	29.15	18.67	0.54	1882	27.19	17.40	4	No	R
471011	HSHW	First-Line Supervisors of Construction Trades and Extraction Workers	1.16	178	31.29	20.95	1.05	6574	33.36	22.57	3	No	R
391014	HSHW	First-Line Supervisors of Entertainment and Recreation Workers, Except Gambling Services	N/A	N/A	24.97	16.32	1.11	1563	25.01	15.54	3	No	S
371011	HSHW	First-Line Supervisors of Housekeeping and Janitorial Workers	2.19	39	23.45	17.02	N/A	N/A	N/A	N/A	2	No	R
371012	HSHW	First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers	1.11	100	24.95	17.35	1.04	2142	25.27	17.26	3	No	R
491011	HSHW	First-Line Supervisors of Mechanics, Installers, and Repairers	1.23	106	32.65	20.6	0.97	4137	32.98	21.77	3	No	R
411012	HSHW	First-Line Supervisors of Non-Retail Sales Workers	0.37	55	44.63	24.4	0.43	4018	46.01	24.61	3	Yes	R
431011	HSHW	First-Line Supervisors of Office and Administrative Support Workers	N/A	N/A	29.98	19.36	0.43	13271	30.64	19.69	3	Yes	S
391022	HSHW	First-Line Supervisors of Personal Service Workers	N/A	N/A	21.92	16.24	1.22	1380	23.15	14.90	3	No	S
331012	HSHW	First-Line Supervisors of Police and Detectives	N/A	N/A	44.57	33.55	0.38	659	46.78	31.21	6	No	N
511011	HSHW	First-Line Supervisors of Production and Operating Workers	0.46	90	30.76	19.6	0.75	2969	31.50	19.74	3	Yes	R
411011	HSHW	First-Line Supervisors of Retail Sales Workers	0.31	330	23.70	15.33	-0.01	11904	24.28	15.41	3	No	R
531047	HSHW	First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	N/A	N/A	26.99	17.52	1.05	4749	28.14	18.39	3	Yes	S
119051	HSHW	Food Service Managers	0.96	97	32.72	19.63	0.78	4029	35.34	20.18	3	No	R
131131	HSHW	Fundraisers	N/A	N/A	26.02	15.82	1.38	581	29.07	17.09	6	No	S
111021	HSHW	General and Operations Managers	1.17	454	50.65	21.89	1.16	19782	54.50	23.02	6	Yes	R
472121	HSHW	Glaziers	3.39	16	23.77	18.06	N/A	N/A	N/A	N/A	2	Yes	R
271024	HSHW	Graphic Designers	N/A	N/A	22.75	16.02	1.09	1843	27.34	17.78	6	Yes	S
211091	HSHW	Health Education Specialists	N/A	N/A	24.38	17.37	0.59	582	28.65	16.47	6	No	N
299021	HSHW	Health Information Technologists and Medical Registrars	N/A	N/A	28.18	16.04	2.32	547	30.19	17.40	4	Yes	S
251071	HSHW	Health Specialties Teachers, Postsecondary	N/A	N/A	N/A	N/A	2.63	873	45.15	25.60	6	No	S
292099	HSHW	Health Technologists and Technicians, All Other	N/A	N/A	21.09	15.67	0.89	832	20.99	15.62	4	No	N
499021	HSHW	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	2.44	116	22.83	16.69	1.33	3986	23.74	16.99	4	No	R
533032	HSHW	Heavy and Tractor-Trailer Truck Drivers	1.23	286	22.72	16.59	1.00	14319	23.89	16.81	4	Yes	R
113121	HSHW	Human Resources Managers	0.96	12	55.51	36.56	1.20	905	61.58	37.41	6	Yes	S
131071	HSHW	Human Resources Specialists	1.14	87	29.80	17.48	0.98	6058	33.06	19.68	6	Yes	R
173026	HSHW	Industrial Engineering Technologists and Technicians	N/A	N/A	N/A	N/A	1.22	180	28.96	20.97	5	Yes	N
172112	HSHW	Industrial Engineers	N/A	N/A	40.55	24.13	2.02	1020	47.28	32.51	6	Yes	S
499041	HSHW	Industrial Machinery Mechanics	1.15	38	25.59	18.64	2.43	1629	26.66	18.43	4	Yes	R
537051	HSHW	Industrial Truck and Tractor Operators	2.31	123	19.55	16.34	N/A	N/A	N/A	N/A	1	Yes	R
151212	HSHW	Information Security Analysts	N/A	N/A	50.19	35.6	3.87	1326	53.78	34.11	6	Yes	S
519061	HSHW	Inspectors, Testers, Sorters, Samplers, and Weighers	0.39	62	22.15	14.85	0.22	2639	22.08	14.31	4	Yes	R
413021	HSHW	Insurance Sales Agents	N/A	N/A	29.23	16.47	1.54	6763	33.53	16.21	4	Yes	S
271025	HSHW	Interior Designers	N/A	N/A	27.13	15.32	1.28	1111	30.41	17.40	6	Yes	S
273091	HSHW	Interpreters and Translators	N/A	N/A	24.08	14.96	0.88	537	25.98	15.35	6	Yes	N
252012	HSHW	Kindergarten Teachers, Except Special Education	N/A	N/A	24.31	22.02	1.09	1007	28.36	20.92	6	No	S
292061	HSHW	Licensed Practical and Licensed Vocational Nurses	0.74	126	24.79	21.1	0.97	3657	25.85	20.69	101	No	R

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Mean Wage of \$27.05/hour and Entry Wage of \$17.27/hour

SOC Code*	HSHW**	Occupation Title*	Regional				Statewide				LMEC Code	In Targeted Industry?	Qualifying Level***	
			% Growth	Annual Openings	2022 Hourly Wage		% Growth	Annual Openings	2022 Hourly Wage					
					Mean	Entry			Mean	Entry				
194099		Life, Physical, and Social Science Technicians, All Other	N/A	N/A	21.87	13.95	0.97	297	23.80	13.89	6	Yes	N	
132072		Loan Officers	-0.09	21	33.41	16.31	0.95	2573	34.51	16.94	6	Yes	S	
119081	HSHW	Lodging Managers	N/A	N/A	40.31	19.85	1.92	726	41.52	20.30	6	No	S	
131081	HSHW	Logisticians	2.07	13	32.00	18.79	2.52	1336	33.71	20.25	6	Yes	S	
514041		Machinists	N/A	N/A	23.87	16.91	0.91	973	23.14	16.53	4	Yes	N	
499071		Maintenance and Repair Workers, General	2.00	263	20.03	14.96	N/A	N/A	N/A	N/A	2	Yes	R	
131111	HSHW	Management Analysts	2.65	154	41.65	24.39	1.55	8744	43.15	22.10	6	Yes	R	
119199	HSHW	Managers, All Other	1.15	84	54.89	30.1	0.80	4947	60.50	32.68	6	No	R	
131161		Market Research Analysts and Marketing Specialists	2.35	104	30.47	17.1	2.14	6455	38.37	19.54	6	Yes	R	
131161		Market Research Analysts and Marketing Specialists	N/A	N/A	N/A	N/A	N/A	N/A	17.72	38.37	6	No	R	
112021	HSHW	Marketing Managers	N/A	N/A	63.93	29.71	1.35	1641	72.61	38.26	6	Yes	S	
319011		Massage Therapists	N/A	N/A	22.91	14.48	2.10	2356	24.31	16.20	4	No	S	
172141	HSHW	Mechanical Engineers	0.86	10	42.47	27.07	1.99	718	45.56	29.88	6	Yes	S	
119111	HSHW	Medical and Health Services Managers	2.75	130	49.34	29.7	3.18	4300	57.46	31.27	6	No	R	
319092		Medical Assistants	2.12	260	18.61	15.81	2.55	11110	18.21	15.29	4	No	R	
499062		Medical Equipment Repairers	N/A	N/A	23.33	15.96	2.02	699	25.65	16.52	5	Yes	S	
292072		Medical Records Specialists	1.12	31	21.58	15.62	1.58	1578	22.75	15.72	4	No	R	
191042	HSHW	Medical Scientists, Except Epidemiologists	N/A	N/A	46.32	24.84	N/A	N/A	47.67	27.31	6	Yes	N	
436013		Medical Secretaries and Administrative Assistants	1.13	182	17.95	14.5	1.53	8346	18.04	14.57	3	No	R	
131121		Meeting, Convention, and Event Planners	N/A	N/A	23.63	16.82	1.97	1318	26.60	16.74	6	No	S	
211023		Mental Health and Substance Abuse Social Workers	N/A	N/A	20.22	14.33	1.42	475	22.85	15.66	6	No	N	
			0.58	83	29.00	20.98	1.14	2891	28.22	21.36	6	No	R	
252022	HSHW	Middle School Teachers, Except Special and Career/Technical Education												
493042		Mobile Heavy Equipment Mechanics, Except Engines	1.59	14	N/A	N/A	1.42	870	27.11	18.98	4	Yes	S	
493051		Motorboat Mechanics and Service Technicians	N/A	N/A	25.00	17.86	1.24	559	24.82	17.26	4	Yes	S	
272042	HSHW	Musicians and Singers	N/A	N/A	40.00	16.02	0.72	1481	52.18	18.35	3	No	S	
119121	HSHW	Natural Sciences Managers	N/A	N/A	57.17	30.24	0.97	339	51.24	26.29	6	Yes	N	
151244	HSHW	Network and Computer Systems Administrators	0.83	25	40.31	24.7	1.06	1878	44.05	27.85	6	Yes	S	
311131		Nursing Assistant	1.00	421	17.14	15.03	N/A	N/A	N/A	N/A	4	Yes	R	
195011	HSHW	Occupational Health and Safety Specialists	N/A	N/A	32.90	19.6	1.77	570	33.82	21.13	6	Yes	S	
312011	HSHW	Occupational Therapy Assistants	N/A	N/A	31.74	26.73	2.91	562	32.30	26.39	5	No	S	
			2.09	77	22.26	17.81	N/A	N/A	N/A	N/A	2	Yes	R	
472073		Operating Engineers and Other Construction Equipment Operators												
152031	HSHW	Operations Research Analysts	N/A	N/A	35.02	18.44	2.69	668	38.73	21.01	6	Yes	S	
292057		Ophthalmic Medical Technicians	N/A	N/A	21.38	15.76	2.58	772	20.72	15.03	4	No	S	
472141		Painters, Construction and Maintenance	1.51	66	20.36	16.03	N/A	N/A	N/A	N/A	1	Yes	R	
232011		Paralegals and Legal Assistants	1.49	106	24.48	17.05	1.66	4273	27.24	19.12	5	Yes	R	
292043	HSHW	Paramedics	<0%	13	26.58	21.53	N/A	N/A	N/A	N/A	4	Yes	R	
132052	HSHW	Personal Financial Advisors	N/A	N/A	63.23	20.68	2.05	2973	58.06	22.36	6	No	S	
372021		Pest Control Workers	0.68	56	23.10	16.97	N/A	N/A	N/A	N/A	2	No	R	
292052		Pharmacy Technicians	1.51	108	18.07	15.64	0.66	3604	18.40	15.33	4	No	R	
319097		Phlebotomists	N/A	N/A	18.03	15.6	1.91	1498	18.07	15.29	4	No	S	
312021	HSHW	Physical Therapist Assistants	N/A	N/A	30.35	23.3	3.18	1444	31.83	24.26	5	No	S	
291071	HSHW	Physician Assistants	4.06	26	55.83	38.37	N/A	N/A	N/A	N/A	7	Yes	R	
472151		Pipelayers	2.00	8	21.50	17.18	N/A	N/A	N/A	N/A	1	Yes	R	
472152		Plumbers, Pipefitters, and Steamfitters	1.90	107	22.57	16.51	0.93	3212	23.48	17.31	4	No	R	
333051	HSHW	Police and Sheriff's Patrol Officers	N/A	N/A	29.72	21.67	0.45	4137	35.26	22.98	5	No	S	
251199	HSHW	Postsecondary Teachers, All Other	2.28	80	28.07	20.15	N/A	N/A	N/A	N/A	7	No	R	
272012	HSHW	Producers and Directors	N/A	N/A	30.87	17.91	0.89	890	38.96	19.74	6	Yes	N	
435061		Production, Planning, and Expediting Clerks	0.75	57	22.30	16.41	1.08	2074	24.90	16.74	3	Yes	R	
131082	HSHW	Project Management Specialists	1.80	106	41.55	24.75	1.33	5530	45.73	26.96	6	Yes	R	
132020	HSHW	Property Appraisers and Assessors	0.79	12	34.36	20.72	1.03	661	35.89	20.15	6	No	S	
119141	HSHW	Property, Real Estate, and Community Association Managers	0.66	68	30.78	17.34	1.14	4085	34.37	18.51	6	No	R	
292053		Psychiatric Technicians	2.00	55	19.97	15.2	N/A	N/A	N/A	N/A	4	Yes	R	
273031	HSHW	Public Relations Specialists	0.67	40	29.46	18.38	1.27	2181	31.61	18.17	6	Yes	R	
435031		Public Safety Telecommunications	2.00	19	23.26	18.33	N/A	N/A	N/A	N/A	2	No	R	
113061	HSHW	Purchasing Managers	N/A	N/A	59.51	36.04	1.03	336	64.74	39.86	6	Yes	N	
292034	HSHW	Radiologic Technologists and Technicians	0.72	29	28.62	21.71	1.06	1012	29.94	22.40	5	No	S	
419021	HSHW	Real Estate Brokers	N/A	N/A	58.74	24.36	0.92	1510	N/A	N/A	4	No	N	
419022		Real Estate Sales Agents	N/A	N/A	27.45	17.09	0.90	6718	27.20	14.69	4	No	S	
291141	HSHW	Registered Nurses	0.65	371	36.87	28.21	0.85	13934	38.42	28.87	6	No	R	
212099		Religious Workers, All Other	N/A	N/A	19.16	13.14	1.12	595	23.29	14.62	102 of 124	No	S	

2024-2025 Local Targeted Occupations List

Sorted by Occupational Title

Workforce Development Area 20 - Indian River, Martin, and St. Lucie counties

Selection Criteria:

- 1 LMEC Educational Requirements:1 (No formal educational requirement) 2 (HS Diploma or Equivalent) 3 (Some College, No Degree), 4 (Postsecondary Non-Degree Award), 5 (Associate Degree), or 6 (Bachelor's Degree), or 7 (Master's Degree)
- 2 30 annual openings and positive growth
- 3 Mean Wage of \$17.27/hour and Entry Wage of \$14.04/hour
- 4 High Skill/High Wage (HSHW) Occupations:
Mean Wage of \$27.05/hour and Entry Wage of \$17.27/hour

SOC Code*	HSHW**	Occupation Title*	Regional				Statewide				LMEC Training Code	In Targeted Industry?	Qualifying Level***
			Annual % Growth	Annual Openings	2022 Hourly Wage		Annual % Growth	Annual Openings	2022 Hourly Wage				
					Mean	Entry			Mean	Entry			
291126	HSHW	Respiratory Therapists	N/A	N/A	31.75	28.65	1.48	651	33.04	26.99	5	No	S
472181		Roofers	3.11	140	22.18	15.68	N/A	N/A	N/A	N/A	1	Yes	R
112022	HSHW	Sales Managers	N/A	N/A	60.79	30.17	1.03	2679	67.28	33.51	6	Yes	S
413091		Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	1.15	235	29.90	15.57	1.24	13053	32.15	16.86	6	Yes	R
414012	HSHW	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	N/A	N/A	34.06	17.3	0.84	9540	34.40	17.53	3	Yes	S
414011	HSHW	Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	N/A	N/A	47.49	23.94	1.00	2544	49.76	23.68	6	Yes	S
252031	HSHW	Secondary School Teachers, Except Special and Career/Technical Education	0.63	106	29.63	22.33	1.12	4201	30.51	22.80	6	No	R
413031	HSHW	Securities, Commodities, and Financial Services Sales Agents	1.41	83	33.58	20.6	1.51	4322	38.88	20.22	6	No	R
492098		Security and Fire Alarm Systems Installers	N/A	N/A	21.65	15.95	1.49	962	22.67	16.11	4	No	S
472211		Sheet Metal Workers	1.79	45	22.54	17.06	N/A	N/A	N/A	N/A	2	Yes	R
435071		Shipping, Receiving, and Traffic/Inventory Clerks	2.00	95	18.65	13.89	N/A	N/A	N/A	N/A	2	Yes	R
119151	HSHW	Social and Community Service Managers	1.54	30	32.50	19.72	1.57	952	35.73	22.14	6	No	R
211093		Social and Human Service Assistants	5.00	94	18.40	14.52	N/A	N/A	N/A	N/A	3	No	R
211029		Social Workers, All Other	N/A	N/A	22.00	18.29	0.19	398	26.92	18.18	6	No	N
151252	HSHW	Software Developers	N/A	N/A	53.91	31.79	3.29	7653	54.47	33.20	6	Yes	S
151253	HSHW	Software Quality Assurance Analysts and Testers	N/A	N/A	41.30	20.91	2.76	1353	43.14	25.38	6	Yes	S
252058	HSHW	Special Education Teachers, Secondary School	N/A	N/A	26.46	21.59	1.07	732	31.84	22.73	6	No	S
271014	HSHW	Special Effects Artists and Animators	N/A	N/A	N/A	N/A	1.52	477	31.86	23.20	6	Yes	N
152041	HSHW	Statisticians	N/A	N/A	N/A	N/A	N/A	N/A	19.58	40.30	5	No	S
537065		Stockers and Order Fillers	2.00	836	16.71	13.92	N/A	N/A	N/A	N/A	2	Yes	R
472221		Structural Iron and Steel Workers	7.00	9	22.34	16.79	N/A	N/A	N/A	N/A	2	Yes	R
211018		Substance Abuse, Behavioral Disorder, and Mental Health Counselors	1.93	54	26.04	17.9	2.35	1897	25.15	16.89	6	No	R
292055		Surgical Technologists	N/A	N/A	25.10	20.44	0.80	636	25.11	19.67	4	No	N
173031		Surveying and Mapping Technicians	0.67	20	21.52	15.11	1.67	818	22.10	15.65	5	Yes	S
253099		Teachers and Instructors, All Other	N/A	N/A	24.69	14.74	N/A	N/A	N/A	N/A	6	No	N
492022		Telecommunications Equipment Installers and Repairers, Except Line Installers	N/A	N/A	32.00	22.72	0.61	1980	26.33	16.40	4	No	S
499052		Telecommunications Line Installers and Repairers	N/A	N/A	23.62	16.14	0.80	729	24.41	17.80	4	No	N
472044		Tile and Stone Setters	2.58	17	22.45	16.76	N/A	N/A	N/A	N/A	1	Yes	R
131151	HSHW	Training and Development Specialists	1.56	57	30.39	17.4	1.60	2834	32.04	18.30	6	Yes	R
113071	HSHW	Transportation, Storage, and Distribution Managers	1.92	13	48.93	26.5	1.19	989	52.70	27.89	6	Yes	S
319096		Veterinary Assistants and Laboratory Animal Caretakers	3.00	50	16.56	13.51	N/A	N/A	N/A	N/A	2	No	R
292056		Veterinary Technologists and Technicians	N/A	N/A	17.50	13.88	2.43	1387	18.30	14.21	5	Yes	S
151255	HSHW	Web and Digital Interface Designers	N/A	N/A	44.56	24.68	2.30	480	41.03	23.48	5	Yes	N
151254	HSHW	Web Developers	N/A	N/A	42.88	20.69	2.47	602	39.00	24.91	5	Yes	S
514121		Welders, Cutters, Solderers, and Brazers	1.33	65	23.01	17.58	0.79	1975	22.45	16.64	4	Yes	R
273043	HSHW	Writers and Authors	N/A	N/A	27.45	16.82	0.89	601	30.28	18.05	6	No	N

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

**HSHW = High Skill/High Wage.

***Qualifying Level:

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

S = Meets statewide wage and openings criteria based on state Labor Market Statistics employer survey data.

N = Meets national wage and openings criteria based on national Labor Market Statistics employer survey data.

N/A = Not available/releasable.

LMEC = Labor Market Estimating Conference

AGENDA ITEM SUMMARY

Title	Department of Commerce (FLORIDACOMMERCE) Grantee/Subgrantee Agreement for Program Years 2024-2027
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Workforce Innovation & Opportunity Act (WIOA): Role of Local Workforce Boards
Action Requested	Review AND Approve Acceptance of the Department of Commerce (FLORIDACOMMERCE) Grantee/Subgrantee Agreement for Program Years 2024-2027
Background	<p>The Department of Commerce (FLORIDACOMMERCE) is Florida's designated state agency for the receipt of federal workforce development funds. It is required to carry out the duties and responsibilities assigned by the Governor under each federal grant assigned to the department. CareerSource Research Coast (CSRC) is the subrecipient of these federal workforce development funds, as that term is defined by federal law, and the recipient of these same funds as defined by state law. Furthermore, and pursuant to section 121(h) of WIOA (Pub. L. 113-128) and section 445.009(2)(C), Florida Statutes, FLORIDACOMMERCE, and CSRC intend for this agreement to satisfy the requirements whereby CSRC enters into a memorandum of understanding and infrastructure funding agreement with each mandatory or optional partner participating in the one-stop delivery system.</p> <p>At the discretion of the CSRC Board of Directors, signatory authority may be granted to the Board Chair.</p>
Staff Recommendation	Review and Approve Acceptance of the FLORIDACOMMERCE Grantee/Subgrantee Agreement for Program Years 2024-2027
Supporting Materials	Link to: https://careersourcerc.com/wp-content/uploads/2024/09/RWB20_-_Agreement.docx.pdf
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

AGENDA ITEM SUMMARY

Title	WIOA Local and Regional Workforce Plan Draft for 2025-2028
Strategic Plans/Goals	Administrative and Strategic Planning
Policy/Plan/Law	Workforce Innovation & Opportunity Act (WIOA); Role of LWDB's
Action Requested	Review and Approve the WIOA Local and Regional Workforce Plan Draft for 2025-2028
Background	<p>WIOA requires each local workforce development board (LWDB), in partnership with the appropriate chief local elected official(s), to develop and submit a comprehensive four-year local plan to the state. If the local workforce development area (local area) is part of a planning region, the LWDB will submit its regional plan as part of the local plan and will not submit a separate regional plan. The local and regional plan provides the framework for local areas to define how their workforce development systems will achieve the purposes of WIOA, pursuant to 20 Code of Federal Regulations (CFR) 679.500 and 20 CFR 679.540.</p> <p>Additionally, local and regional plans must be modified at the end of the first two-year period of the four-year local plan to reflect changes in labor market and economic conditions and other factors affecting the implementation of the local plan. Federal regulations require states and LWDBs to regularly revisit and recalibrate local and regional plan strategies in response to changing economic conditions and workforce needs of the state (20 CFR 676.135).</p>
Staff Recommendations	Review and Approve the WIOA Local and Regional Workforce Plan Draft for 2025-2028
Supporting Material	WIOA Local and Regional Workforce Plan Draft for 2025-2028, sent as separate attachment
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

AGENDA ITEM SUMMARY

Title	Internal Control Questionnaire (ICQ) for PY 2024-2025
Strategic Goal	Optimal Use of Resources
Policy/Plan/Law	Workforce Innovation & Opportunity Act: Role of LWDB's
Action Required	Review and Approve Internal Control Questionnaire (ICQ) For PY 2024-2025
Background	<p>The Internal Control Questionnaire (ICQ) has been developed by the Department of Commerce (FLORIDACOMMERCE) as a self-assessment tool for the agency's sub-recipients to help evaluate whether a system of sound internal control exists within their organization. An effective system of internal control provides reasonable assurance that management's goals are being properly pursued. Each organization's management team sets the tone and has ultimate responsibility for a strong system of internal controls.</p> <p>The ICQ is submitted to FLORIDACOMMERCE by the organization's President/CEO. Responses should reflect the entity's management team's knowledge and perspective of the controls in place as of the time the questionnaire is completed.</p>
Staff Recommendation	Review and Approve the Internal Control Questionnaire (ICQ) for PY 2024-2025
Supporting Materials	Link to: https://careersourcerc.com/wp-content/uploads/2024/09/2024-2025-ICQ-and-Assessment-Final-09-03-24.pdf
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com 866-482-4473 ext. 418

AGENDA ITEM SUMMARY

Title	LWDB20 Proposed Primary Indicators of Performance for PY 2024 & 2025
Strategic Plans/Goals	Clear, Credible, and Trustworthy Commitments and Projects
Policy/Plan/Law	Workforce Innovation and Opportunities Act (WIOA) Title I Programs and Title III Wagner-Peyser (WP) Act; Training and Employment Guidance Letter 19-20.
Action Requested	Review and Approve Acceptance of LWDB20 Proposed Primary Indicators of Performance - PY 2024 & 2025
Background	The State of Florida must negotiate and agree upon performance levels for WIOA programs, and the WP Act funded by the United States Department of Labor, Employment, and Training Administration. Once the state levels are agreed upon, the Department of Commerce (FLORIDACOMMERCE) must negotiate and reach agreements with the Local Workforce Development Boards for their local performance levels.
Staff Recommendation	Review and Approve Acceptance of LWDB20 Proposed Primary Indicators of Performance - PY 2024 & 2025
Supporting Material	PY 2024 & 2025 Local Performance Levels Negotiation Response
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

PY 2024 & 2025 Local Performance Levels Negotiation Response

Local Workforce Development Board (LWDB): 20	Career Source Research Coast
LWDB Contact Name: Brian Bauer, President/CEO	
LWDB Contact Email:	bbauer@careersourcerc.com
LWDB Contact Email:	tmc Morris@careersourcerc.com
LWDB Contact Email:	

Measures	PY 2024 Proposed Performance Levels	Accept Proposed Performance Levels? (Select Yes or No From Drop Down)	Proposed Level of Performance (Leave blank if accepting Performance Level)	Rationale for Proposed Level of Performance (Leave blank if accepting Performance Level)	Measures	PY 2025 Proposed Performance Levels	Accept Proposed Performance Levels? (Yes or No)	Proposed Level of Performance (Leave blank if accepting Performance Level)	Rationale for Proposed Level of Performance (Leave blank if accepting Performance Level)
Adults:					Adults:				
Employed 2nd Qtr After Exit	93.3%	YES			Employed 2nd Qtr After Exit	93.3%	YES		
Employed 4th Qtr After Exit	91.1%	YES			Employed 4th Qtr After Exit	91.1%	YES		
Median Wage 2nd Quarter After Exit	\$9,886	YES			Median Wage 2nd Quarter After Exit	\$9,886	YES		
Credential Attainment Rate	85.7%	YES			Credential Attainment Rate	85.7%	YES		
Measurable Skill Gains	71.2%	YES			Measurable Skill Gains	71.2%	YES		
Dislocated Workers:					Dislocated Workers:				
Employed 2nd Qtr After Exit	92.0%	YES			Employed 2nd Qtr After Exit	92.0%	YES		
Employed 4th Qtr After Exit	91.0%	YES			Employed 4th Qtr After Exit	91.0%	YES		
Median Wage 2nd Quarter After Exit	\$10,794	NO	\$9,800	Based on our 5-year historical, along with actual PY23-24 attainment is less than the proposed target.	Median Wage 2nd Quarter After Exit	\$10,794	NO	\$10,250	For continuous improvement based on PY24-25 target
Credential Attainment Rate	89.2%	YES			Credential Attainment Rate	89.2%	YES		
Measurable Skill Gains	79.9%	YES			Measurable Skill Gains	79.9%	YES		
Youth:					Youth:				
Employed 2nd Qtr After Exit	80.6%	YES			Employed 2nd Qtr After Exit	80.6%	YES		
Employed 4th Qtr After Exit	73.0%	YES			Employed 4th Qtr After Exit	73.0%	YES		
Median Wage 2nd Quarter After Exit	\$3,196	NO	\$3,500	Based on PY23-24 metric result, we believe we can attain a higher median wage than what is proposed.	Median Wage 2nd Quarter After Exit	\$3,196	NO	\$3,800	For continuous improvement based on PY24-25 target
Credential Attainment Rate	90.1%	NO	88.20%	Based on credential attainment decisions with participants in the Q3 2023-24 through Q2 2024-25 performance cohorts.	Credential Attainment Rate	90.1%	YES		
Measurable Skill Gains	86.3%	YES			Measurable Skill Gains	86.3%	YES		
Wagner-Peyser:					Wagner-Peyser:				
Employed 2nd Qtr After Exit	66.3%	YES			Employed 2nd Qtr After Exit	66.3%	YES		

Employed 4th Qtr After Exit	62.1%	YES		
Median Wage 2nd Quarter After Exit	\$6,295	YES		

Employed 4th Qtr After Exit	62.1%	YES		
Median Wage 2nd Quarter After Exit	\$6,295	YES		

AGENDA ITEM SUMMARY

Title	Designee for Dr. Timothy Moore, President, Indian River State College
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA): Role of Local Workforce Boards
Action Requested	Review and Approve Declarations of Authority, as presented.
Background	The By-Laws of the Workforce Development Board permits mandatory board members to designate a single, high-ranking designee with decision-making authority from his/her organization to represent him/her at Board and/or at standing or Ad-Hoc committee meetings. Per the Boards By-Laws, Dr. Timothy Moore has requested that Dr. Prasnath Pilly represent him at the Board of Directors and the Programs and Services Committee meetings when Dr. Moore is not available to attend. The Board must approve all designees.
Staff Recommendations	Review and Approve Prasanth Pilly as Designee for Timothy Moore, President, of Indian River State College
Supporting Material	Declarations of Authority
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866)482-4473 ext. 418



DECLARATION OF AUTHORITY
THE WORKFORCE DEVELOPMENT
BOARD OF THE TREASURE COAST, INC.

Board Member's Name: Dr. Timothy Moore

Board Member's Title: President

Board Member's Organization: Indian River State College

Board Seat (select all that apply):

- Local Educational Entity
- Postsecondary educational institution/community college
- Labor or employee representative
- Community based organization
- Economic development agency
- One-Stop partner
- Private education provider (non-profit)
- Private education provider (for-profit)

I hereby designate the following individual to represent me at Board and Board committee meetings for the duration of my appointment to the Workforce Development Board, as necessary. I have instructed this designee as to the roles and responsibilities of a Board member, as well as the policies and procedures of the Board and have given this designee the authority to act on my behalf and attest that this individual has authority to make decisions and commitments for our organization.

Name of Designee: Dr. Prashanth Pilly

Title of Designee: Associate Vice Provost of Academic Affairs

Mailing Address of Designee: 3209 Virginia Avenue, Ft. Pierce, FL 34981

Designee Telephone Number: 772-462-7212 Fax Number: _____

Designee Email: ppilly@irsc.edu

By our signatures below, we agree that the above designee will represent the above named Board member at Board and Board committee meetings until further notice:

Board Member Signature: _____ Date: 7/8/24

Designee Signature: _____ Date: 07/11/2024

AGENDA ITEM SUMMARY

Title	LWDB 20 Primary Indicators of Performance for Program Year (PY) 2023-2024 4th Quarter
Strategic Plans/Goals	Clear, Credible, and Trustworthy Commitments and Projects
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA) Title I Programs and Title III Wagner-Peyser (WP) Act; Training and Employment Guidance Letter No. 09-20
Action Requested	For Information Only
Background	<p>The State of Florida must negotiate and agree upon performance levels for WIOA, and WP programs funded by the United States Department of Labor, Employment, and Training Administration. Once the state levels are established, the Department of Economic Opportunity (DEO) must negotiate and reach agreements with the Local Workforce Development Boards for their local performance targets.</p> <p>Staff will review CareerSource Research Coast's performance for the 4th quarter of PY2023-2024.</p>
Staff Recommendations	None - Information Only
Supporting Material	LWDB 20 PY2023-2024 4th Quarter Performance Link: https://www.floridajobs.org/local-workforce-development-board-resources/program-monitoring-and-reports/state-program-reports/common-measures-performance-reports
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

LWDB 20

Measures	PY2021-2022 4th Quarter Performance	PY2021-2022 % of Performance Goal Met For Q4	PY2021-2022 Performance Goals	PY2022-2023 1st Quarter Performance	PY2022-2023 % of Performance Goal Met For Q1	PY2022-2023 2nd Quarter Performance	PY2022-2023 % of Performance Goal Met For Q2	PY2022-2023 3rd Quarter Performance	PY2022-2023 % of Performance Goal Met For Q3	PY2022-2023 4th Quarter Performance	PY2022-2023 % of Performance Goal Met For Q4	PY2022-2023 Performance Goals	PY2023-2024 1st Quarter Performance	PY2023-2024 % of Performance Goal Met For Q1	PY2023-2024 2nd Quarter Performance	PY2023-2024 % of Performance Goal Met For Q2	PY2023-2024 3rd Quarter Performance	PY2023-2024 % of Performance Goal Met For Q3	PY2023-2024 4th Quarter Performance	PY2023-2024 % of Performance Goal Met For Q4	PY2023-2024 Performance Goals
Adults:																					
Employed 2nd Qtr After Exit	91.80	96.63	95.00	90.9	99.24	89.90	98.14	87.90	95.96	93.70	102.29	91.60	93.50	102.07	93.80	102.40	94.70	103.38	94.70	103.38	91.60
Median Wage 2nd Quarter After Exit	\$12,545	140.96	\$8,900	\$11,826	128.50	\$11,925	129.58	\$11,925	129.58	\$12,850	139.62	\$9,203	\$12,798	139.06	\$12,901	140.18	\$12,301	133.66	\$13,000	141.26	\$9,203
Employed 4th Qtr After Exit	92.80	97.68	95.00	94.9	104.17	88.30	96.93	88.30	96.93	87.70	96.27	91.10	85.90	94.29	91.00	99.89	90.70	99.56	93.80	102.96	91.10
Credential Attainment Rate	93.40	131.55	71.00	92.9	105.57	89.70	101.93	88.60	100.68	89.60	101.82	88.00	89.60	101.82	94.70	107.61	94.40	107.27	94.30	107.16	88.00
Measurable Skill Gains	100.00	149.25	67.00	85.6	100.35	85.40	100.12	77.00	90.27	100.00	117.23	85.30	80.60	94.49	79.40	93.08	80.30	94.14	99.30	116.41	85.30
Dislocated Workers:																					
Employed 2nd Qtr After Exit	78.60	87.33	90.00	76.00	86.36	74.10	84.20	78.60	89.32	92.30	104.89	88.00	92.90	105.57	81.80	92.95	100.00	113.64	100.00	113.64	88.00
Median Wage 2nd Quarter After Exit	\$10,109	129.60	\$7,800	\$10,858.00	125.70	\$11,511	133.26	\$11,214	129.82	\$10,628	123.04	\$8,638	\$9,784	113.27	\$9,749	112.86	\$9,399	108.81	\$9,749	112.86	\$8,638
Employed 4th Qtr After Exit	100.00	114.94	87.00	100.00	108.11	82.10	88.76	84.00	90.81	85.20	92.11	92.50	82.10	88.76	92.30	99.78	92.90	100.43	90.90	98.27	92.50
Credential Attainment Rate	100.00	142.86	70.00	100.00	132.63	93.80	124.40	93.80	124.40	88.20	116.98	75.40	88.20	116.98	85.70	113.66	85.70	113.66	100.00	132.63	75.40
Measurable Skill Gains	100.00	138.89	72.00	100.00	129.37	92.30	119.40	100.00	129.37	100.00	129.37	77.30	81.80	105.82	75.00	97.02	75.00	97.02	100.00	129.37	77.30
Youth:																					
Employed 2nd Qtr After Exit	76.90	96.13	80.00	74.80	92.12	66.90	82.39	64.70	79.68	71.60	88.18	81.20	73.50	90.52	77.80	95.81	82.50	101.60	87.30	107.51	81.20
Median Wage 2nd Quarter After Exit	\$3,349	98.50	\$3,400	\$3,050.00	93.53	\$3,453	105.89	\$3,041	93.25	\$3,099	95.03	\$3,261	\$4,158	127.49	\$3,935	120.67	\$4,321	132.49	\$4,830	148.11	\$3,261
Employed 4th Qtr After Exit	82.20	105.38	78.00	82.40	104.57	67.80	86.04	69.50	88.20	67.90	86.17	78.80	65.50	83.12	78.40	99.49	82.40	104.57	85.70	108.76	78.80
Credential Attainment Rate	100.00	108.70	92.00	100.00	113.38	100.00	113.38	100.00	113.38	96.60	109.52	88.20	100.00	113.38	85.00	96.37	75.50	85.60	79.50	90.14	88.20
Measurable Skill Gains	96.60	132.33	73.00	92.90	114.69	86.00	106.17	88.20	108.89	98.70	121.85	81.00	95.20	117.53	96.40	119.01	90.60	111.85	98.80	121.98	81.00
Wagner Peysers:																					
Employed 2nd Qtr After Exit	65.00	95.59	68.00	63.00	96.48	61.90	94.79	63.50	97.24	64.00	98.01	65.30	64.40	98.62	63.80	97.70	63.90	97.86	63.60	97.40	65.30
Median Wage 2nd Quarter After Exit	\$6,936	136.00	\$5,100	\$6,686.00	120.69	\$6,734.00	121.55	\$6,989	126.16	\$6,964	125.70	\$5,540	\$7,208	130.10	\$7,424	134.01	\$7,239	130.67	\$7,426	134.04	\$5,540
Employed 4th Qtr After Exit	64.20	93.04	69.00	68.60	109.58	65.20	104.15	64.30	102.72	63.60	101.60	62.60	62.30	99.52	61.20	97.76	61.90	98.88	62.50	99.84	62.60

Not Met (less than 90% of negotiated)
Met (90-100% of negotiated)
Exceeded (greater than 100% of negotiated)

AGENDA ITEM SUMMARY

Title	One-Stop Operator Quarterly Reports 4th Quarter - PY 2023-2024
Strategic Plans/Goals	Effective Utilization of Current and Timely Operational Intelligence for all Stakeholders
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/Role of the One-Stop Operator
Action Requested	None - Information Only
Background	<p>The One-Stop Operator’s major function is the coordination of the service delivery among the required One-Stop System Partners and their programs for the Local Workforce Development Area 20 (LWDA 20), CareerSource Research Coast. The One-Stop Operator will navigate between the One-Stop Partners to ensure there is coordination of service delivery for employers and job seekers within the LWDA 20 One-Stop System.</p> <p>The One-Stop Operator requires a submission of written, quarterly reports to the Board of Directors regarding the progress towards the established goals of the One-Stop Operator.</p>
Staff Recommendations	None - Information Only
Supporting Material	One-Stop Operator Quarterly Report - Q4 - PY 2023-2024
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

COMPREHENSIVE ONE-STOP CAREER CENTER OPERATOR QUARTERLY REPORT

PROGRAM YEAR 23-24 FOURTH QUARTER

DATE: 08/07/2024

1. Overall Duty of the Comprehensive One-Stop Career Center Operator

Workforce Coordination Consulting, LLC (WCC) continues as the Comprehensive One-Stop Operator as their contract was renewed and signed effective July 1, 2024 through June 30, 2025. Planning and Oversight meetings have been held monthly during this quarter with CareerSource Research Coast (CSRC) Administration and the WCC partners, Eleanor Eberhart-Chin and Glenda Harden. WCC's major function is the coordination of the service delivery among the Comprehensive One-Stop Partners and their programs. WCC is responsible to navigate between the Comprehensive One-Stop partners to ensure there is coordination of service delivery for employers and career seekers within the LWDB 20 One-Stop System.

2. Memorandums of Understanding (MOUs) and Infrastructure Agreements (IFAs)

MOU – Workforce Coordination Consulting, LLC., as the Comprehensive One-Stop Operator, has worked with each of the Comprehensive One-Stop Partners during this quarter to update their MOUs to reflect any changes/modifications and to ensure compliance with Comprehensive One-Stop Career Center Federal and State regulations and requirements. The MOU covering the period of July 2024 through June 2027 has been updated, finalized and sent out to all partners for signature. Partner signatures have been obtained with the exception of the Department of Vocational Rehabilitation and the Division of Blind Services. WCC has continuously followed the progress on signature from these two partners.

IFA – Timesheets and the Time Records for Program Year 23-24 Quarter 4 have been sent to all partners to document their actual time spent in the Comprehensive One-Stop Career Center. In return, partners are submitting their required quarterly time records for invoicing. Invoices for Quarter 3 have been sent to all partners.

3. Coordination and Collaboration Activities

- **Partner Meetings** –WCC has met with the required Partners and their staff as needed throughout the quarter to provide guidance and assistance.

The Program Year 23-24 Fourth Quarter Meeting was held in person at the Comprehensive One-Stop Career Center at the Garden City location on 06/26/2024. The meeting was well attended by the Partners and their staff. A meeting Agenda was prepared and shared with all. Partners were reminded of their responsibilities as Partners in the One-Stop System and discussion followed regarding the required Quarterly Time Records, Sign In Sheets, Signature status of the updated MOU/IFA, Referrals utilizing the Crosswalk system and results of the Customer Satisfaction Survey. Questions, answers and comments were addressed.

The Agenda Item of the Customer Satisfaction Survey was discussed. After discussions with CSRC Administration at the April monthly meeting, it was decided Workforce Coordination Consulting would send the link for the survey, along with an email, to every customer listed in the Crosswalk Referral System. The email explains the purpose of the Survey and requests customers to complete it. This suggestion was initiated during the fourth quarter with no success. Ideas were requested from partners and it was decided that as staff conclude their meeting with customers, they will provide them the link to the Satisfaction Survey and ask that it be completed at that time.

A discussion regarding the status of agency signatures on the Comprehensive One-Stop Career Center Memorandum of Understanding (MOU)/Infrastructure Agreement (IFA) followed. The updated "Umbrella MOU"

COMPREHENSIVE ONE-STOP CAREER CENTER OPERATOR QUARTERLY REPORT

PROGRAM YEAR 23-24 FOURTH QUARTER

DATE: 08/07/2024

and the IFA has been updated and finalized by all partners for the July 2024 through June 2027 time period and sent to all Partner Agency Officials for signature. The MOU/IFA is effective as of July 1, 2024.

Updates regarding their organization's programs and services were provided by each of the Partners.

The Partners Quarterly Meeting Agenda and Minutes are attached for review.

Customer Satisfaction Survey - As discussed earlier in this report, there were no responses for the third quarter. Utilizing the strategy determined at the CSRC and Workforce Coordination Consulting monthly meeting, there were no results for the fourth quarter. At the Partner's Fourth Quarterly Meeting, the Customer Satisfaction Survey method has been revamped. Staff at the Comprehensive One-Stop Career Center, including partner staff onsite, will request customers to complete the survey while they are at the Center.

Client Referrals - During the fourth quarter of Program Year 23-24 there were 34 referrals from the One-Stop System partners. CSRC referred 37 customers to other partner services, Vocational Rehabilitation referred 10, Indian River State College referred 2. Referrals are submitted through the Crosswalk system which is being utilized by all partners. It is the responsibility of the One-Stop Operator, WCC, to monitor and evaluate the utilization and effectiveness of the system.

4. Conflict of Interest

Currently, WCC has no conflicts of interest.

5. Complying with Federal Regulations and Procurement Policies

CSRC followed federal guidelines and procurement policies as outlined in their Administrative Plan in procuring and contracting with Workforce Coordination Consulting, LLC as the Comprehensive One-Stop Career Center Operator. Recent monitoring of their practices was completed by their contracted Monitoring firm the week of October 30th 2023. As the Comprehensive One-Stop Career Center Operator, WCC is responsible for monitoring the Comprehensive One-Stop Career Center System. WCC has created a monitoring/compliance tool and met with CSRC Administration for review and approval of the tool.

6. Recommendations

A recommendation to request One-Stop Career Center customers to complete the Customer Satisfaction Survey at the time they complete their meeting/service at the Center was made at the Quarterly Partner's Meeting.

signature. Partner staff were asked to report on the status of signatures for their organization and report back on the status.

Updates regarding their organization's programs and services were provided by each of the Partners as follows:

CSRC is still actively working to find a new location for the Comprehensive One-Stop Career Center. A Community Job Fair will be held at the MidFlorida Event Center. Registration for jobseekers will begin in mid July and for employers on July 8th. The Comprehensive One-Stop Career Center has changed their Workshop Schedule from three days a week to five and shortened the workshops to one hour. New workshops will be offered: Personal Finance, Soft Skills, and Making the Most of Job Fairs. Gregory McDonald, One-Stop Manager invited the partners to attend and participate in this Job Fair.

Michael Hildago, IRSC/CTE provided a Flyer regarding their Apprenticeship program that has been established for any student who is enrolled in clock hours. Enrollment in this program requires individuals to be 18 years of age and employed in a job in the field they are pursuing. One popular Apprenticeship is AutoCad which is offered online and can be completed in one year. Michael provided an additional flyer regarding Apprenticeship opportunities and reported that 90% of completers earn an AS Degree, are guaranteed a job with a salary up to \$80,000 a year. Individuals who complete the Welding Apprenticeship Program are immediately hired by employers.

The IRSC Farmworker Career Development Program has completed their program year at 100%. The program will receive new funding in July.

The Economic Opportunity Center reported staff has been very involved in community outreach to reach underserved populations in an effort to engage these individuals, ages 19+, to continue their education and/or training.

Vocational Rehabilitation has new programs and services: Rehab Works which will provide pre-employment services, Individual Placement Support which is being provided in partnership with Helping People Succeed for rapid job placement for individuals with mental health issues, Pre Employment Transition Services which helps students who need extra support while they are attending classes, ARTCIE, which will focus on individuals with the most severe development disabilities by customizing employment in the area of arts, entertainment and recreation.

Possible dates for the next quarterly meeting were discussed.

The meeting was adjourned at 11:30 am.

Workforce Coordination Consulting, LLC
COMPREHENSIVE ONE-STOP CAREER CENTER
CAREERSOURCE RESEARCH COAST ONE-STOP CENTER – GARDEN CITY
QUARTERLY PARTNERS MEETING AGENDA
June 26, 2024

1. Welcome and Introductions
2. Sign In Sheet, Crosswalk/Referrals, Partner Invoices
3. Customer Satisfaction Survey
4. Update on Status of Signatures on updated Memorandum of Understanding/Infrastructure Funding Agreement
5. News/Updates from CareerSource – Gregory McDonald
6. Partner Updates:
 - a. IRSC/CTE
 - b. IRSC/Adult Education
 - c. Farmworker Career Development Program
 - d. Vocational Rehabilitation
 - e. AARP Foundation
 - f. Division of Blind Services
 - g. St. Lucie County Community Services
7. Open Discussion
8. Next Meeting/Possible Dates: September 17,24,25

COMPREHENSIVE ONE-STOP CAREER CENTER QUARTERLY PARTNERS MEETING 06/26/2024 MINUTES

The Partner's Meeting was held at the Garden City Comprehensive One-Stop Career Center

The Partner's Meeting was attended by the following:

- Eleanor Eberhart Chin, Workforce Coordination Consulting, LLC.
- Glenda Harden, Workforce Coordination Consulting, LLC. (by phone)
- Michael Hildago, Indian River State College
- Zachary Hoge, Vocational Rehabilitation
- Emily Hough, Vocational Rehabilitation
- Betty Guerrero. Farmworker Career Development Program, Indian River State College
- Jenny Champagne, Economic Opportunities Center, Indian River State College
- Merdly Duge, Economic Opportunities Center, Indian River State College
- Jeri Ewing, Economic Opportunities Center, Indian River State College
- Gregory McDonald, CSRC
- Sherika Perez/Division of Blind Services
- Cesar Vigo

AARP and St. Lucie County Community Center was not in attendance.

The Quarterly Partner's Meeting Agenda was emailed to all partners in advance, extra copies of the Agenda were made available to all in attendance. Welcome and introductions followed.

Eleanor Eberhart Chin reminded Partner staff of the importance of the Sign-In Sheets at the Comprehensive One-Stop Career Center (COSCC). It is important that partner staff sign in and out. There have been instances where staff forget to sign out. When this occurs, it is necessary for the partner organization to verify in writing their time at the Center. Invoices for shared costs of the COSCC are sent to Partner Organizations quarterly and the sign-in sheets are used to verify their time spent and the amount charged during the quarter.

The Customer Satisfaction Survey was discussed. In an effort to receive more responses from customers, Workforce Coordination Consulting has been emailing each customer who appears in the Crosswalk Referral System the link for the survey, asking for their input. This method has also proved to be unsuccessful. Discussion followed among the partners and Workforce Coordination Consulting and it was decided staff members will ask their customers to complete the Satisfaction Survey when they meet with them.

The Updated Memorandum of Understanding for the period of July 2024 through June 2027 was discussed. The MOU has been finalized and sent to all the Partner Organizations for

AGENDA ITEM SUMMARY

Title	Workforce Readiness Taskforce Report for 4th Quarter 2024
Strategic Plans/Goals	Administration & Strategic Planning
Policy/Plan/Law	CareerSource Florida Strategic Policy - Education and Industry Consortiums
Action Requested	Review Workforce Readiness (Education and Industry Consortium) 4 th Quarter Report
Background	<p>Section 445.007(15), Florida Statutes, requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated workforce service delivery area.</p> <p>This policy requires local workforce development boards to appoint education and industry consortiums composed of local leaders who provide independent information from stakeholders in their local area. Local workforce development boards shall consider this information in creating strategies and local plans that describe efforts to provide educational and workforce opportunities to businesses and job seekers. The goal is to align educational programming with industry needs at the local level.</p> <p>This policy applies to local education and industry consortiums and the local workforce development boards that appoint them. Education and industry consortiums act as independent advisory groups. Members do not have any direct or implied authority over local workforce development boards, their membership, or employees.</p>
Staff Recommendations	Review Workforce Readiness (Education and Industry Consortium) 4 th Quarter Report
Supporting Material	Workforce Readiness Taskforce Report for 4 th Quarter 2024
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

AGENDA ITEM SUMMARY

Title	Chair's Report
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Board Procedure
Action Requested	None - Information Only
Background	<p>The Chairperson will share information at the meeting with the Board, to include:</p> <ul style="list-style-type: none">• Board of Directors Member Orientation - PY 2024-2025• Board Member Participation in the Programs and Services Committee and the Youth Council
Staff Recommendations	None - Information Only
Supporting Material	CSFL Hope Florida Initiative - Employer Outreach Memo
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com 1-866-482-4473 ext. 418</p>

AGENDA ITEM SUMMARY

Title	LWDB20/CareerSource Research Coast - Updates
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Board Procedure
Action Requested	None - Information Only
Background	Each meeting the President/CEO shares information with the Board on events and issues important for Board members to know.
Staff Recommendations	None - Information Only
Supporting Material	None - Information Only
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

Agenda Item 19

AGENDA ITEM SUMMARY

Title	Open to the Board
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Board Procedure
Action Requested	Discussion
Background	This agenda item gives Board members the opportunity to introduce issues for general discussion, make announcements pertinent to the Board or provide feedback.
Staff Recommendations	None - Information Only
Supporting Material	None
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

AGENDA ITEM SUMMARY

Title	Open to the Public
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Board Procedure
Action Requested	Discussion
Background	At each meeting the public is given the opportunity to address the Board on any issues applicable to the Board.
Staff Recommendations	N/A
Supporting Material	None - Information Only
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418