

REVISED MEETING AGENDA

Meeting Details

Date: Wednesday, May 28, 2025

Time: 8:00 a.m.

Location: Virtual Only

Microsoft TEAMS Virtual Meeting Access

Access Code: 530 403 639#

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)

Voting Item

5. Consent Agenda (Page 7)
 - a. Review and Approve January 29, 2025, Board of Directors Meeting Minutes (Pages 8-12)
 - b. Review and Approve February 26, 2025, Program and Services Committee Meeting Minutes (Pages 13-19)
 - c. Review and Approve March 14, 2025, Executive Committee Meeting Minutes (Pages 20-24)
 - I. Review and Approve January Financial Reports - PY 2024-2025 (Pages 25-30)
 - II. Review and Approve Workforce Innovation Opportunity Act (Act) - Youth Program Incentive Payments Policy (Pages 31-35)
 - III. Review and Approve the Acceptance of Workforce Innovation Opportunity Act (WIOA) Youth - Measurable Skills Gains Policy Revisions (Pages 36-39)
 - IV. Review and Approve the Acceptance of the Workforce Innovation Opportunity Act (WIOA) Youth - Supportive Services Policy Revisions (Pages 40-45)
 - d. Review and Approve April 15, 2025, Youth Council Meeting Minutes (Pages 46-49)
 - e. Review and Approve May 16, 2025, Executive Committee Meeting Minutes (Pages 50-53)
 - I. Review and Approve February and March Financial Reports - PY 2024-2025 (Pages 54-65)

- II. Review and Approve Administrative - Safety Policy (Pages 66-73)
- 6. Review and Approve RFP 25-001-NDWG - Employer of Record (EOR) (Pages 74-76)
- 7. Review and Approve Slate of Officers - PY 2025-2026 (Page 77)
- 8. Review and Approve Executive Staff Discretionary Bonuses - PY 2024-2025 (Page 78)
- 9. Review and Approve Department of Commerce (FLORIDACOMMERCE) - Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs from July 1, 2025 - June 30, 2026 (79-81)

Information/Discussion

- 10. Primary Indicators of Performance - 2nd Quarter - PY 2024-2025 (Pages 82-83)
- 11. Letter Grade - Performance Update - 2nd Quarter - PY 2024-2025 (Page 84)
- 12. One-Stop Operator Quarterly Report - 3rd Quarter - PY 2024-2025 (Pages 85-90)
- 13. Workforce Readiness Taskforce 1st Quarter Report (Pages 91-95)
- 14. Chair's Report (Page 96)
 - a. Board Membership - Ad Hoc Search Committee
 - b. Facility Move/Office Closure - June 10-13, 16, 2025
- 15. President's Report (Page 97)
 - a. CareerSource Florida FWDA/Council/Board Meetings - May 19-21, 2025
 - CSFL Network Funding
 - c. CareerSource Research Coast Consolidation/Reorganization Update
 - FLORIDACOMMERCE Programmatic Monitoring Review - PY 2024-2025
 - CareerSource Research Coast Consolidation/Reorganization Update
- 16. Open to the Board (Page 98)
- 17. Open to the Public (Page 99)
- 18. Adjournment - Next Board of Directors Meeting June 25, 2025



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

#	BOARD MEMBER		09/25	01/29	05/28	06/25	Total
1	Werner	Bols	E	T			
2	Jim	Brann - Chair	X	T			
3	Pamela	Burchell	E	T			
4	Jose	Capellan	E	T			
5	Helene	Caseltine	X	T	Retired	Retired	Retired
6	Bob	Cenk	X	T			
7	Comm Larry	Leet * As of 12-1-2025 Comm Erin Lowry	X	E			
8	David	Freeland	E	T			
9	Jon Aliesha	Prince Seitz (Designee)	T	T			
10	Mike	Kauffmann	E	T			
11	Leslie	Kristof - Past Chair	X	T			
12	Michael Tracey	Maine Miller (Designee)	T	E			
13	Dr. Tim Prasanth	Moore Pilly (Designee)	X	T			
14	Terrance	Moore	T	T			
15	Dr. David Christie	Moore Shields (Designee)	T	T			
16	Wayne	Olson	T	T			
17	Lorna	Landherr	T	T			
18	Pete	Tesch	T	E			
19	David	Bean	T	E			
20	Will	Armstead	X	T			
21	Kevin	Staten	E	T			
22	Terissa	Aronson	T	T			
23	Kelly	Johnson	X	T			
24	Deb	Frazier	E	T			
#	ADMINISTRATIVE STAFF		09/25	01/29	05/28	06/25	Total
1	Brian	Bauer	X	T			
2	Tracey	McMorris	E	T			
3	Lisa	Delligatti	X	T			
4	Shelly	Batton	E	T			
5	Martin	Rivera/IT Dept	X	E			
5	Jennifer	Eimann	X	T			

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

Agenda Item 4

AGENDA ITEM SUMMARY

Title	Declarations of Conflict of Interest
Strategic	N/A
Plans/Goals	Public Law 105-220
Policy/Plan/Law	Information Only
Background/Action Requested	In the event that a conflict of interest arises due to business or employment interests of associates or close family members, a Regional Workforce Development Board member would be required to reveal that conflict, to refrain from voting on the issue and to file a memorandum of voting conflict Commission Form 8B
Staff Recommendations	Conflict of Interest Statement Form
Supporting Material	8B Memorandum of Voting Conflict
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

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	Consent Agenda
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Board By-Laws
Action Requested	Approve Consent Agenda as presented
Background	<p>5. Consent Agenda</p> <ul style="list-style-type: none"> a. Review and Approve January 29, 2025, Board of Directors Meeting Minutes b. Review and Approve February 26, 2025, Program and Services Committee Meeting Minutes c. Review and Approve March 14, 2025, Executive Committee Meeting Minutes <ul style="list-style-type: none"> I. Review and Approve January Financial Reports - PY 2024-2025 II. Review and Approve Workforce Innovation Opportunity Act (Act) - Youth Program Incentive Payments Policy III. Review and Approve the Acceptance of Workforce Innovation Opportunity Act (WIOA) Youth - Measurable Skills Gains Policy Revisions IV. Review and Approve the Acceptance of the Workforce Innovation Opportunity Act (WIOA) Youth - Supportive Services Policy Revisions d. Review and Approve April 15, 2025, 2025, Youth Council Meeting Minutes e. Review and Approve May 16, 2025, Executive Committee Meeting Minutes <ul style="list-style-type: none"> I. Review and Approve February and March Financial Reports - PY 2024-2025 II. Review and Approve Administrative - Safety Policy
Staff Recommendation	Review and Approve Consent Agenda Items as presented
Supporting Material	Meeting Minutes, Financial Reports, Policy Revisions
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>



Agenda Item 5a Board of Directors Meeting Minutes

January 29, 2025

Opening Remarks

1. Welcome & Attendance
2. Declaration of Conflict of Interest
3. Roll Call and Attendance
 - Board Members
 - Staff
4. Declarations of Conflict of Interest
5. Presentation by James Moore & Company of the Financial Statement Audit Year End June 30, 2024, and the 2023-IRS Form 990 Tax Return

Voting Items

6. Review and Approve Acceptance of Financial Statement Audit - Year-End June 30, 2024
7. Review and Approve Acceptance of 2023-IRS Form 990 Tax Return
8. Consent Agenda
 - a. Review and Approve September 25, 2024, Board of Directors Meeting Minutes
 - b. Review and Approve November 15, 2024, Executive Committee Meeting Minutes
 - I. Review and Approve August and September Financial Reports - PY 2023-2024
 - c. Review and Approve November 20, 2024, Program and Services Committee Meeting Minutes
 - d. Review and Approve January 17, 2025, Executive Committee Meeting Minutes
 - I. Review and Approve October and November Financial Reports - PY 2024-2025
 - e. Review and Approve January 21, 2024, Youth Council Meeting Minutes
9. Review and Approve December Financial Reports - PY2024-2025
10. Review and Approve Release of Employer of Record (EOR)/National Dislocated Worker Grant (DWG) Request for Proposal (RFP)
11. Review and Approve Executive Staff Holiday Gift Cards

Information/Discussion

12. Approved Negotiated Performance Levels - PY 2024 and PY 2025
13. Primary Indicators of Performance 1st Quarter - PY 2024-2025
14. One-Stop Operator Quarterly Report - 1st and 2nd Quarter - PY 2024-2025
15. Workforce Readiness Taskforce Quarterly Report
16. Chair's Report
17. President's Report
 - a. CareerSource Florida Council/Board Meetings - February 18-20, 2025
 - b. CareerSource Research Coast Consolidation/Reorganization Update

18. Open to the Board
19. Open to the Public
20. Adjournment - Next Board of Directors Meeting April 30, 2025

Members Participating In-Person

None – Virtual Only

Members Participating by Teleconference:

Terrance Moore	Werner Bols	Jim Brann
William Armstead	Jose Capellan	Helene Caseltine
Bob Cenk	Aliesha Seitz	Mike Kauffmann
Leslie Kristof	Prasanth Pilly	Christie Shields
Wayne Olson	Terrance Moore	Lorna Landherr
William Armstead	Kevin Staten	Terissa Aronson
Kelly Johnson	Deb Frazier	

Members Excused

Tracey Miller	Pete Tesch	David Bean
Erin Lowry		

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 4 - Declarations of Conflicts of Interest (COI):

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

Agenda Item 5 - Presentation by James Moore & Company of the Financial Statement Audit Year End June 30, 2024, and the 2023-IRS Form 990 Tax Return:

Corrine LaRoche from James Moore & Company has not yet joined the meeting. As a result, the committee agreed to move to agenda items 6-7 for review and approval.

Agenda Item 6 - Review and Approve Acceptance of Financial Statement Audit - Year-End June 30, 2024:

Brian Bauer, President/CEO, stated that the Executive Committee reviewed and approved the financial statement audit for the year ending June 30, 2024, at the January 17th meeting. Mr. Bauer highlighted that this was a clean audit.

Werner Bols made a motion to approve the Acceptance of Financial Reports for PY 2024-2025, as presented. Jose Capellan seconded the motion. The motion passed unanimously.

Agenda Item 7 - Review and Approve Acceptance of 2023-IRS Form 990 Tax Return:

Brian Bauer, President/CEO, explained that the IRS Form 990 tax return is required for 501c3 organizations. Mr. Bauer confirmed that it was straightforward and had been previously reviewed and approved by the Executive Committee.

Prasanth Pilly made a motion to approve the Acceptance of 2023-IRS Form 990 Tax Return, as presented. Helene Caseltine seconded the motion. The motion passed unanimously.

Agenda Item 8 - Consent Agenda:

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

With no further discussion, a motion was made by Werner Bols to approve the Consent Agenda, as presented. Helene Caseltine seconded the motion. The motion was passed unanimously.

Agenda Item 9 - Review and Approve December Financial Reports - PY2024-2025:

Lisa Delligatti, CFO, indicated that the dislocated worker funding for the current fiscal year has been fully utilized, necessitating the use of funds from other grants. Ms. Delligatti also provided insights into the budget spending, highlighting that while some categories are on target, support services have exceeded the budget.

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

Agenda Item 10 - Review and Approve Release of Employer of Record (EOR)/National Dislocated Worker Grant (DWG) Request for Proposal (RFP):

Brian Bauer, President/CEO, explained the necessity of initiating a formal bid process for the employer of record related to the dislocated worker grant, emphasizing the importance of this role in managing payroll during disaster recovery efforts. The board was asked to approve this procurement process to ensure a new contract is in place by June 2025.

Prasanth Pilly made a motion to approve the release of Employer of Record (EOR)/National Dislocated Worker Grant (DWG) Request for Proposal (RFP), as presented. Kelly Johnson seconded the motion. The motion passed unanimously.

Agenda Item 11 - Review and Approve Executive Staff Holiday Gift Cards:

Brian Bauer, President/CEO, stated that per the DEO (FLORIDACOMMERCE) Grantee/Sub-Grantee Agreement, no changes to compensation for the board's executive staff are allowed without documented Board approval and must align with local policies and procedures.

Staff is asking that the committee approve Executive Staff Holiday Gift Cards equal to \$100 for Brian Bauer, President/CEO, Tracey McMorris, Vice President of Operations/COO, and Lisa Delligatti, CFO. Mr. Bauer stated that all CareerSource Research Coast staff had already received their \$100 gift cards.

Will Armstead made a motion to approve the Executive Staff Holiday Gift Cards for Mr. Bauer, Ms. Delligatti, and Ms. McMorris. The motion was seconded by Terrance Moore. The motion was passed unanimously.

Agenda Item 12 - Approved Negotiated Performance Levels - PY 2024 and PY 2025:

Brian Bauer, President/CEO, explained that the State of Florida negotiated and agreed upon levels of performance for WIOA programs and Wagner Peyser-funded activities for PYs 2024-2025 with the United States Department of Labor, Employment, and Training Administration. Once the State levels were agreed upon, CareerSource Florida (CSF) and the Department of Economic Opportunity (DEO) negotiated performance levels with each Local Workforce Development Board.

Mr. Bauer reviewed the negotiated performance levels for program years 2024 and 2025 for the Workforce Innovation and Opportunity Act (WIOA) Title I and Title III programs with committee member

Agenda Item 13 - Primary Indicators of Performance - 1st Quarter PY 2024-2025:

Brian Bauer, President/CEO, presented the Primary Indicators of Performance for the 1st Quarter of PY 2024-2025. 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% of negotiated), and those reflected in yellow still need to be met (less than 90% of negotiated) by CSRC.

Mr. Bauer presented the Statewide Indicators of Performance, which reflects the performance outcomes for all Local Workforce Development Boards (LWDBs) across the state. LWDB 20 is one of the top five performing boards.

Mr. Bauer discussed the successful negotiation of performance metrics for the 2024-2025 program years, noting the positive collaboration with Florida Commerce. The team exceeded expectations in most metrics, with a particular focus on wage targets. Mr. Bauer expressed confidence in meeting the negotiated metrics based on historical performance data.

Agenda Item 14 - One-Stop Operator Quarterly Report - 1st and 2nd Quarter - PY 2024-2025:

Glenda Harden, Workforce Coordination Consulting, LLC., provided an overview of the first quarter report, noting the relocation of the one-stop center and the shift to virtual services for partners. The MOU with the Division of Blind Services is still pending signature, with Glenda detailing the challenges faced in obtaining it. Brian Bauer added that this issue has been designated as a finding in recent monitoring, and they are preparing a response to Florida Commerce.

Eleanor Eberhart-Chin shared that the One-Stop Operator quarterly meeting was held on October 24, 2024. All partners were in attendance except for AARP and the Division of the Blind Services. Gregory McDonald, the Career Center Manager for Garden City location, did a presentation for the virtual offered by CareerSource Research Coast. The partners continue to use the Crosswalk system and referrals.

Agenda Item 15 - Workforce Readiness Taskforce Quarterly Report:

Brian Bauer, President/CEO, provided the Workforce Readiness Task Force Quarterly Report, highlighting key discussions from the last meeting. The task force analyzed the local labor market and reviewed the master's credential list, noting improvements and upcoming reviews. Additionally, they focused on identifying talent pipelines in career and technical education programs to ensure alignment with industry needs.

Agenda Item 16 - Chair's Report:

James Brann, Chair, acknowledged the importance of attendance and congratulated Helene Caseltine on her retirement, thanking her for her hard work with the board and the chamber in Vero Beach. Mr. Bauer also expressed his appreciation for Helene's dedication and mentioned coordinating a lunch to present her with a token of gratitude. Helene shared her plans to start a consulting firm post-retirement.

Agenda Item 17 - Presidents Report:

Brian Bauer, President/CEO, reported that following updates to the committee.

CareerSource Florida Board/Council Meetings:

Vice-Chair Will Armstead and Mr. Bauer will be attending the CareerSource Florida Board/Council meetings in Tallahassee February 18-20, 2025.

CareerSource Research Coast Consolidation/Reorganization Update:

Mr. Bauer shared updates on the ongoing transition to the new administrative office in Fort Pierce, noting significant progress despite delays related to electrical system modifications. He addressed updates to the organizational chart, specifically the veteran's program, which is being streamlined from five to three positions due to reduced federal funding. Mr. Bauer emphasized the importance of transitioning to consolidated positions to maintain service levels.

Update on Legislative Session and Funding Status:

Mr. Bauer provided an update on the legislative session that will begin in March and mentioned a recent executive order signed by the president that has caused some uncertainty regarding funding. He reassured the board that their programs are not affected by this order. Additionally, he noted that the reauthorization of WIOA was pulled from the continuing resolution and will be addressed in Congress within the next 100 days.

Agenda Item 18 - Open to the Board:

No Comments

Agenda Item 19 - President's Report:

No Comments

Corinne J. LaRoche, James Moore & Company, joined the meeting and provided an overview of the Financial Statement Audit Year End June 30, 2024, and the 2023-IRS Form 990 Tax Return, stating that the audit was clean with no findings and that the organization broke even for the year.

In addition, Ms. LaRoche mentioned that the 990 form, which serves as a compliance document for the IRS, mirrored the audit and contained no issues.

Agenda 20 - Adjournment:

With no further items to discuss, a motion was made by Helne Caseltine to adjourn the meeting, seconded by William Armstead. The motion passed unanimously, and the meeting was adjourned at 8:58 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
Board Secretary

Date

Next Board of Directors Meeting - April 30, 2025



Agenda Item 5b Programs and Services Meeting Minutes

February 26, 2025

Opening Remarks

1. Welcome & Attendance

Voting Items

2. Review and Approve the Acceptance of the Workforce Innovation Opportunity Act (WIOA) Youth - Incentive Payment Policy Revisions
3. Review and Approve the Acceptance of Workforce Innovation Opportunity Act (WIOA) Youth Measurable Skills Gains Policy Revisions
4. Review and Approve the Acceptance of the Workforce Innovation Opportunity Act (WIOA) Youth - Supportive Services Policy Revisions
5. Review and Approve Local Targeted Occupations List (LTOL) - 4th Quarter PY 2024-2025

Information/Discussion

6. Primary Indicators of Performance - 2nd Quarter PY 2024-2025 (Tentative)
7. 10th Annual Fort Pierce Job Fair Update
8. CareerSource Research Coast (CSRC) Programs Updates:
 - a. Wagner-Peyser, Migrant and Seasonal Farmworkers (MSFW), Reemployment Services and Eligibility Assessment (RESEA) Programs - Mary Bell
 - Wagner-Peyser
 - CAP Refresher Training
 - Monitoring Tool Training
 - RESEA
 - Staffing Updates
 - Virtual Appointments
 - MSFW
 - Minimum Service Level Indicator Report for 2nd Quarter - PY2024-2025
 - Quality Contacts/Outreach Efforts



- b. Welfare Transition (WT) Program, Supplemental Nutrition Assistance Program (SNAP), and Workforce Innovation and Opportunity Act (WIOA) Program - Kate Sayger
 - Welfare Transition/SNAP
 - Orientation/Sanction Lifts
 - Staffing Update
 - WIOA
 - Referral Process Update/Orientation
 - Expenditures
 - c. Jobs for Veterans State Grant (JVSG) Program - Shelly Batton
 - JVSG
 - Staffing Update
 - Outreach Efforts
 - Point in Time Count
 - d. Workforce Innovation and Opportunity Act (WIOA) Program - On-the-Job Training (OJT) - Christina Coble
 - WIOA OJT Year-to-Date (YTD)
 - Enrollments
 - Expenditures
9. Adjournment - Next P & S Meeting - May 28, 2025

Members Participating by Teleconference

Bob Cenk	Wayne Olson	Prashanth Pilly
Kelly Johnson	Jim Brann	Jose Capellan

Members Present

None - Virtual Only

Members Excused

Pete Tesch	Deb Frazier	David Bean
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Members Unexcused

None

Staff Present

Shelly Batton	Christina Coble	Mary Bell
Kate Sayger	Jennifer Eimann	

Call to Order

Bob Cenk, Chair, called the meeting to order at 8:05 a.m. A quorum was established.



Agenda Item 2 - Review and Approve the Acceptance of the Workforce Innovation Opportunity Act (WIOA) Youth - Incentive Payment Policy Revisions:

Kate Syger, Programs Coordinator, stated that the WIOA Youth Incentive Payment Policy had been revised.

Ms. Sayger shared that Incentives are permitted for recognition and achievements directly tied to training activities, education, and work experience for WIOA youth participants. Eckerd Connects is our current youth provider of WIOA youth services, and to align with our sub-recipient agreement for the current program year with Eckerd, staff revised the youth programs and payment policies to update the description and the requirements for our youth participants to earn an internship completion incentive to 90% completion of the total scheduled work hours as defined in the internship skills outline, not to exceed a maximum of 360 hours.

Jim Brann moved to approve the acceptance of the Workforce Innovation Opportunity Act (WIOA) Youth - Incentive Payment Policy Revisions, as presented. Prashanth Pilly seconded the motion, which passed unanimously.

Agenda Item 3 - Review and Approve the Acceptance of Workforce Innovation Opportunity Act (WIOA) Youth Measurable Skills Gains Policy Revisions:

Kate Syger, Programs Coordinator, stated that the WIOA Youth Measurable Skills Gains Policy had been revised.

Ms. Sayger explained that WIOA regulations specify that attainment of measurable skills gains, or MSGs, must be documented for WIOA youth enrolled in a training or education activity. These include training milestones, skills progression, attainment of a secondary diploma or its equivalent, gains in education and function levels, and/or secondary or post-secondary transcript report cards.

To align with the U.S. Department of Labor's TGLTN-16 change three, the WIOA Youth Program Measurable Skills Gains Policy was revised to update what is acceptable as verification of a training milestone MSG to include completion of one year of an apprenticeship training program or similar milestones. The language regarding successful completion of an exam was tightened up to document the passage of an exam required for an occupation in the skills progression type.

In addition, for the educational functioning level MSG type, the CASAS assessment was removed as the only assessment that can be used to verify this type.

Jim Brann moved to approve the acceptance of the Workforce Innovation Opportunity Act (WIOA) Youth – Measurable Skill Gains Policy Revisions, as presented. Wayne Olson seconded the motion, which passed unanimously.



Agenda Item 4 - Review and Approve the Acceptance of the Workforce Innovation Opportunity Act (WIOA) Youth - Supportive Services Policy Revisions:

Kate Syger, Programs Coordinator, stated that the WIOA Youth Supportive Services Policy had been revised.

Ms. Sayger explained that supportive services enable an individual to successfully participate in WIOA activities by helping youth participants overcome barriers to training and employment, which aligns with the Department of Labor's (DOL) Training Employment Guidance Letter.

The policy was also updated to reflect that supportive services may be provided to participants actively enrolled, participating in a training activity, or active and in follow-up, also known as the 12-month retention period, under TEGL 10-16, Change 3,

Prior to the implementation of TEGL 10-16, Change 3, youth participants were not able to receive supportive services while active and in follow-up.

Prasanth Pilly moved to approve the acceptance of the Workforce Innovation Opportunity Act (WIOA) Youth – Supportive Services Policy Revisions, as presented. Jim Brann seconded the motion, which passed unanimously.

Agenda Item 5 - Review and Approve Local Targeted Occupations List (LTOL) – 4th Quarter PY 2024-2025:

Shelly Batton, Director of Programs, presented the Local Targeted Occupations List for the 4th Quarter of PY 2024-2025.

Ms. Batton explained that the Florida Department of Commerce, Bureau of Labor Market Statistics (LMS), publishes Florida's statewide demand occupations list and local area demand occupations lists of high growth/high wage occupations annually. These lists are used by the local workforce development boards (LWDBs) to create their local targeted occupations list (LTOL). An LTOL is a list of occupations in demand based on high growth and/or high wages in the local area. Each LWDB can use LMS's demand occupations list and other resources to develop their LTOL.

Staff reviewed local labor market information and resources regarding the LTOL. There was no recommended addition of occupations to the 4th Quarter of the PY 2024-2025 list. Staff recommends approval of this LTOL for the 4th Quarter of PY 2024-2025.

Wayne Olson moved to approve the Local Targeted Occupations List (LTOL) 4th Quarter PY 2024-2025, as presented. Prashanth Pilly seconded the motion, which passed unanimously.

Agenda Item 6 - Primary Indicators of Performance 2nd Quarter - PY 2024-2025:

As of this date, no Primary Indicators of Performance for the second Quarter have been published on the state website. Therefore, none were presented at this meeting.



Agenda Item 7 - 10th Annual Fort Pierce Job Fair Update:

Christina Coble, Business Services Manager, gave an update on the City of Ft. Pierce Job Fair that took place on January 29, 2025. Ms. Coble shared the following attendee numbers:

- Sixty-Six Employers
- Twenty-two Community Partners
- Six-Hundred Job Seekers
- Forty-Six Veterans
- Six Hope Florida Participants

Ms. Coble shared that the employers took the time to vet potential candidates.

The SWOT meeting will take place on February 11, 2025, to evaluate strengths, weaknesses, areas for improvement, and threats to determine what changes can occur next year.

On February 12, 2025, the Business Services team will send surveys to the participating employers and provide the survey information to the City of Ft. Pierce.

Agenda Item 8 - CareerSource Research Coast (CSRC) Programs Updates:

a. Mary Bell, Wagner-Peyser Program Manager (Wagner-Peyser - Reemployment Services and Eligibility Assessment (RESEA) and the Migrant Seasonal Farmworker (MSFW) Programs) provided the following information:

- Wagner-Peyser: Corrective Action Plan (CAP) refresher training was conducted on December 19th in response to the FloridaCommerce January 2024 monitoring, addressing findings and non-compliance issues along with clarifications on the definitions and the implications of these terms, as well as to minimize the number of findings and other ONI issues, and to increase the awareness of the required elements when working with the clients.

Frontline staff were given training on February 5th on how to review the FloridaCommerce monitoring tool. Each staff member was tasked with monitoring a universal job seeker, MSFW job seeker, and a veteran job seeker.

- RESEA: Evans Belizaire has been hired as a RESEA Program Specialist, starting February 10, 2025. Mr. Belizaire is currently going through RESEA training plan and studying for his Tier 1 exam.
Virtual appointments have been challenging for staff because clients do not complete the Employ Florida full registration before their appointments as required. The pull count has increased to forty-nine per week because the number of reemployment claims has increased as well.
- Migrant and Seasonal Farmworkers (MSFW): Ms. Bell reviewed the MSFW Minimum Service Level Indicator Report for 2nd Quarter - PY2024-2025.



Ms. Bell stated that Indian River and St. Lucie Counties met the eight Equity Ratio Indicators. However, the counties did not meet all of the following Minimum Service Level Indicators as outlined below:

Indian River County:

- Individuals Placed in a Job (as defined in “Employment Rate 2nd Quarter After Exit”)

St. Lucie County:

- Individuals Placed in a Job (as defined in “Employment Rate 2nd Quarter After Exit”)
- Median Earnings of Individuals in Unsubsidized Employment (as defined in “Median Earnings 2nd Quarter After Exit”)
- Individuals Placed Long term in Non-agricultural Jobs (as defined in “Retention with the same Employer in the 2nd and 4th Quarter after Exit” for whom a non-agricultural industry is reported)

Ms. Bell stated that the MSFW outreach goals requiring Hector Ramirez, Migrant Seasonal Farmworker (MSFW) Outreach Coordinator, to make five quality contacts per day, has been challenging due to the lack of the MSFW population in the field.

Ms. Bell stated she has asked Brian Bauer, President/CEO, to investigate the issue and see if the other LWDBs see the same constraints. Also, Ms. Bell is seeking guidance from the state to address the decrease in migrant population.

b. Kate Sayger, Programs Coordinator (SNAP, Welfare Transition (WT), and WIOA programs), provided the following information:

- Welfare Transition (WT): St. Lucie, Martin, and Indian River counties now offer a fully automated online Welfare Transition orientation. The automation process is going very smoothly.
- SNAP: Effective December 12th, SNAP orientations and sanction lifts are held on Thursdays at 10:00 am at the satellite center in the United Against Poverty Building, Vero Beach.
- WIOA Adult/Dislocated: A new flyer was created with information on the new referral process for individuals seeking information on training services, and how to book appointments online for WIOA orientations.

Individual Training Account (ITA) Expenditures through January 2025 total \$353,211, above the \$343,400 expenditure goal established for PY24-25.

c. Shelly Batton, Director of Programs (Jobs for Veterans State Grant (JVSG) Program), provided the following information:

- JVSG: Ms. Batton shared that Joseph Svendsen, DVOP, is being transitioned into the open Consolidated DVOP-LVER Government Operations Consultant II, position. We are waiting on FloridaCommerce to complete his paperwork.



Ms. Batton explained that the DVOPs outreach efforts are being evaluated to increase the number of contacts/intakes, ensuring that we reach as many veterans as possible and provide applicable services.

The Point-in-Time (PIT) count took place on February 20, 2025. Veteran staff went out into the field and assisted with counting the homeless population.

d. Christina Coble, Business Services Manager (Workforce Innovation and Opportunity Act (WIOA) Program - On-the-Job Training (OJT), provided the following information:

On-the-Job Training (OJT) is on track regarding expenditures. In addition, an OJT opportunity with Piper Aircraft is being explored.

Cleveland Clinic Indian River Hospital and Martin Heath have finally completed the OJT agreement paperwork. As a result, we anticipate OJT opportunities which will increase the training expenditures for PY24-25.

Ms. Coble shared that Colleen Gill is screening fifteen electrician apprentices for OJT opportunities.

Ms. Coble stated there are three dual-enrolled WIOA Youth who have been placed in OJT opportunities so far this PY 24-25.

Agenda Item 9 - 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 8:53 a.m.

The next Programs and Services Committee Meeting - May 28, 2025

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 5c Executive Committee Meeting Minutes

March 14, 2025

Opening Remarks

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

Voting Items

3. Review and Approve January Financial Reports - PY2024-2025
4. Review and Approve the Acceptance of the Workforce Innovation Opportunity Act (WIOA) Youth - Incentive Payment Policy Revisions
5. Review and Approve the Acceptance of Workforce Innovation Opportunity Act (WIOA) Youth - Measurable Skills Gains Policy Revisions
6. Review and Approve the Acceptance of the Workforce Innovation Opportunity Act (WIOA) Youth - Supportive Services Policy Revisions
7. Review and Approve Local Targeted Occupations List (LTOL) - 1st Quarter PY 2024-2025

Information/Discussion

8. WIOA Primary Indicators of Performance - 2nd Quarter PY 2024-2025 (Tentative)
9. CareerSource Research Coast (CSRC) Updates - PY 2024-2025
 - CSF Network Impact Data
 - CSF Board of Directors/Council/FWDA Meetings - February 18-20, 2025
10. Adjournment - Next Executive Meeting - April 11, 2025

Members Present:

None - Virtual Only

Members Participating by Teleconference:

Werner Bols	Jim Brann	Leslie Kristof
William Armstead	Bob Cenk	Terrance Moore

Members Excused

None

Administrative Staff Present/Teleconference:

Brian Bauer	Lisa Delligatti	Jennifer Eimann
Tracey McMorris		

Call to Order:

Jim Brann, Chair, called the meeting to order at 8:08 a.m. A quorum was established.

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

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

Agenda Item 3 - Review and Approve January Financial Reports - PY 2024-2025: Lisa Delligatti, CFO, explained that the Board approved the PY 2024-2025 budget. The Executive Committee regularly reviews budgets, all amendments to the budget, and monthly expenditures.

Ms. Delligatti explained that the state ITA waiver was set at 35%. Current spending is at 47% as of January (12% over target). Ms. Delligatti stated she spoke to Christina Coble, Business Services Manager, about the need to watch training expenditures for the rest of the year to avoid overspending on training dollars. The recommendation is to pull back spending to get closer to the 35% target.

Brian Bauer, President/CEO, noted that the JVSG federal grant to the state of Florida has been reduced, and the state had to consolidate and adjust its budget to local workforce boards. As a result, LWDB 20 needed to reduce JVSG staff from five to three. Instead of workforce reduction for the fourth position, a new position called Veteran Specialist was created. The Veteran Specialist position will be funded through Wagner-Peyser 7B money instead of the federal JVSG grant.

- Current Staffing: Four total staff
 - Three funded through federal JVSG
 - One to be funded through Wagner-Peyser 7B
- Transition to Veteran Specialist will provide more flexibility as the position will not be tied strictly to federal grant guidelines
- This allows the person to perform duties outside of strict JVSG requirements

With no further discussion, a motion was made by Will Armstead to Approve the January Financial Reports - PY 2024-2025, as presented. Werner Bols seconded the motion. The motion was passed unanimously.

Agenda Item 4 - Review and Approve the Acceptance of the Workforce Innovation Opportunity Act (WIOA) Youth - Incentive Payment Policy Revisions:

Tracey McMorris, COO, stated that to align with Eckerd Connects, Inc. Subrecipient Agreement 20-002-YWS (i.e., the WIOA Youth Services Contract for PY2024-2025) that went into effect on 7/01/2024, staff revised CSRC's WIOA Youth Program Incentive Payments Policy as follows:

- Updated the description/requirements for a Youth participant to earn an internship Completion Incentive to "90% completion of the total scheduled work hours as defined in the internship skills outline not to exceed a maximum of 360 hours.

With no further discussion, a motion was made by Werner Bols to Approve the Acceptance of the Workforce Innovation Opportunity Act (WIOA) Youth - Incentive Payment Policy Revisions, as presented. Leslie Kristof seconded the motion. The motion was passed unanimously.

Agenda Item 5 - Review and Approve the Acceptance of Workforce Innovation Opportunity Act (WIOA) Youth - Measurable Skills Gains Policy Revisions:

Tracey McMorris, COO, stated that the WIOA regulations specify that attainment of measurable skill gains (MSG) must be documented for WIOA youth enrolled in a training or education activity. Measurable skill gains include training milestones, skills progression, attainment of a secondary school diploma or its equivalent, gains in educational functioning levels, and/or secondary or post-secondary transcript/report cards.

To align with the U.S. Department of Labor's Training and Employment Guidance Letter (TEGL) 10-16, Change 3, staff revised CSRC's WIOA Youth Program Measurable Skills Gains Policy as follows:

- Updated what is acceptable as verification of a Training Milestone MSG to include "...completion of one year of an apprenticeship training program, or similar milestones."
- Reworded 'successful completion of an exam' to 'documented passage of an exam required for an occupation' in the Skills Progression MSG type.
- For the Educational Functioning Level MSG type, the specification of the CASAS assessment was removed as the only assessment that can be used to verify this MSG type.

With no further discussion, a motion was made by Werner Bols to Approve the Acceptance of the Workforce Innovation Opportunity Act (WIOA) Youth - Measurable Skills Gains Policy Revisions, as presented. Bob Cenk seconded the motion. The motion was passed unanimously.

Agenda Item 6 - Review and Approve the Acceptance of the Workforce Innovation Opportunity Act (WIOA) Youth - Supportive Services Policy Revisions:

Tracey McMorris, COO, stated that the Supportive services are services that enable an individual to participate in WIOA activities. These supportive services include but are not limited to assistance with transportation, childcare, housing, health care, educational testing, work-related attire, and work-related tools. To align with the U.S. Department of Labor's Training and Employment Guidance Letter (TEGL) 10-16, Change 3, staff revised CSRC's

WIOA Youth Supportive Services Policy as follows:

- To help WIOA Youth program participants overcome barriers to employment and training services, supportive services may be provided to participants actively enrolled, participating in a training activity, or active in follow-up.
- Prior to TEGL 10-16, Change 3, youth participants were not able to receive supportive services while active in follow-up (i.e., during the 12-month retention period).

With no further discussion, a motion was made by William Armstead to Approve the Acceptance of the Workforce Innovation Opportunity Act (WIOA) Youth - Supportive Services Policy Revisions, as presented. Terrance Moore seconded the motion. The motion was passed unanimously.

Agenda Item 7 - Review and Approve Local Targeted Occupations List (LTOL) for the 4th 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 LTOL. There is no recommended addition of occupations to the 4th Quarter of the PY 2024-2025 list. Staff recommends approval of this LTOL for the 4th Quarter of PY 2024-2025.

Leslie Kristof made a motion to approve the Local Targeted Occupations List for the 4th Quarter of PY 2024-2025, as presented. Terrance Moore seconded the motion. The motion passed unanimously.

Agenda Item 8 - WIOA Primary Indicators of Performance - 2nd Quarter PY 2024-2025 (Tentative):

As of this date, no Primary Indicators of Performance for the 2nd Quarter have been published on the state website. Therefore, none were presented at this meeting.

Agenda Item 9- CareerSource Research Coast (CSRC) Updates - PY 2024-2025:

Brian Bauer, President/CEO, suggested that a poll be sent to board members asking if they could move the April 30, 2025, meeting to May 28, 2025, as he expects that the new facility will be open and an in-person board meeting could be held on that date.

In addition, Jennifer Eimann, Executive Assistant, will also send a poll to the Programs and Services committee asking them to move their scheduled meeting to May 20, 2025, to accommodate the board meeting on the 28th.

Agenda Item 10 - Adjournment:

With no further items to discuss, a motion was made by Jim Brann, to adjourn the meeting, seconded by Pamela Burchell. The motion passed unanimously, and the meeting was adjourned at 8:47 a.m.

Next Executive Committee Meeting – April 11, 2025

BOARD SECRETARY CERTIFICATION

I hereby certify 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
Staff Secretary

Date

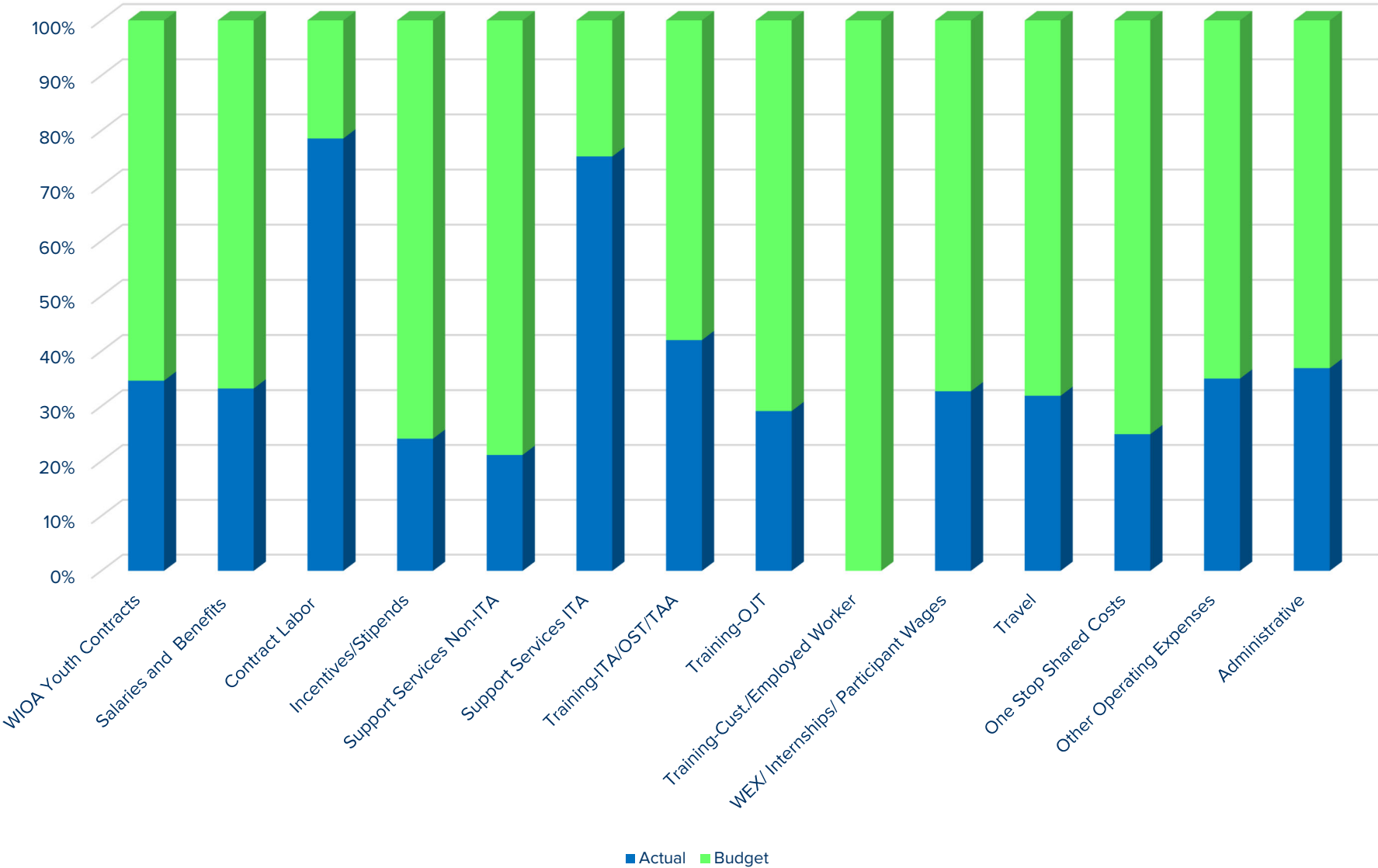
LWDB 20
Summary of Funding and Expenditures
as of January 31, 2025

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	392 DWG Helene Milton	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	\$ 445,253	\$ 50,000	\$ 963,229	\$ 80,000	\$ 63,800
PY 24-25 Supplemental		\$ -	\$ 164,384	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ (340,990)	\$ -	\$ (78,446)	\$ (91,168)	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 25-26		\$ -	\$ (323,313)	\$ (337,262)	\$ -	\$ (330,407)	\$ (93,026)	\$ (8,699)	\$ (41,090)	\$ (114,078)	\$ -	\$ (369,333)	\$ -	\$ (34,419)
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	\$ 1,388,540	\$ 942,032	\$ 170,532	\$ 223,822	\$ 261,220	\$ 59,485	\$ 58,379	\$ 461,462	\$ -	\$ 859,699	\$ 80,000	\$ 40,581
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 50,000	\$ -	\$ -	\$ -
TOTAL	\$ -	\$ 834,953	\$ 1,388,540	\$ 942,032	\$ 170,532	\$ 223,822	\$ 261,220	\$ 59,485	\$ 58,379	\$ 461,462	\$ 50,000	\$ 859,699	\$ 80,000	\$ 40,581
FUNDING DRAWN DOWN YTD	INDIRECT	10 ADULT	12 DW	11 YOUTH	17 WIOA Supplemental	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	392 DWG Helene Milton	40 WTP	470 Apprenticeship Navigator	474 Rapid Response Navigator
PY 24-25 Allocations		\$ -	\$ 10,150	\$ -	\$ 6,019	\$ 71,642	\$ 20,575	\$ 8,111	\$ 4,407	\$ 87,772	\$ 36,400	\$ 192,981	\$ 33,500	\$ 9,900
PY 24-25 Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 25-26		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 23-24		\$ 203,026	\$ 824,219	\$ 500,446	\$ -	\$ 121,177	\$ 76,500	\$ 20,463	\$ 24,529	\$ 122,540	\$ -	\$ 265,803	\$ -	\$ -
Total DEO Grant Funding		\$ 203,026	\$ 834,368	\$ 500,446	\$ 6,019	\$ 192,819	\$ 97,075	\$ 28,574	\$ 28,935	\$ 210,312	\$ 36,400	\$ 458,784	\$ 33,500	\$ 9,900
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL		\$ 203,026	\$ 834,368	\$ 500,446	\$ 6,019	\$ 192,819	\$ 97,075	\$ 28,574	\$ 28,935	\$ 210,312	\$ 72,800	\$ 458,784	\$ 33,500	\$ 9,900
% of Total Budgeted Funding Received		24.32%	60.09%	53.12%	3.53%	86.15%	37.16%	48.04%	49.56%	45.58%	145.60%	53.37%	41.88%	24.40%
EXPENDITURES														
Administrative	\$ -	\$ 23,383	\$ 86,810	\$ 11,111	\$ 10,095	\$ 63,292	\$ 13,826	\$ 3,227	\$ 3,306	\$ 28,542	\$ 6,109	\$ 67,974	\$ 4,836	\$ 1,395
Salaries and Benefits	\$ 269,228	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 126,010	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (395,238)	\$ 169,263	\$ 7,114	\$ 11,111	\$ -	\$ 7,108	\$ 13,826	\$ 3,227	\$ 3,306	\$ 28,542	\$ 6,109	\$ 67,974	\$ 4,836	\$ 1,395
Reclassification	\$ -	\$ (145,880)	\$ 79,696	\$ -	\$ 10,095	\$ 56,184	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ 205,051	\$ 744,108	\$ 485,734	\$ 843	\$ 131,037	\$ 82,847	\$ 26,660	\$ 26,968	\$ 171,595	\$ 34,088	\$ 404,984	\$ 28,420	\$ 8,378
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 424,363	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 139,204	\$ 446,534	\$ 22,094	\$ 8,862	\$ -	\$ 14,069	\$ 54,396	\$ 2,802	\$ 3,603	\$ 124,811	\$ 2,737	\$ 221,954	\$ 21,904	\$ 6,480
Contract Labor	\$ -	\$ 7,866	\$ 358	\$ -	\$ -	\$ 47	\$ 3,863	\$ 19	\$ 28	\$ 2,869	\$ 6,375	\$ 36,342	\$ 279	\$ 93
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,850	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ 525	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,316	\$ -	\$ -
Support Services ITA	\$ -	\$ 31,692	\$ 1,475	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ 191,396	\$ 2,925	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-OJT	\$ -	\$ 119,594	\$ 5,605	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 22,143	\$ -	\$ -	\$ -
Travel	\$ 297	\$ 2,616	\$ 117	\$ 529	\$ -	\$ 263	\$ 983	\$ 3,741	\$ 2,445	\$ 706	\$ 3	\$ 2,105	\$ 341	\$ 17
One Stop Shared Costs	\$ -	\$ 58,702	\$ 3,046	\$ -	\$ -	\$ 26,589	\$ 9,689	\$ 17,173	\$ 17,857	\$ 21,924	\$ 271	\$ 41,255	\$ 3,514	\$ 814
Other Operating Expenses	\$ 24,442	\$ 52,173	\$ 2,985	\$ 47,371	\$ -	\$ 13,418	\$ 8,181	\$ 1,587	\$ 1,663	\$ 9,447	\$ 25	\$ 68,968	\$ 377	\$ 395
Allocated Program Indirect	\$ (163,944)	\$ 70,210	\$ 2,951	\$ 4,609	\$ -	\$ 2,949	\$ 5,735	\$ 1,339	\$ 1,371	\$ 11,839	\$ 2,534	\$ 28,195	\$ 2,006	\$ 579
Reclassification	\$ -	\$ (776,255)	\$ 702,552	\$ -	\$ 843	\$ 73,703	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expenditures	\$ 0	\$ 228,434	\$ 830,918	\$ 496,845	\$ 10,938	\$ 194,330	\$ 96,674	\$ 29,887	\$ 30,274	\$ 200,137	\$ 40,197	\$ 472,958	\$ 33,256	\$ 9,773
Funding Over/(under) expenditures	\$ 0	\$ (25,408)	\$ 3,450	\$ 3,601	\$ (4,919)	\$ (1,511)	\$ 401	\$ (1,313)	\$ (1,339)	\$ 10,175	\$ 32,603	\$ (14,174)	\$ 244	\$ 127
YTD % of Budgeted Funds Expended		27.36%	59.84%	52.74%	6.41%	86.82%	37.01%	50.24%	51.86%	43.37%	80.39%	55.01%	41.57%	24.08%

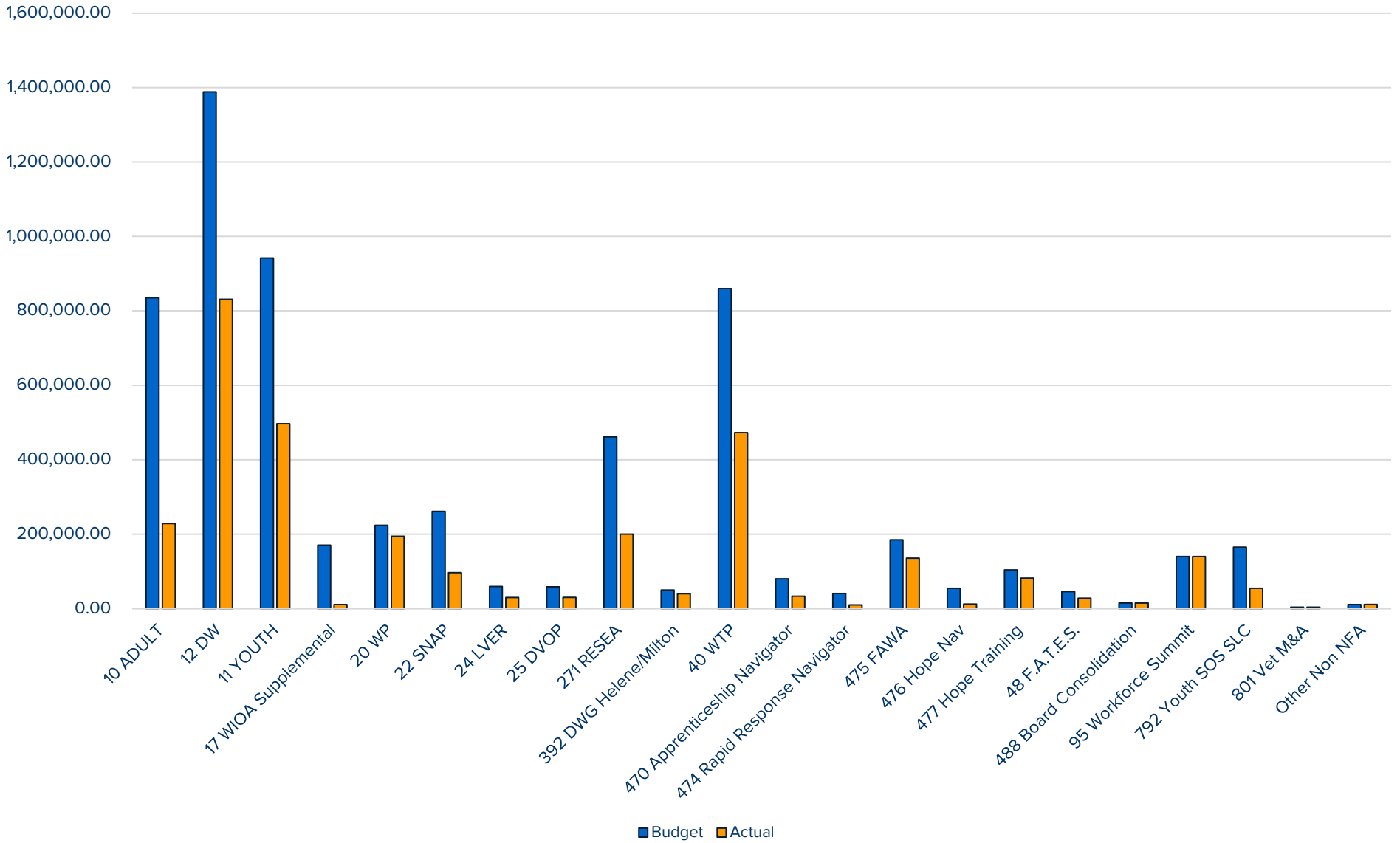
LWDB 20
Summary of Funding and Expenditures
as of January 31, 2025

PY 24-25 TOTAL AVAILABLE FUNDING	475 FAWA	476 Hope Nav	477 Hope Training	48 F.A.T.E.S.	488 Board Consolidation	801 Vet M&A	95 Workforce Summit	792 Youth SOS SLC	Other Non NFA	YEAR TO DATE TOTALS			
PY 24-25 Allocations	\$ -	\$ 54,062	\$ -	\$ -	\$ 15,000	\$ 4,008	\$ 140,000	\$ -	\$ -		\$ 5,608,689		
PY 24-25 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 164,384		
Additional Funds/Incentives	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -		
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ (510,604)		
Carryforward to PY 25-26	\$ (794,777)	\$ (29,278)	\$ -	\$ (89,054)	\$ -	\$ -	\$ -	\$ -	\$ -		\$ (2,564,736)		
Carryforward from PY 23-24	\$ 979,600	\$ 30,000	\$ 104,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 3,127,585		
Total DEO Grant Funding	\$ 184,823	\$ 54,784	\$ 104,000	\$ (89,054)	\$ 15,000	\$ 4,008	\$ 140,000	\$ -	\$ -		\$ 5,794,265		
OTHER NON DEO REVENUES	\$ -	\$ -	\$ -	\$ 135,000	\$ -	\$ -	\$ -	\$ 165,000	\$ 10,757		\$ 360,757		
TOTAL	\$ 184,823	\$ 54,784	\$ 104,000	\$ 45,946	\$ 15,000	\$ 4,008	\$ 140,000	\$ 165,000	\$ 10,757	\$ -	\$ 6,155,022		
FUNDING DRAWN DOWN YTD	475 FAWA	476 Hope Nav	477 Hope Training	48 F.A.T.E.S.	488 Board Consolidation	801 Vet M&A	95 Workforce Summit	792 Youth SOS SLC	Other Non NFA	PY 24-25 Actual	PY 24-25 Budget	VARIANCE	% Expended
PY 24-25 Allocations	\$ -	\$ -	\$ -	\$ -	\$ 15,000	\$ 4,008	\$ 139,434	\$ -	\$ -	\$ 639,899	\$ 5,608,689	\$ 4,968,790	11.409%
PY 24-25 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 164,384	\$ 164,384	0.000%
Additional Funds/Incentives	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (510,604)	\$ (510,604)	
Carryforward to PY 25-26	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (2,564,736)	\$ (2,564,736)	
Carryforward from PY 23-24	\$ 124,563	\$ 10,523	\$ 75,965	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,369,754	\$ 3,127,585		
Total DEO Grant Funding	\$ 124,563	\$ 10,523	\$ 75,965	\$ -	\$ 15,000	\$ 4,008	\$ 139,434	\$ -	\$ -	\$ 3,009,653	\$ 5,794,265		
OTHER NON DEO REVENUES	\$ -	\$ -	\$ -	\$ 135,239	\$ -	\$ -	\$ -	\$ 46,425	\$ 26,889	\$ 208,553	\$ 360,757	\$ 152,204	57.810%
TOTAL	\$ 124,563	\$ 10,523	\$ 75,965	\$ 135,239	\$ 15,000	\$ 8,016	\$ 139,434	\$ 46,425	\$ 26,889	\$ 3,218,206	\$ 6,155,022	\$ 2,936,817	52.286%
% of Total Budgeted Funding Received	67.40%	19.21%	73.04%	294.34%	100.00%	200.00%	99.60%	28.14%	249.97%	52.29%			
EXPENDITURES										PY 24-25 Actual	PY 24-25 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ 20,025	\$ 1,746	\$ 11,831	\$ 4,243	\$ 2,335	\$ -	\$ 21,334	\$ 8,179	\$ 1,639	\$ 395,238	\$ 674,672	\$ 279,435	58.58%
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 269,228	\$ 511,554	\$ 242,326	52.63%
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 126,010	\$ 163,118	\$ 37,108	77.25%
Allocated Indirect Costs	\$ 20,025	\$ 1,746	\$ 11,831	\$ 4,243	\$ 2,430	\$ -	\$ 21,334	\$ 8,179	\$ 1,639	\$ (0)	\$ 0	\$ 0	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ (95)	\$ -	\$ -	\$ -	\$ -	\$ (0)	\$ -	\$ (0)	
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Program Training	\$ 115,716	\$ 10,328	\$ 70,244	\$ 23,882	\$ 12,665	\$ 4,008	\$ 118,588	\$ 46,465	\$ 9,401	\$ 2,762,013	\$ 5,473,288	\$ 2,711,275	50.5%
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 424,363	\$ 800,000	\$ 375,637	53.0%
Salaries and Benefits	\$ 51,749	\$ 8,096	\$ 52,656	\$ 2,715	\$ -	\$ -	\$ -	\$ 1,055	\$ 2,880	\$ 1,188,601	\$ 2,386,589	\$ 1,197,989	49.8%
Contract Labor	\$ 1,180	\$ 68	\$ 867	\$ 46	\$ -	\$ -	\$ -	\$ 1,751	\$ -	\$ 62,049	\$ 16,903	\$ (45,146)	367.1%
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,850	\$ 12,126	\$ 8,276	31.7%
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,841	\$ 10,600	\$ 7,759	26.8%
Support Services ITA	\$ -	\$ -	\$ -	\$ -	\$ 1,942	\$ -	\$ -	\$ -	\$ -	\$ 35,109	\$ 11,500	\$ (23,609)	305.3%
Training-ITA/OST/TAA	\$ -	\$ -	\$ -	\$ -	\$ 16,631	\$ -	\$ -	\$ -	\$ -	\$ 210,952	\$ 290,957	\$ 80,006	72.5%
Training-OJT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 125,199	\$ 304,638	\$ 179,439	41.1%
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 50,000	\$ 50,000	0.0%
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 38,944	\$ -	\$ 61,087	\$ 125,421	\$ 64,334	48.7%
Travel	\$ 549	\$ 19	\$ 907	\$ 8	\$ -	\$ -	\$ -	\$ 51	\$ 10	\$ 15,706	\$ 33,500	\$ 17,794	46.9%
One Stop Shared Costs	\$ 8,846	\$ 780	\$ 9,964	\$ 412	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 220,836	\$ 665,167	\$ 444,331	33.2%
Other Operating Expenses	\$ 45,086	\$ 641	\$ 942	\$ 368	\$ 12,500	\$ 4,008	\$ 109,739	\$ 1,271	\$ 5,831	\$ 411,420	\$ 762,562	\$ 351,142	54.0%
Allocated Program Indirect	\$ 8,306	\$ 724	\$ 4,908	\$ 1,760	\$ 1,008	\$ -	\$ 8,849	\$ 3,392	\$ 680	\$ (0)	\$ 3,324	\$ -	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ (843)	\$ -	\$ -	\$ -	\$ -	\$ 0	\$ -	\$ 0	
Total Expenditures	\$ 135,742	\$ 12,074	\$ 82,075	\$ 28,125	\$ 15,000	\$ 4,008	\$ 139,922	\$ 54,644	\$ 11,040	\$ 3,157,251	\$ 6,147,960	\$ 2,990,710	51.4%
Funding Over/(under) expenditures	\$ (11,178)	\$ (1,551)	\$ (6,110)	\$ 107,113	\$ -	\$ 4,008	\$ (488)	\$ (8,219)	\$ 15,849	\$ 60,955			
YTD % of Budgeted Funds Expended	73.44%	22.04%	78.92%	61.21%	100.00%	100.00%	99.94%	33.12%	102.63%	51.30%			

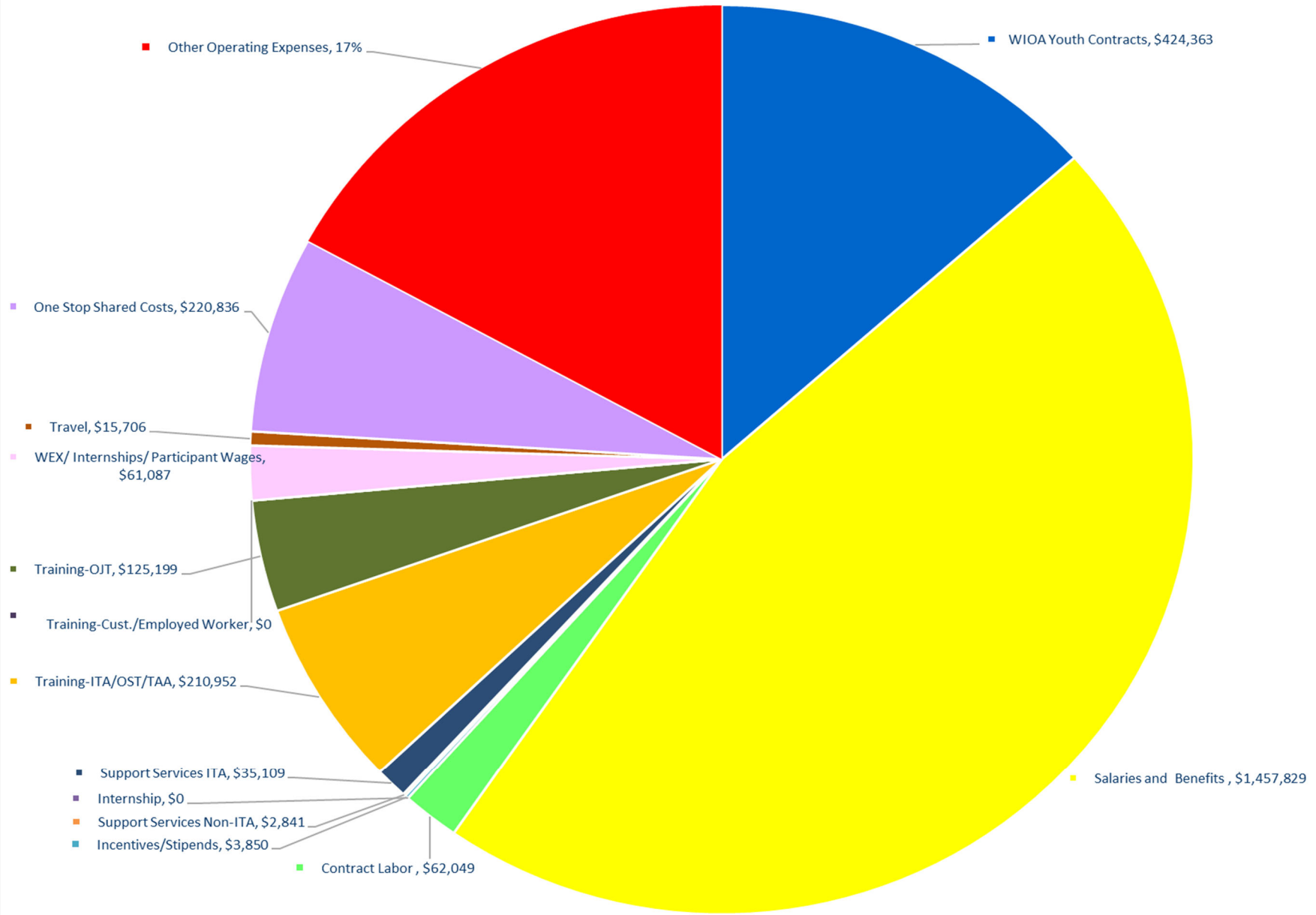
Expenditures by Category



Budget to Actual by Program



Expenditure Categories



Workforce Development Board of the Treasure Coast, Inc.
Statement of Financial Position
As of 1/31/2025

	<u>Current Year</u>
Assets	
Current assets	
Cash - Accounts Payable	5,212.59
Cash - Payroll	25,930.43
Cash - Business	369,734.74
Checking W/Int.	
Accounts Receivable	111.03
Customers	
Accounts Receivable -	969.62
Other	
Grants Receivable	(91.58)
Prepaid Expenses	36,798.37
Deposits	7,367.08
Due TO/ Due FROM	2,137.61
Total Current assets	448,169.89
Non-current assets	
Data Processing	119,215.39
Vehicles	447,386.10
Lease Assets - Building	3,719,789.00
Lease Assets -	248,370.00
Leasehold Improvements	217,855.62
Accumulated	(711,185.63)
Accumulated	(1,515,593.00)
Other Assets	24,240.00
Total Non-current assets	2,550,077.48
Total Assets	2,998,247.37
Liabilities & Net Assets	
Current Liabilities	
Accounts Payable	17,677.07
Accrued Expenses	56,060.93
Federal Withholding Tax	(2,107.94)
FICA Payable	2,108.53
SUTA Payable	378.42
Principal Insurance	254.07
Health Insurance Payable	1,989.80
AFLAC Payable	77.92
Legal Shield	222.61
	<u>Current Year</u>
Workers Comp Payable	5,944.22
Accrued Leave	101,681.04
Lease Interest Payable	5,257.00
Refundable Advances	1,844.19
Deferred Revenue	855.00
Total Current Liabilities	192,242.86
Non-current liabilities	
Short-term Lease Liability	316,523.00
Long-term Lease Liability	2,650,628.00
Lease Liability Offset	(316,523.00)
Total Non-current liabilities	2,650,628.00
Net Assets	
Beginning of Year	1,032,582.20
Current Year	(877,205.69)
Total Net Assets	155,376.51
Total Liabilities & Net Assets	2,998,247.37

AGENDA ITEM SUMMARY

Title	Review and Approve Workforce Innovation Opportunity Act (Act) - Youth Program Incentive Payments Policy Revisions
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Title 20 Code of Federal Regulations, Section 681.640; U.S. Department of Labor's Training and Employment Guidance Letter (TEGL) 21-16.
Action Requested	Review and Approve Revisions to CSRC's Workforce Innovation Opportunity Act (Act) - Youth Program's Incentive Payments Policy
Background	<p>WIOA regulations authorize the use of incentive payments for youth participants. Unlike supportive services, incentives are permitted for recognition and achievements directly tied to training activities, education, and work experience. In addition, Local Workforce Development Boards may determine the value of the incentive payments and create policies related to their use. Achievements completed prior to WIOA Youth enrollment do not qualify for incentives.</p> <p>Opportunities for WIOA Youth to earn incentives must be outlined in writing and reviewed with the participant to ensure a thorough understanding of program requirements. Supporting documentation of the activities completed or milestones achieved must be documented in the participant's file as verification of achievement.</p> <p>To align with Eckerd Connects, Inc. Subrecipient Agreement 20-002-YWS (i.e., the WIOA Youth Services Contract for PY2024-2025) that went into effect on 7/01/2024, staff revised CSRC's WIOA Youth Program Incentive Payments Policy as follows:</p> <ul style="list-style-type: none">Updated the description/requirements for a Youth participant to earn an Internship Completion Incentive to "90% completion of the total scheduled work hours as defined in the internship skills outline not to exceed a maximum of 360 hours."
Staff Recommendations	Review and Approve the Revisions to the WIOA - Youth Program Incentive Payments Policy
Supporting Material	WIOA Youth Program Incentive Payments Policy Revisions
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com 1-866-482-4473 ext. 418

PURPOSE

To establish a uniform standard for providing incentive payments to Workforce Innovation and Opportunity Act (WIOA) Youth Program participants of CareerSource Research Coast (CSRC).

REFERENCE

20 CFR 681.640. U.S. Department of Labor Training and Employment Guidance Letter No. 21-16.

BACKGROUND

WIOA regulations authorize the use of incentive payments for youth participants. Unlike supportive services, incentives are permitted for recognition and achievements directly tied to training activities, education, and work experience. In addition, Local Workforce Development Boards may determine the value of the incentive payments and create policies related to their use. Achievements completed prior to WIOA Youth enrollment do not qualify for incentives.

Opportunities for WIOA Youth to earn incentives must be outlined in writing and reviewed with the participant to ensure a thorough understanding of program requirements. Supporting documentation of the activities completed or milestones achieved must be documented in the participant's file as verification of achievement.

LOCAL POLICY

For CSRC, In-School Youth (ISY) participants are limited to maximum incentives earnings of \$600 and Out-of-School Youth (OSY) participants are limited to maximum incentives earnings of \$650 per program year. If extenuating circumstances require funding in excess of the allowable limits, exceptions may be made upon request by the WIOA Youth Program Manager to the CSRC staff overseeing the WIOA Youth Workforce Service Contract and approved by CSRC's Chief Financial Officer.

Incentive payments are based on the availability of funding and may be declined, adjusted, and/or discontinued due to changes in funding, budgets, and contracts, without notice. A participant's lack of satisfactory performance/progress or disciplinary issues may delay receipt of any/all incentives until resolved.

CSRC offers the incentives listed below to WIOA Youth participants as determined allowable and upon meeting the requirements listed for each. Complete details regarding specific requirements for each may be found on the OSY Youth Connections Incentive Sheet and ISY Youth Connections Incentive Sheet.

Type	Description	Value	Limit Per Program Year	ISY, OSY, or Both
Successful Grade Report	Submission of end of term grade report reflecting satisfactory progress in a current education program.	\$25	Two	ISY
Success in Education	Attainment of Dean's List, Honor Roll, or Perfect Attendance reports in conjunction with a successful grade report.	\$50	One	ISY
YESS Class Completion	Completion of core modules of the YESS Work Readiness curriculum.	\$100	One	Both

Type	Description	Value	Limit Per Program Year	ISY, OSY, or Both
Job Shadowing	Completion of a minimum of 10 (for ISY) 12 (for OSY) documented hours “shadowing” a professional in the industry or field identified in the participant’s career plan.	\$75 - OSY \$50- ISY	One - OSY Two - ISY	Both
Internship Completion	Completion of an internship working 140 hours- minimum to 192 hours maxi 90% completion of the total scheduled work hours as defined in the internship skills outline not to exceed a maximum of 360 hours.	\$150	One	Both
Basic Skills Upgrade	Increase of at least one Educational Functioning Level. Must be basic skills deficient at the time of enrollment.	\$50 - OSY \$25 - ISY	Two	Both
Credentialing – Long term Occupational Skills Credential	Attainment of a state or nationally recognized certification requiring long-term academic or occupational skills upgrades/training.	\$100	One	Both
Credentialing – GED/High School Diploma	Attainment of a state or nationally recognized high school diploma or GED.	\$200 -OSY \$150 - ISY	One	Both
Financial Literacy	Completion of an assigned financial literacy course.	\$25	One	Both
Leadership/ Entrepreneurial Project	Planning and execution of an approved leadership/entrepreneurial project.	\$25	One	Both
Education Exploration	Completion of at least one higher education institution visit.	\$25	One	Both
Youth Positive Outcome	Participant must be (a) employed (15 hours or more per week), enter post-secondary education, state approved apprenticeship training, or military, (b) earn a credential if enrolled in a training activity, (c) complete at least one measurable skill gain and complete at least one Basic Skills upgrade (if applicable).	\$150	One	Both
2nd Quarter Employment Retention	Verification of employment or school attendance during the second quarter after program exit.	\$75	One	Both
4th Quarter Employment Retention	Verification of employment or school attendance during the fourth quarter after program exit.	\$75	One	Both

Referenced Documents:

OSY Youth Connections Incentive Sheet
ISY Youth Connections Incentive Sheet
WIOA Youth Incentive Payments Procedure

PURPOSE

To establish a uniform standard for providing incentive payments to Workforce Innovation and Opportunity Act (WIOA) Youth Program participants of CareerSource Research Coast (CSRC).

REFERENCE

20 CFR 681.640. U.S. Department of Labor Training and Employment Guidance Letter No. 21-16.

BACKGROUND

WIOA regulations authorize the use of incentive payments for youth participants. Unlike supportive services, incentives are permitted for recognition and achievements directly tied to training activities, education, and work experience. In addition, Local Workforce Development Boards may determine the value of the incentive payments and create policies related to their use. Achievements completed prior to WIOA Youth enrollment do not qualify for incentives.

Opportunities for WIOA Youth to earn incentives must be outlined in writing and reviewed with the participant to ensure a thorough understanding of program requirements. Supporting documentation of the activities completed or milestones achieved must be documented in the participant's file as verification of achievement.

LOCAL POLICY

For CSRC, In-School Youth (ISY) participants are limited to maximum incentives earnings of \$600 and Out-of-School Youth (OSY) participants are limited to maximum incentives earnings of \$650 per program year. If extenuating circumstances require funding in excess of the allowable limits, exceptions may be made upon request by the WIOA Youth Program Manager to the CSRC staff overseeing the WIOA Youth Workforce Service Contract and approved by CSRC's Chief Financial Officer.

Incentive payments are based on the availability of funding and may be declined, adjusted, and/or discontinued due to changes in funding, budgets, and contracts, without notice. A participant's lack of satisfactory performance/progress or disciplinary issues may delay receipt of any/all incentives until resolved.

CSRC offers the incentives listed below to WIOA Youth participants as determined allowable and upon meeting the requirements listed for each. Complete details regarding specific requirements for each may be found on the OSY Youth Connections Incentive Sheet and ISY Youth Connections Incentive Sheet.

Type	Description	Value	Limit Per Program Year	ISY, OSY, or Both
Successful Grade Report	Submission of end of term grade report reflecting satisfactory progress in a current education program.	\$25	Two	ISY
Success in Education	Attainment of Dean's List, Honor Roll, or Perfect Attendance reports in conjunction with a successful grade report.	\$50	One	ISY
YESS Class Completion	Completion of core modules of the YESS Work Readiness curriculum.	\$100	One	Both

Type	Description	Value	Limit Per Program Year	ISY, OSY, or Both
Job Shadowing	Completion of a minimum of 10 (for ISY) 12 (for OSY) documented hours “shadowing” a professional in the industry or field identified in the participant’s career plan.	\$75 - OSY \$50- ISY	One - OSY Two - ISY	Both
Internship Completion	90% completion of the total scheduled work hours as defined in the internship skills outline not to exceed a maximum of 360 hours.	\$150	One	Both
Basic Skills Upgrade	Increase of at least one Educational Functioning Level. Must be basic skills deficient at the time of enrollment.	\$50 - OSY \$25 - ISY	Two	Both
Credentialing – Long term Occupational Skills Credential	Attainment of a state or nationally recognized certification requiring long-term academic or occupational skills upgrades/training.	\$100	One	Both
Credentialing – GED/High School Diploma	Attainment of a state or nationally recognized high school diploma or GED.	\$200 -OSY \$150 - ISY	One	Both
Financial Literacy	Completion of an assigned financial literacy course.	\$25	One	Both
Leadership/ Entrepreneurial Project	Planning and execution of an approved leadership/entrepreneurial project.	\$25	One	Both
Education Exploration	Completion of at least one higher education institution visit.	\$25	One	Both
Youth Positive Outcome	Participant must be (a) employed (15 hours or more per week), enter post-secondary education, state approved apprenticeship training, or military, (b) earn a credential if enrolled in a training activity, (c) complete at least one measurable skill gain and complete at least one Basic Skills upgrade (if applicable).	\$150	One	Both
2nd Quarter Employment Retention	Verification of employment or school attendance during the second quarter after program exit.	\$75	One	Both
4th Quarter Employment Retention	Verification of employment or school attendance during the fourth quarter after program exit.	\$75	One	Both

Referenced Documents:

OSY Youth Connections Incentive Sheet
ISY Youth Connections Incentive Sheet
WIOA Youth Incentive Payments Procedure

AGENDA ITEM SUMMARY

Title	Review and Approve Workforce Innovation Opportunity Act (Act) - Youth Program Measurable Skill Gains Policy Revisions
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Section 129 of the Workforce Innovation & Opportunity Act (WIOA); Florida Department of Economic Opportunity Measurable Skill Gains Resource Guide (December 2020); CareerSource Florida Administrative Policy Number 109; TEGL 10-16, Change 3.
Action Requested	Review and Approve Revisions to Workforce Innovation Opportunity Act (Act) - Youth Program's Measurable Skill Gains Policy
Background	<p>WIOA regulations specify that attainment of measurable skill gains (MSG) must be documented for WIOA youth enrolled in a training or education activity. Measurable skill gains include training milestones, skills progression, attainment of a secondary school diploma or its equivalent, gains in educational functioning levels, and/or secondary or postsecondary transcript/report cards.</p> <p>To align with U.S. Department of Labor's Training and Employment Guidance Letter (TEGL) 10-16, Change 3, staff revised CSRC's WIOA Youth Program Measurable Skills Gains Policy as follows:</p> <ul style="list-style-type: none"> • Updated what is acceptable as verification of a Training Milestone MSG to include "...completion of one year of an apprenticeship training program, or similar milestones." • Reworded 'successful completion of an exam' to 'documented passage of an exam required for an occupation' in the Skills Progression MSG type. • For the Educational Functioning Level MSG type, removed specification of CASAS assessment as the only assessment that can be used to verify this MSG type.
Staff Recommendations	Review and Approve the Revisions to the WIOA Youth Program Measurable Skills Gain Policy
Supporting Material	WIOA Youth Program Measurable Skills Gain Policy Revisions
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com 1-866-482-4473 ext. 418</p>



WORKFORCE INNOVATION & OPPORTUNITY ACT YOUTH
MEASURABLE SKILL
GAINS INCENTIVE PAYMENTS POLICY
ORIGINAL APPROVAL DATE:
12/19/2018 4/7/2021

PURPOSE

To provide guidance to the Workforce Innovation and Opportunity Act (WIOA) Youth Program on the measurable skill gains requirement for WIOA Youth participants.

REFERENCES

Section 129 of the Workforce Innovation and Opportunity Act; Florida Department of Economic Opportunity Measurable Skill Gains Resource Guide (December 2020), Employment and Training Administration, United States Department of Labor, U.S. Department of Labor Training and Employment Guidance Letter No. TEGL 10-16 Change 3.

BACKGROUND

WIOA regulations specify that attainment of measurable skill gains must be documented for WIOA youth enrolled in a training or education activity. ~~Measurable skill~~ Measurable skill gains include training milestones, skills progression, attainment of a secondary school diploma or its equivalent, gains in educational functioning levels, and/or secondary or postsecondary transcript/report cards.

FSDF

Training Milestone

Evaluations completed by an employer or training provider documenting the achievement of established milestones ~~such as completion of~~ on-the-job training (OJT), completion of one year of an apprenticeship training program, or similar milestones, period. Employer/training provider evaluations completed during job shadowing activities or work experience/internship activities cannot be utilized to document a training milestone measurable skill gain.

Skills Progression

~~Documented passage of an exam required for an occupation, or showing the successful completion of an exam required for an occupation,~~ satisfactory attainment of an element on 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

Documentation showing achievement of at least one educational functioning level of a participant who is receiving instruction below the postsecondary education level.

Secondary or Postsecondary Transcript/Report Card

Report card/transcript for one semester showing the youth is achieving academic standards. Secondary school credits or secondary school Carnegie credits may be accepted.

A minimum of one measurable skill gain in any category must be attained for each participant enrolled in a training or education activity each program year of enrollment until the training or education activity is closed.

Referenced Documents

WIOA Youth - Measurable Skills Gains Procedure

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

WIOA Youth - Measurable Skill Gains Policy- April 30, 2025 Revised November July 2024

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WORKFORCE INNOVATION & OPPORTUNITY ACT YOUTH
MEASURABLE SKILL
GAINS INCENTIVE PAYMENTS POLICY

ORIGINAL APPROVAL DATE:
12/19/201807/2021

~~An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.~~

~~WIOA Youth - Measurable Skill Gains Policy- Revised July 2024~~
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~~An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.~~

~~WIOA Youth - Measurable Skill Gains Policy- April 30, 2025~~~~Revised November~~~~July 2024~~

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PURPOSE

To provide guidance to the Workforce Innovation and Opportunity Act (WIOA) Youth Program on the measurable skill gains requirement for WIOA Youth participants.

REFERENCES

Section 129 of the Workforce Innovation and Opportunity Act, Florida Department of Economic Opportunity Measurable Skill Gains Resource Guide (December 2020), Employment and Training Administration, United States Department of Labor, U.S. Department of Labor Training and Employment Guidance Letter No. TEGL 10-16 Change 3.

BACKGROUND

WIOA regulations specify that attainment of measurable skill gains must be documented for WIOA youth enrolled in a training or education activity. Measurable skill gains include training milestones, skills progression, attainment of a secondary school diploma or its equivalent, gains in educational functioning levels, and/or secondary or postsecondary transcript/report cards.

- **Training Milestone**
Evaluations completed by an employer or training provider documenting the achievement of established milestones such as completion of on-the-job training (OJT), completion of one year of an apprenticeship training program, or similar milestones. Employer/training provider evaluations completed during job shadowing activities or work experience/internship activities cannot be utilized to document a training milestone measurable skill gain.
- **Skills Progression**
Documented passage of an exam required for an occupation, satisfactory attainment of an element on 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**
Documentation showing achievement of at least one educational functioning level of a participant who is receiving instruction below the postsecondary education level.
- **Secondary or Postsecondary Transcript/Report Card**
Report card/transcript for one semester showing the youth is achieving academic standards. Secondary school credits or secondary school Carnegie credits may be accepted.

A minimum of one measurable skill gain in any category must be attained for each participant enrolled in a training or education activity each program year of enrollment until the training or education activity is closed.

Referenced Documents

WIOA Youth - Measurable Skills Gains Procedure

AGENDA ITEM SUMMARY

Title	Review and Approve WIOA Workforce Innovation Opportunity Act (Act) - Youth Program Supportive Services Policy Revisions
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Section 129 of the Workforce Innovation & Opportunity Act (WIOA); CareerSource Florida Administrative Policy Number 109; TEGL 10-16, Change 3.
Action Requested	Review and Approve Revisions to Workforce Innovation Opportunity Act (Act) - Youth Program's Supportive Services Policy
Background	<p>Supportive services, one of the fourteen program elements for the WIOA Youth program, are services that enable an individual to participate in WIOA activities. These supportive services include but are not limited to assistance with transportation, childcare, housing, health care, educational testing, work-related attire, and work-related tools.</p> <p>To align with U.S. Department of Labor's Training and Employment Guidance Letter (TEGL) 10-16, Change 3, staff revised CSRC's WIOA Youth Supportive Services Policy as follows:</p> <ul style="list-style-type: none"> To help WIOA Youth program participants overcome barriers to employment and training services, supportive services may be provided to participants actively enrolled, participating in a training activity, or active in follow up. <ul style="list-style-type: none"> Prior to TEGL 10-16, Change 3, youth participants were not able to receive supportive services while active in follow up (i.e., during the 12-month retention period).
Staff Recommendations	Approve the Revisions to the WIOA Youth Program Supportive Services Policy
Supporting Material	WIOA Youth Program Supportive Services Policy Revisions
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com 1-866-482-4473 ext. 418</p>



WORKFORCE INNOVATION & OPPORTUNITY ACT - YOUTH
SUPPORTIVE SERVICES POLICY
ORIGINAL APPROVAL DATE: 3/28/2018
REVISION DATE: 07/17/2024
BOARD EFFECTIVE DATE: 02/26/2025

PURPOSE

To establish a uniform standard for providing supportive services to Workforce Innovation & Opportunity Act (WIOA) Youth program participants of CareerSource Research Coast (CSRC). To avoid duplication, WIOA Youth Program staff shall coordinate and provide cost-effective support services to participants by either connecting participants to other resources or when appropriate WIOA funding is available. CSRC shall authorize supportive services when a participant demonstrates ~~the financial~~ need, when the participant will not be successful without the support, and when no alternative funding is available to pay for such supportive services.

REFERENCES

Section 129 of the Workforce Innovation & Opportunity Act; U.S. Department of Labor - Training and Employment Guidance Letter (TEGL) 10-16, Change 3; WIOA Desk Reference - Supportive Services, June 2017 Edition; CareerSource Florida Administrative Policy 109; Employment and Training Administration, United States Department of Labor, U.S. Department of Labor Training and Employment Guidance Letter No. TEGL 21-16, and CareerSource Florida Administrative Policy No. 109.

BACKGROUND

Supportive services, one of the fourteen program elements for the WIOA Youth program, are services that enable an individual to participate in WIOA activities. These supportive services include but are not limited to assistance with transportation, childcare, housing, health care, educational testing, work-related attire, and work-related tools.

LOCAL POLICY

To help WIOA Youth program participants overcome barriers to employment and training services, supportive services may be provided to ~~participants~~ youth actively enrolled, and participating in a training activity, or active in follow up. Staff must assess the ~~participant's youth's~~ financial need for supportive services during the initial objective assessment and throughout the ~~participant's youth's~~ enrollment in career or training services. WIOA-funded supportive services may be provided to ~~the participant~~ youth only after staff ~~has~~ have determined and appropriately documented the following:

- Supportive services are necessary for the ~~participant~~ youth to complete ~~the in~~ WIOA career or training services.
- The identified supportive service is not available through other agencies, programs, or ~~services~~ resources.
 - If available through other sources, staff must document how/why referrals to other agencies for the supportive service would create a hardship for the participant.
- ~~Determination of Staff has documented the~~ need for the supportive service ~~is included~~ in the participant's Individual Service Strategy (ISS) OR Individual Employment Plan (IEP). ~~An explanation regarding the participant's need for supportive service must be included in the participant's case notes in Employ Florida.~~
- ~~P~~WIOA Youth participant has completed and signed a ~~Determination Statement of Need for Supportive Services Statement Form~~ documenting the financial need for support ~~and a Receipt of Supportive Service form with the cost of the requested supportive services~~. A copy of the form must be maintained in the participant's case file.
- ~~The completion of a~~ Receipt of Supportive Services form documenting ~~with the cost, purpose and need for the requested supportive service.~~

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.
WIOA Youth - Support Service Policy Revised July 2024

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WORKFORCE INNOVATION & OPPORTUNITY ACT - YOUTH
SUPPORTIVE SERVICES POLICY
ORIGINAL APPROVAL DATE: 3/28/2018
REVISION DATE: 07/17/2024
BOARD EFFECTIVE DATE: ~~02/26/2025~~ 02/28/2024

- ~~along with a~~ The record of payment will be included in the ~~participants~~ participant's case file.
- Staff ~~will enter~~ ~~has recorded~~ the appropriate ~~service~~ code in the State's Management Information System, Employ Florida, along with a supporting case note documenting the need for the supportive service, as reflected in the ~~ISS or~~ IEP.

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Staff must ensure ~~supportive~~ the supportive services provided are used for their intended purpose and must not be issued to a third party on behalf of the WIOA Youth participant. Supportive services are purchased directly from the appropriate vendor; CSRC does not reimburse ~~the participant~~ youth for ~~costs~~ the costs incurred. The availability of supportive services may vary with each program year and is based on WIOA Youth Program funding ~~availability~~.

WORKFORCE INNOVATION & OPPORTUNITY ACT – YOUTH
SUPPORTIVE SERVICES POLICY
ORIGINAL APPROVAL DATE: 03/25/2018
REVISION DATE: 01/21/2025
BOARD EFFECTIVE DATE: 4/30/2025

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Due to limited WIOA Youth program funding, CSRC does not regularly authorize supportive service payments for housing expenses, childcare/dependent care, legal fees, fines, late fees, court costs, or any item not listed in the chart below. However, requests for support services not listed may be approved by the WIOA Youth Program Manager.

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SUPPORT SERVICE LIMITATIONS PER YOUTH PER PROGRAM YEAR		
Support Service	Cost Limitation	Quantity Limitation
Uniforms	\$100.00	2 Tops, 2 Bottoms
Shoes	\$50.00	One Pair
Safety Steel Toe Boots	\$75.00	One Pair
Interview Attire	\$100.00	2 Tops, 2 Bottoms
Tools	\$100.00	No Quantity Limitation
Background Screening	\$100.00	No Quantity Limitation
Physicals/Drug Screening	\$100.00	No Quantity Limitation
Bus Passes	\$35.00	One Book Per Month Maximum
Gas Cards/Uber Cards	Based on Mileage, Not to Exceed \$50.00	One Per Month Maximum
Educational Testing, Licensing Fees, Required Textbooks	\$300.00	No Quantity Limitation
Required Accommodations for Youth with Disabilities	No <u> </u> -Predetermined- Limit - Based on Documentation of Need and <u> </u> -Manager approval	No Quantity Limitation
Driver's License, Permit, State ID	No Predetermined Limit. Based on actual cost.	No Quantity Limitation

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Reference Documents:

WIOA Youth - Supportive Services Procedure

[An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.](#)

[WIOA Youth Supportive Services Policy – April 30, February 2025](#)

Page 3 of 3



PURPOSE

To establish a uniform standard for providing supportive services to Workforce Innovation & Opportunity Act (WIOA) Youth program participants of CareerSource Research Coast (CSRC). To avoid duplication, WIOA Youth Program staff shall coordinate and provide cost-effective support services to participants by either connecting participants to other resources or when appropriate WIOA funding is available. CSRC shall authorize 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 such supportive services.

REFERENCES

Section 129 of the Workforce Innovation & Opportunity Act. U.S. Department of Labor Training and Employment Guidance Letter (TEGL) 10-16, Change 3. WIOA Desk Reference - Supportive Services, 2024 Edition.
CareerSource Florida Administrative Policy 109.

BACKGROUND

Supportive services, one of the fourteen program elements for the WIOA Youth program, are services that enable an individual to participate in WIOA activities. These supportive services include but are not limited to assistance with transportation, childcare, housing, health care, educational testing, work-related attire, and work-related tools.

LOCAL POLICY

To help WIOA Youth program participants overcome barriers to employment and training services, supportive services may be provided to participants actively enrolled, participating in a training activity, or active in follow up. Staff must assess the participant's financial need for supportive services during the initial objective assessment and throughout the participant's enrollment in career or training services. WIOA-funded supportive services may be provided to the participant only after staff have determined and appropriately documented the following:

- Supportive services are necessary for the participant to complete career or training services.
- The identified supportive service is not available through other agencies, programs, or resources.
 - If available through other sources, staff must document how/why referrals to other agencies for the supportive service would create a hardship for the participant.
- Determination of need for the supportive service is included in the participant's Individual Service Strategy (ISS) OR Individual Employment Plan (IEP). An explanation regarding the participant's need for supportive service must be included in the participant's case notes in Employ Florida.
- Participant has completed and signed a *Determination of Need Statement Form* documenting the financial need for support. A copy of the form must be maintained in the participant's case file.
- The completion of a *Receipt of Supportive Services* form documenting the cost, purpose and need for the requested supportive service.
 - The record of payment will be included in the participant's case file.
- Staff will enter the appropriate service code in the State's Management Information System, Employ Florida, along with a supporting case note documenting the need for the supportive service, as reflected in the ISS or IEP.



Staff must ensure the supportive services provided are used for their intended purpose and must not be issued to a third party on behalf of the WIOA Youth participant. Supportive services are purchased directly from the appropriate vendor; CSRC does not reimburse the participant for the costs incurred. The availability of supportive services may vary with each program year and is based on WIOA Youth Program funding availability.

Due to limited WIOA Youth program funding, CSRC does not regularly authorize supportive service payments for housing expenses, childcare/dependent care, legal fees, fines, late fees, court costs, or any item not listed in the chart below. However, requests for support services not listed may be approved by the WIOA Youth Program Manager.

SUPPORT SERVICE LIMITATIONS PER YOUTH PER PROGRAM YEAR		
Support Service	Cost Limitation	Quantity Limitation
Uniforms	\$100.00	2 Tops, 2 Bottoms
Shoes	\$50.00	One Pair
Safety Steel Toe Boots	\$75.00	One Pair
Interview Attire	\$100.00	2 Tops, 2 Bottoms
Tools	\$100.00	No Quantity Limitation
Background Screening	\$100.00	No Quantity Limitation
Physicals/Drug Screening	\$100.00	No Quantity Limitation
Bus Passes	\$35.00	One Book Per Month Maximum
Gas Cards/Uber Cards	Based on Mileage, not to Exceed \$50.00	One Per Month Maximum
Educational Testing, Licensing Fees, Required Textbooks	\$300.00	No Quantity Limitation
Required Accommodations for Youth with Disabilities	No Predetermined Limit - Based on Documentation of Need and Manager approval	No Quantity Limitation
Driver's License, Permit, State ID	No Predetermined Limit. Based on actual cost.	No Quantity Limitation

Reference Documents:

WIOA Youth - Supportive Services Procedure

Agenda Item 5d Youth Council Meeting Minutes

April 15, 2025

Opening Remarks

1. Welcome & Attendance

Voting Items

2. None

Information/Discussion

3. Primary LWDB 20 Primary Indicators of Performance for Program Year (PY) 2024-2025 - 2nd Quarter
4. Summer of Success Update
5. Workforce Innovation Opportunity Act (WIOA) Youth - Internal Performance Report - 3rd Quarter PY 2024-2025
6. Workforce Innovation Opportunity Act (WIOA) Youth - Programmatic Update
7. Workforce Innovation Opportunity Act (WIOA) Youth - Success Story
8. Adjournment

Members Participating by Teleconference:

William Armstead, David Freeland, Tracey Miller, Aliesha Seitz, Christie Shields, Lorna Landherr, Lana Barros, Robert McPartlan

Members Present

None - Teleconference Only

Members Excused

Freddie Woolfork, Deb Frazier, Prashanth Pilly, Terrance Moore

Members Unexcused

None

Staff Participating by Teleconference

Shelly Batton, Kate Sayger, Angie Stickland, Jennifer Eimann

Call to Order

Terrance Moore, Chair, was not available to attend the meeting. Shelly Batton, Director of Programs, called the meeting to order at 8:09 am. A quorum was established.

Agenda Item 2 - Voting Items:

There were no voting items on this agenda.

Agenda Item 3 - Primary LWDB 20 Primary Indicators of Performance for Program Year (PY) 2024-2025 - 2nd Quarter:

Shelly Batton, Director of Programs, presented the Primary Indicators of Performance for the 2nd Quarter of PY 2024- 2025. 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. Ms. Batton presented the Statewide Indicators of Performance, which reflects the performance outcomes for all Local Workforce Development Boards (LWDBs) across the state. LWDB 20 is one of the top five performing boards.

The numbers in the Primary Indicators of Performance for the 2nd Quarter of PY 2024-2025, Youth category, show that LWDB 20 has either met or exceeded all performance goals. Ms. Batton stated that the Eckerd staff had worked hard to meet the negotiated performance targets for youth.

Agenda Item 4 - Summer of Success Update:

Shelly Batton, Director of Programs, provided an update on the Summer of Success (SOS) Program. Ms. Batton explained that the SOS program provides career development opportunities for young people in our community. This comprehensive program combines professional skills training with real-world work experience through paid internships.

This program is made possible through funding provided by the St. Lucie County Board of County Commissioners and is overseen this year by Christina Coble, Business Services Manager.

Duration: June 9 - July 11, 2025

Eligibility: Youth ages 16-21

Application Status: Currently open

How to Apply: Applications are available through our website

Agenda Item 5 - Workforce Innovation Opportunity Act (WIOA) Youth - Internal Performance Report - 3rd Quarter PY 2024-2025:

Angie Strickland, Program Manager, presented the WIOA Youth Connections Performance Report for the 3rd quarter PY 2024-2025.

Ms. Strickland shared the following performance measures:

- Out of School Youth (OSY) Enrollments - On Track - Goal 53 Participants - YTD 46 OSY Enrollments
- In-School Youth (ISY) Enrollments - On Track - Goal 17 Participants - YTD 10 ISY Enrollments
- Total Number of Enrollments - On Track - Goal 70 Participants - YTD 56 Enrollments

- % ISY Enrollments - Needs Improvement - Goal 25% - YTD 17.9% ISY Enrollments
- Work Experience (W/Ex) Internship Placements - YTD 37 Internship Placements
- W/Ex Successful Internship Completions - YTD 32 Successful Internship Completions
- W/Ex Internship Completion Percentage - YTD 86.5% Internship Completion Percentage
- W/Ex Expenditures - On Track - Goal \$222,735.00 - YTD \$152,395.74

Ms. Strickland stated that the staff have done a tremendous job meeting these goals amid challenges such as reorganizing office facilities. As a result, Ms. Strickland is extremely optimistic about continuing to successfully meet the performance benchmarks for PY 2024- 2025.

Agenda Item 6 - Workforce Innovation Opportunity Act (WIOA) Youth - Programmatic Update:

Angie Strickland, Program Manager, provided WIOA Youth programmatic updates.

Mid Florida Career Fair - April 8, 2025:

Strong turnout with excellent representation from CSRC. Ms. Strickland stated that WT Career Coach, Herla Arteche, has done a tremendous job providing information regarding Youth Connections to potential participants and advocating for the program, as has the rest of her staff. She specifically praised Ms. Arteche's performance at the Lucie County Job Fair, noting the high level of youth engagement.

Upcoming Graduation Achievements:

12 students graduating from traditional high school
 5 students completing Penn Foster graduation by the end of June
 5-6 students obtaining GEDs by the end of June
 1 student completing the EMT certification program this month

Current Areas of Focus:

Summer internship preparation
 Graduation support
 Post-graduation planning and school assistance for graduating seniors

Agenda Item 7 - Youth Success Story:

Angie Strickland, Program Manager, shared a success story video.

Melonie Tarnoff, Lead Workforce Career Coach, worked with Jaden Rucker, exploring career pathways that enabled him to learn essential skills that would eventually lead to self-sufficient employment. As a result, Jaden was placed in an entry-level warehouse internship. At the successful end of the internship, even though the company did not have a position open for Jaden, the employer offered to write him a letter of reference stating he was a hardworking intern and a great young man.

As a result, Jaden was interviewed for and placed in an on-the-job training (OJT) opportunity as an inventory specialist with TMX Aero, an aerospace manufacturing company. Michelle Oakley, Director of TMX Aero, stated that they were so impressed by Justin's preparedness during the interview process that they hired him over more skilled applicants.

Angie Strickland, Program Manager, stated that due to Ms. Tarnoff's work with Justin through close mentoring, Justin began to feel more confident and mastered skills that he would use in his interview and OJT. As a result, Justin has exceeded expectations and feels he is on a positive career pathway.

Agenda Item 8 - Adjournment:

Having no other business, the Youth Council meeting was adjourned at 8:42 AM.

BOARD STAFF CERTIFICATION

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

Board Staff
Shelly Batton

Date



Agenda Item 5e Executive Committee Meeting Minutes

May 16, 2025

Opening Remarks

1. Welcome & Attendance
2. Conflict of Interest Declaration

Voting Items

3. Review and Approve February and March Financial Reports - PY 2024-2025
4. Review and Approve Administrative - Safety Policy
5. Review and Approve RFP 25-001-NDWG - Employer of Record (EOR)
6. Review and Approve Slate of Officers - PY 2025-2026

Information/Discussion

7. WIOA Primary Indicators of Performance - 2nd Quarter PY 2024-2025
8. Letter Grade - Performance Update 1st Quarter - PY 2024-2025
9. CareerSource Research Coast (CSRC) Updates
 - Ad Hoc Search Committee - Board Membership
 - CareerSource Florida FWDA/Board/Council Meetings May 19-21, 2025
 - Comprehensive Career Center Update
10. Adjournment - Next Executive Meeting - June 13, 2025

Members Present:

None - Virtual Only

Members Participating by Teleconference:

Bob Cenk	Jim Brann	William Armstead
Leslie Kristof	Terrance Moore	

Members Excused

Werner Bols

Administrative Staff Present/Teleconference:

Brian Bauer	Tracey McMorris	Lisa Delligatti
Jennifer Eimann		

Call to Order:

Jim Brann, Chair, called the meeting to order at 8:03 a.m. A quorum was established.

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

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

Agenda Item 3 - Review and Approve February and March Financial Reports - PY 2024-2025:

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

- Expenditures are 64.2%.
- Individual Training Accounts (ITA) are at 46-47%, slightly over the 40% ITA sliding scale set by FLORIDACOMMERCE.
- Training funds are projected to meet 100% of the training goals for the year.

A motion was made by Terrance Moore to approve the Financial Reports for February and March, as presented. Bob Cenk seconded the motion. The motion passed unanimously.

Agenda Item 4 - Review and Approve Administrative - Safety Policy:

Lisa Delligatti, CFO, introduced a new administrative safety policy that is a requirement of our Workers' Compensation carrier. Ms. Delligatti stated that CareerSource Research Coast (CSRC) addressed safety issues in the Employee Handbook, but there was no written policy.

This policy outlines CSRC's commitment to providing employees with a safe and healthy workplace. It is the policy of CSRC that employees report unsafe conditions and do not perform work tasks if the work is considered unsafe. Employees must report all accidents, injuries, and unsafe conditions to their supervisors. No such report will result in retaliation, penalty, or other disincentives.

Terrance Moore made a motion to approve the Administrative Safety Policy, as presented. William Armstead seconded the motion. The motion passed unanimously.

Agenda Item 5 - Review and Approve RFP 25-001-NDWG - Employer of Record (EOR):

Brian Bauer, President/CEO, explained that the current Employer of Record (EOR) contract expires on 6/30/2025. Contracts are awarded for a period of five (5) years, renewable annually, dependent upon performance.

CareerSource Research Coast (CSRC) released a formal Request for Proposal for an Employer of Record with a submission deadline of April 25, 2025, for the period of July 1, 2025, through June 30, 2030.

CSRC received three (3) proposals that passed technical review. The Review Team reviewed and discussed their evaluations of all proposals, combined the individual scores, and arrived at a composite technical score for each proposal. A rating team consisting of Lisa Delligatti, CFO, Heidi Whybrew, HR, and Jennifer Eimann, Executive Assistant, reviewed and rated each proposal.

The RFP/RFQ Rating Team Compilation is being proposed to the Executive Committee for review and approval. Based on the team's cumulative rating score, Manpower, Inc. has been determined to be the most advantageous contract award for CSRC.

William Armstead made a motion to approve the RFP 25-001-NDWG - Employer of Record (EOR), as presented. Terrance Moore seconded the motion. The motion passed unanimously.

Agenda Item 6 - Review and Approve Slate of Officers - PY 2025-2026:

Brian Bauer, President/CEO, stated that the Board's By-Laws state that the Chairperson, Vice Chairperson, and Treasurer shall be appointed annually by the Board and shall serve a one (1) year term commencing July 1. The Chairperson's and the Vice Chairperson's terms shall be limited to two (2) consecutive one (1) year terms, and the Treasurer shall be limited to four (4) consecutive one (1) year terms. There are no limitations on the number of terms not in sequence or in different offices.

The Slate of Officers presented for approval:

- Jim Brann - Chair
- William Armstead - Vice Chair
- Christi Shields - Treasurer

A motion was made by Bob Cenk to approve the Slate of Officers - PY 2025-2026, as presented. Leslie Kristof seconded the motion. The motion passed unanimously.

Agenda Item 7 - Primary Indicators of Performance 2nd Quarter PY 2024-2025:

Brian Bauer, President/CEO, presented the Primary Indicators of Performance for the 2nd Quarter of PY 2024-2025. 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 report categories show that the LWDB 20 has either met or exceeded all performance goals. Mr. Bauer stated that staff had worked hard to meet the negotiated performance targets and that strategic, operational steps would ensure all performance goals were met.

Agenda Item 8 - Letter Grade - Performance Update 1st Quarter - PY 2024-2025:

Brian Bauer, President/CEO, stated that the [Reimagining Education and Career Help \(REACH\) Act](#) calls for each local workforce development board in Florida to be assigned a letter grade annually based on performance criteria developed by the Governor's REACH Office. The CareerSource Florida Board of Directors assigns and makes public a letter grade for each local workforce development board.

Mr. Bauer highlighted an improvement in the program's letter grade from a B to a B+, reflecting overall positive performance. Mr. Bauer shared that the state board is expected to vote on updates to the letter grade formulas in the upcoming CareerSource Florida board meetings.

Agenda Item 9 - CareerSource Research Coast (CSRC) Discussion:

Brian Bauer, President/CEO, discussed the following updates:

Ad Hoc Search Committee - Board Membership - Brian Bauer discussed board membership status, indicating one open seat following Helen Caseltine’s retirement. Mr. Bauer stated that further discussions and inquiries will need to be made in order to determine viable candidates to fill the seat.

CareerSource Florida FWDA/Board/Council Meetings May 19-21, 2025 - Brian Bauer stated that he and Jim Brann will be attending the FWDA/Board/Council Meetings May 19-21, 2025, at the Marriott Sanibel Harbour Resort & Spa, Fort Myers, FL.

Mr. Bauer stated that the state budget, which includes local allocations, should be approved. Bauer expressed optimism about funding, reporting an increase of over half a million dollars compared to the previous year.

Comprehensive Career Center Update - Brian Bauer updated the executive committee on the status of the Comprehensive Center move, noting that the office is expected to be ready for occupancy in June.

Mr. Bauer requested approval to close the physical office from June 10th to 13th and June 16th, emphasizing that virtual services will still be available. James Brann made a motion to approve the request. The request was approved.

Agenda Item 10 - Adjournment:

With no further items to discuss, a motion was made by Jim Brann to adjourn the meeting, seconded by Pamela Burchell. The motion passed unanimously, and the meeting was adjourned at 8:33 a.m.

Next Executive Committee Meeting – June 13, 2025

BOARD SECRETARY CERTIFICATION

I hereby certify 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
Staff Secretary

Date

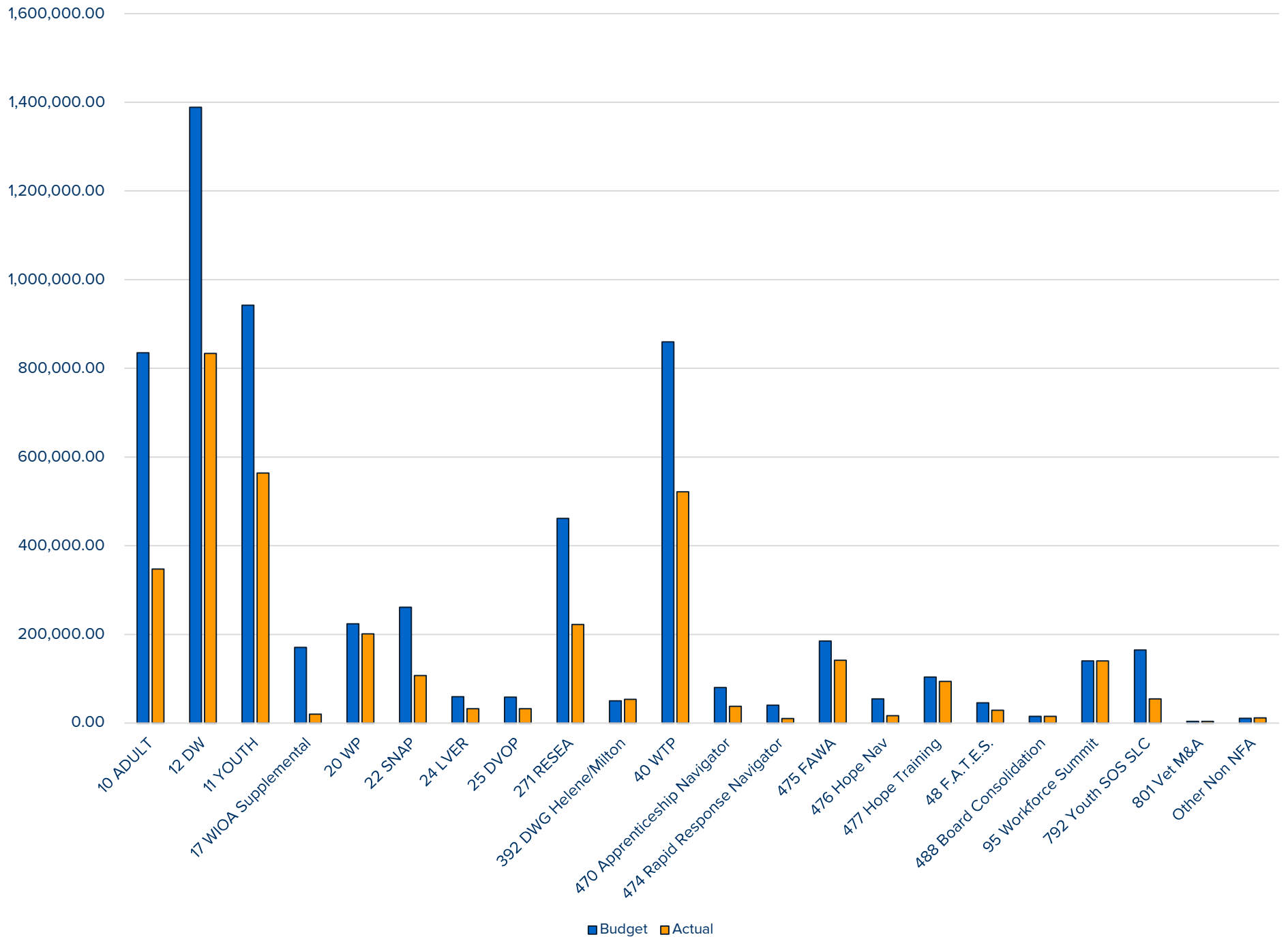
LWDB 20
Summary of Funding and Expenditures
as of February 28, 2025

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	392 DWG Helene Milton	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	\$ 445,253	\$ 50,000	\$ 963,229	\$ 80,000	\$ 63,800
PY 24-25 Supplemental		\$ -	\$ 164,384	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ (340,990)	\$ -	\$ (78,446)	\$ (91,168)	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 25-26		\$ -	\$ (323,313)	\$ (337,262)	\$ -	\$ (330,407)	\$ (93,026)	\$ (8,699)	\$ (41,090)	\$ (114,078)	\$ -	\$ (369,333)	\$ -	\$ (34,419)
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	\$ 1,388,540	\$ 942,032	\$ 170,532	\$ 223,822	\$ 261,220	\$ 59,485	\$ 58,379	\$ 461,462	\$ 50,000	\$ 859,699	\$ 80,000	\$ 40,581
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ -	\$ 834,953	\$ 1,388,540	\$ 942,032	\$ 170,532	\$ 223,822	\$ 261,220	\$ 59,485	\$ 58,379	\$ 461,462	\$ 50,000	\$ 859,699	\$ 80,000	\$ 40,581
FUNDING DRAWN DOWN YTD	INDIRECT	10 ADULT	12 DW	11 YOUTH	17 WIOA Supplemental	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	392 DWG Helene Milton	40 WTP	470 Apprenticeship Navigator	474 Rapid Response Navigator
PY 24-25 Allocations		\$ 361,500	\$ 20,100	\$ -	\$ 10,938	\$ 78,842	\$ 29,875	\$ 10,811	\$ 6,957	\$ 98,072	\$ 50,400	\$ 253,981	\$ 36,700	\$ 10,500
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	\$ 820,768	\$ 505,446	\$ -	\$ 121,177	\$ 76,500	\$ 20,463	\$ 24,529	\$ 122,540	\$ -	\$ 265,803	\$ -	\$ -
Total DEO Grant Funding		\$ 369,526	\$ 840,868	\$ 505,446	\$ 10,938	\$ 200,019	\$ 106,375	\$ 31,274	\$ 31,485	\$ 220,612	\$ 50,400	\$ 519,784	\$ 36,700	\$ 10,500
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL		\$ 369,526	\$ 840,868	\$ 505,446	\$ 10,938	\$ 200,019	\$ 106,375	\$ 31,274	\$ 31,485	\$ 220,612	\$ 100,800	\$ 519,784	\$ 36,700	\$ 10,500
% of Total Budgeted Funding Received		44.26%	60.56%	53.65%	6.41%	89.37%	40.72%	52.58%	53.93%	47.81%	201.60%	60.46%	45.88%	25.87%
EXPENDITURES														
Administrative	\$ -	\$ 34,181	\$ 87,046	\$ 11,958	\$ 19,511	\$ 64,169	\$ 15,454	\$ 3,517	\$ 3,579	\$ 31,942	\$ 8,202	\$ 75,496	\$ 5,559	\$ 1,471
Salaries and Benefits	\$ 305,944	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 131,407	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (437,351)	\$ 189,241	\$ 7,571	\$ 11,958	\$ -	\$ 7,985	\$ 15,454	\$ 3,517	\$ 3,579	\$ 31,942	\$ 8,202	\$ 75,496	\$ 5,559	\$ 1,471
Reclassification	\$ -	\$ (155,059)	\$ 79,475	\$ -	\$ 19,511	\$ 56,184	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ 313,036	\$ 746,467	\$ 552,000	\$ 864	\$ 136,954	\$ 91,798	\$ 28,805	\$ 29,015	\$ 190,414	\$ 45,538	\$ 446,166	\$ 32,465	\$ 8,772
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 484,616	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 158,349	\$ 502,933	\$ 23,182	\$ 9,971	\$ -	\$ 15,935	\$ 60,754	\$ 3,189	\$ 3,989	\$ 137,184	\$ 3,749	\$ 247,137	\$ 25,207	\$ 6,789
Contract Labor	\$ -	\$ 7,866	\$ 358	\$ -	\$ -	\$ 47	\$ 4,776	\$ 19	\$ 28	\$ 5,640	\$ 10,000	\$ 42,965	\$ 279	\$ 93
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,350	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ 525	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,416	\$ -	\$ -
Support Services ITA	\$ -	\$ 33,336	\$ 1,475	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ 206,806	\$ 2,925	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-OJT	\$ -	\$ 138,115	\$ 6,486	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 27,946	\$ -	\$ -	\$ -
Travel	\$ 521	\$ 2,852	\$ 121	\$ 536	\$ -	\$ 320	\$ 1,010	\$ 3,831	\$ 2,445	\$ 769	\$ 5	\$ 2,227	\$ 350	\$ 40
One Stop Shared Costs	\$ -	\$ 63,521	\$ 3,110	\$ -	\$ -	\$ 29,438	\$ 10,428	\$ 18,594	\$ 19,279	\$ 23,730	\$ 359	\$ 44,512	\$ 3,910	\$ 835
Other Operating Expenses	\$ 25,126	\$ 53,722	\$ 3,072	\$ 51,846	\$ -	\$ 14,153	\$ 8,327	\$ 1,693	\$ 1,769	\$ 9,653	\$ 28	\$ 69,796	\$ 379	\$ 396
Allocated Program Indirect	\$ (183,995)	\$ 79,614	\$ 3,185	\$ 5,031	\$ -	\$ 3,359	\$ 6,502	\$ 1,480	\$ 1,506	\$ 13,438	\$ 3,451	\$ 31,761	\$ 2,339	\$ 619
Reclassification	\$ -	\$ (776,255)	\$ 702,552	\$ -	\$ 864	\$ 73,703	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expenditures	\$ 0	\$ 347,217	\$ 833,512	\$ 563,958	\$ 20,375	\$ 201,123	\$ 107,252	\$ 32,322	\$ 32,594	\$ 222,355	\$ 53,740	\$ 521,662	\$ 38,024	\$ 10,243
Funding Over/(under) expenditures	\$ 0	\$ 22,309	\$ 7,356	\$ (58,512)	\$ (9,437)	\$ (1,104)	\$ (877)	\$ (1,048)	\$ (1,108)	\$ (1,744)	\$ 47,060	\$ (1,878)	\$ (1,324)	\$ 257
YTD % of Budgeted Funds Expended		41.59%	60.03%	59.87%	11.95%	89.86%	41.06%	54.34%	55.83%	48.19%	107.48%	60.68%	47.53%	25.24%

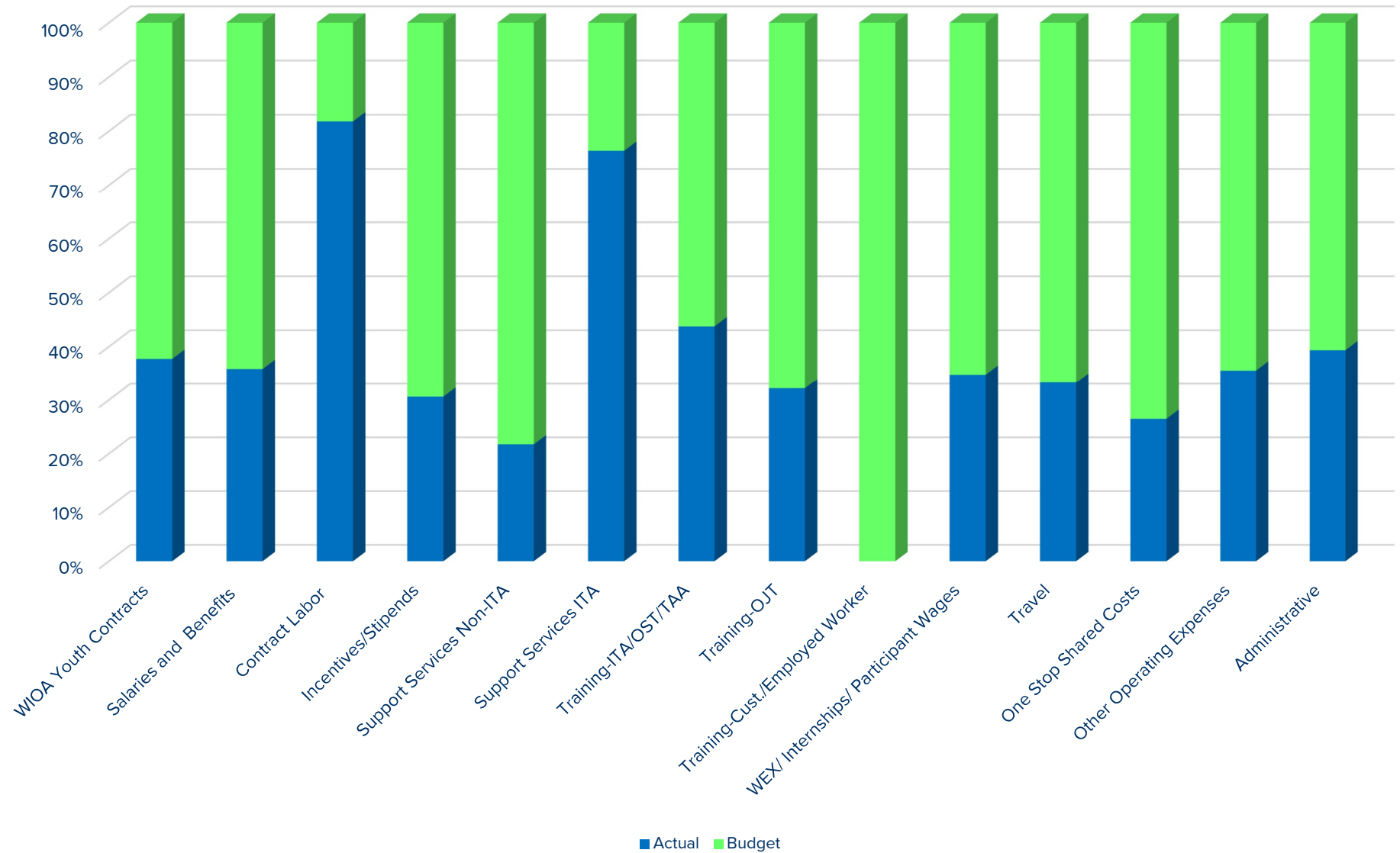
LWDB 20
Summary of Funding and Expenditures
as of February 28, 2025

PY 24-25 TOTAL AVAILABLE FUNDING	475 FAWA	476 Hope Nav	477 Hope Training	48 F.A.T.E.S.	488 Board Consolidation	801 Vet M&A	95 Workforce Summit	792 Youth SOS SLC	Other Non NFA	YEAR TO DATE TOTALS			
PY 24-25 Allocations	\$ -	\$ 54,062	\$ -	\$ -	\$ 15,000	\$ 4,008	\$ 140,000	\$ -	\$ -		\$ 5,608,689		
PY 24-25 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 164,384		
Additional Funds/Incentives	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -		
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ (510,604)		
Carryforward to PY 25-26	\$ (794,777)	\$ (29,278)	\$ -	\$ (89,054)	\$ -	\$ -	\$ -	\$ -	\$ -		\$ (2,564,736)		
Carryforward from PY 23-24	\$ 979,600	\$ 30,000	\$ 104,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 3,127,585		
Total DEO Grant Funding	\$ 184,823	\$ 54,784	\$ 104,000	\$ (89,054)	\$ 15,000	\$ 4,008	\$ 140,000	\$ -	\$ -		\$ 5,844,265		
OTHER NON DEO REVENUES	\$ -	\$ -	\$ -	\$ 135,000	\$ -	\$ -	\$ -	\$ 165,000	\$ 10,757		\$ 310,757		
TOTAL	\$ 184,823	\$ 54,784	\$ 104,000	\$ 45,946	\$ 15,000	\$ 4,008	\$ 140,000	\$ 165,000	\$ 10,757	\$ -	\$ 6,155,022		
FUNDING DRAWN DOWN YTD	475 FAWA	476 Hope Nav	477 Hope Training	48 F.A.T.E.S.	488 Board Consolidation	801 Vet M&A	95 Workforce Summit	792 Youth SOS SLC	Other Non NFA	PY 24-25 Actual	PY 24-25 Budget	VARIANCE	% Expended
PY 24-25 Allocations	\$ -	\$ -	\$ -	\$ -	\$ 15,000	\$ 4,008	\$ 139,434	\$ -	\$ -	\$ 1,127,118	\$ 5,608,689	\$ 4,481,571	20.096%
PY 24-25 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 164,384	\$ 164,384	0.000%
Additional Funds/Incentives	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (510,604)	\$ (510,604)	
Carryforward to PY 25-26	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (2,564,736)	\$ (2,564,736)	
Carryforward from PY 23-24	\$ 135,863	\$ 14,123	\$ 91,565	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,206,803	\$ 3,127,585		
Total DEO Grant Funding	\$ 135,863	\$ 14,123	\$ 91,565	\$ -	\$ 15,000	\$ 4,008	\$ 139,434	\$ -	\$ -	\$ 3,333,921	\$ 5,844,265		
OTHER NON DEO REVENUES	\$ -	\$ -	\$ -	\$ 135,239	\$ -	\$ -	\$ -	\$ 46,425	\$ 27,412	\$ 209,076	\$ 310,757	\$ 101,681	67.280%
TOTAL	\$ 135,863	\$ 14,123	\$ 91,565	\$ 135,239	\$ 15,000	\$ 8,016	\$ 139,434	\$ 46,425	\$ 27,412	\$ 3,542,998	\$ 6,155,022	\$ 2,612,025	57.563%
% of Total Budgeted Funding Received	73.51%	25.78%	88.04%	294.34%	100.00%	200.00%	99.60%	28.14%	254.83%	57.56%			
EXPENDITURES										PY 24-25 Actual	PY 24-25 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ 20,981	\$ 2,462	\$ 13,652	\$ 4,383	\$ 2,335	\$ -	\$ 21,474	\$ 8,232	\$ 1,746	\$ 437,351	\$ 674,672	\$ 237,322	64.82%
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 305,944	\$ 511,554	\$ 205,610	59.81%
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 131,407	\$ 163,118	\$ 31,711	80.56%
Allocated Indirect Costs	\$ 20,981	\$ 2,462	\$ 13,652	\$ 4,383	\$ 2,446	\$ -	\$ 21,474	\$ 8,232	\$ 1,746	\$ (0)	\$ 0	\$ 0	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ (111)	\$ -	\$ -	\$ -	\$ -	\$ 0	\$ -	\$ 0	
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Program Training	\$ 120,668	\$ 14,414	\$ 80,478	\$ 24,540	\$ 12,665	\$ 4,008	\$ 118,773	\$ 46,536	\$ 9,949	\$ 3,054,321	\$ 5,473,288	\$ 2,418,966	55.8%
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 484,616	\$ 800,000	\$ 315,384	60.6%
Salaries and Benefits	\$ 55,687	\$ 11,467	\$ 60,836	\$ 2,818	\$ -	\$ -	\$ -	\$ 1,055	\$ 3,205	\$ 1,333,433	\$ 2,386,589	\$ 1,053,156	55.9%
Contract Labor	\$ 1,180	\$ 68	\$ 867	\$ 46	\$ -	\$ -	\$ -	\$ 1,751	\$ -	\$ 75,983	\$ 16,903	\$ (59,080)	449.5%
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,350	\$ 12,126	\$ 6,776	44.1%
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,941	\$ 10,600	\$ 7,659	27.7%
Support Services ITA	\$ -	\$ -	\$ -	\$ 2,377	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 37,188	\$ 11,500	\$ (25,688)	323.4%
Training-ITA/OST/TAA	\$ -	\$ -	\$ -	\$ 16,631	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 226,362	\$ 290,957	\$ 64,596	77.8%
Training-OJT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 144,601	\$ 304,638	\$ 160,036	47.5%
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 50,000	\$ 50,000	0.0%
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 38,944	\$ -	\$ 66,891	\$ 125,421	\$ 58,530	53.3%
Travel	\$ 560	\$ 28	\$ 1,018	\$ 8	\$ -	\$ -	\$ -	\$ 51	\$ 10	\$ 16,704	\$ 33,500	\$ 16,796	49.9%
One Stop Shared Costs	\$ 9,325	\$ 1,168	\$ 11,066	\$ 412	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 239,687	\$ 665,167	\$ 425,480	36.0%
Other Operating Expenses	\$ 45,089	\$ 648	\$ 948	\$ 404	\$ 12,500	\$ 4,008	\$ 109,739	\$ 1,271	\$ 6,000	\$ 420,566	\$ 762,562	\$ 341,996	55.2%
Allocated Program Indirect	\$ 8,827	\$ 1,036	\$ 5,744	\$ 1,844	\$ 1,029	\$ -	\$ 9,034	\$ 3,463	\$ 735	\$ (0)	\$ 3,324	\$ -	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ (864)	\$ -	\$ -	\$ -	\$ -	\$ 0	\$ -	\$ 0	
Total Expenditures	\$ 141,649	\$ 16,876	\$ 94,130	\$ 28,923	\$ 15,000	\$ 4,008	\$ 140,246	\$ 54,768	\$ 11,695	\$ 3,491,672	\$ 6,147,960	\$ 2,656,288	56.8%
Funding Over/(under) expenditures	\$ (5,786)	\$ (2,753)	\$ (2,565)	\$ 106,316	\$ -	\$ 4,008	\$ (812)	\$ (8,343)	\$ 15,717	\$ 51,325			
YTD % of Budgeted Funds Expended	76.64%	30.80%	90.51%	62.95%	100.00%	100.00%	100.18%	33.19%	108.72%	56.73%			

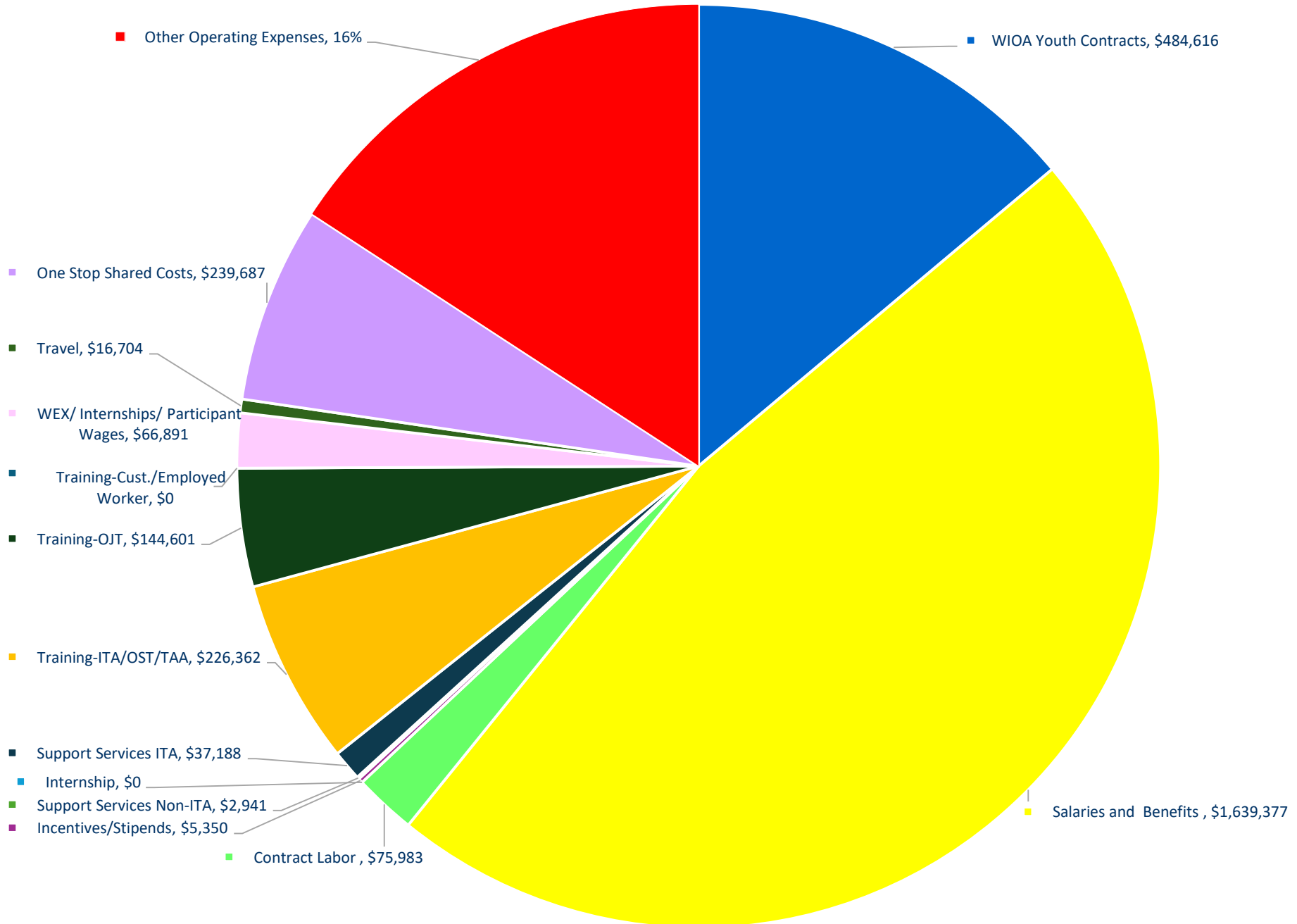
Budget to Actual by Program



Expenditures by Category



Expenditure Categories



Workforce Development Board of the Treasure Coast, Inc.
Statement of Financial Position
As of 2/28/2025

	Current Year
Assets	
Current assets	
Cash - Accounts Payable	5,212.59
Cash - Payroll	20,961.33
Cash - Business Checking W/Int.	376,862.71
Accounts Receivable Customers	2,961.03
Accounts Receivable - Other	798.87
Grants Receivable	(91.58)
Prepaid Expenses	52,470.91
Deposits	7,367.08
Due TO/ Due FROM	2,137.61
Total Current assets	468,680.55
Non-current assets	
Data Processing Equipment	119,215.39
Vehicles	447,386.10
Lease Assets - Building	3,719,789.00
Lease Assets - Equipment	248,370.00
Leasehold Improvements	217,855.62
Accumulated Depreciation	(711,185.63)
Accumulated Amortization	(1,515,593.00)
Other Assets	24,240.00
Total Non-current assets	2,550,077.48
Total Assets	3,018,758.03
Liabilities & Net Assets	
Current Liabilities	
Accounts Payable	40,993.77
Payroll Accounts Payable	427.65
Accrued Expenses	60,254.79
Federal Withholding Tax	(2,107.94)
FICA Payable	2,108.53
SUTA Payable	379.80
Principal Insurance	255.00
Health Insurance Payable	1,989.91
AFLAC Payable	77.92
Legal Shield	189.82
Workers Comp Payable	5,944.22
Accrued Leave	101,681.04
Lease Interest Payable	5,257.00
Refundable Advances	1,844.19
Deferred Revenue	3,087.50
Total Current Liabilities	222,383.20
Non-current liabilities	
Short-term Lease Liability	316,523.00
Long-term Lease Liability	2,650,628.00
Lease Liability Offset	(316,523.00)
Total Non-current liabilities	2,650,628.00
Net Assets	
Beginning of Year	1,032,582.20
Current Year	(886,835.37)
Total Net Assets	145,746.83
Total Liabilities & Net Assets	3,018,758.03

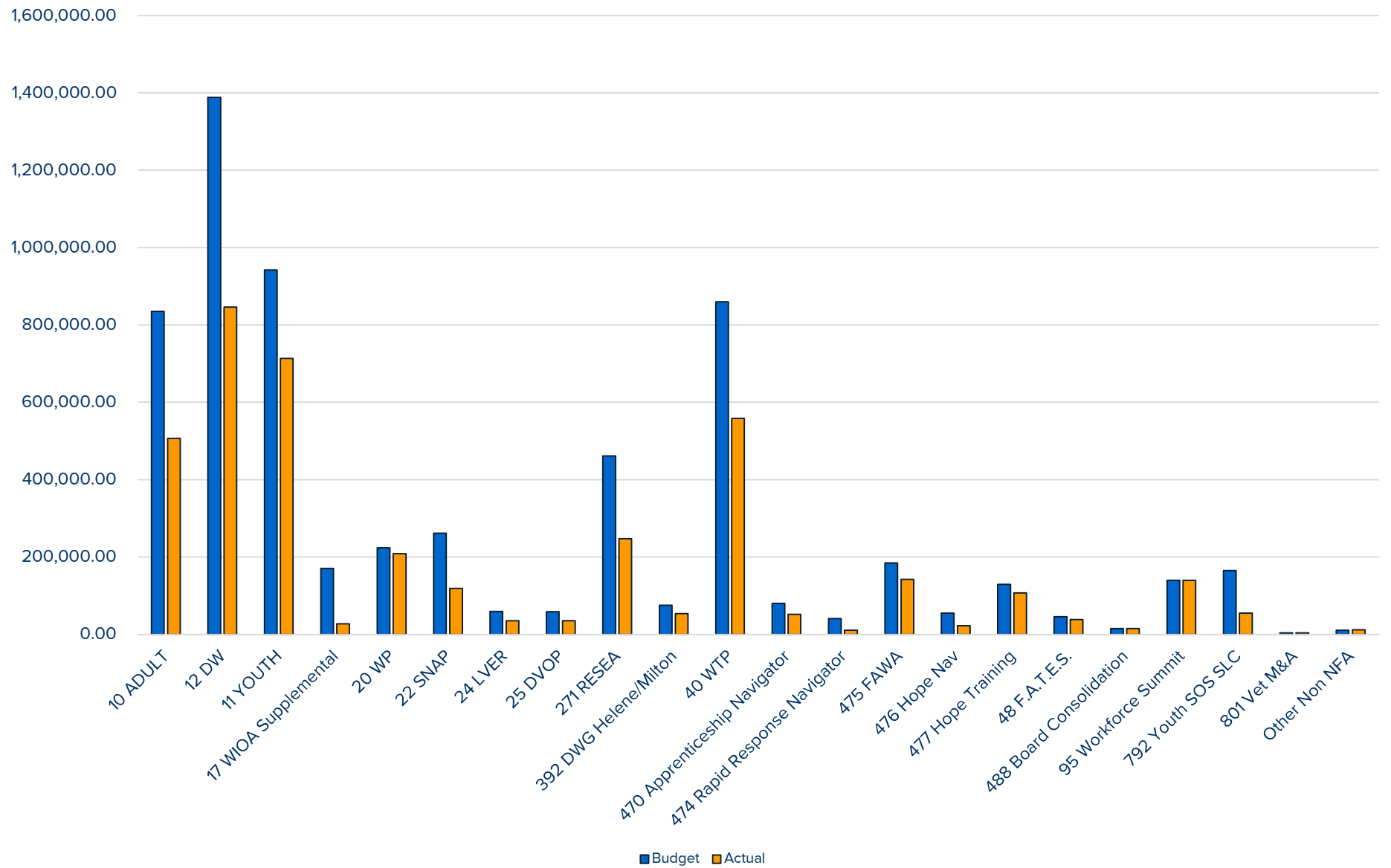
LWDB 20
Summary of Funding and Expenditures
as of March 31, 2025

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	392 DWG Helene Milton	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	\$ 445,253	\$ 75,000	\$ 963,229	\$ 80,000	\$ 63,800
PY 24-25 Supplemental		\$ -	\$ 164,384	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ (340,990)	\$ -	\$ (78,446)	\$ (91,168)	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 25-26		\$ -	\$ (323,313)	\$ (337,262)	\$ -	\$ (330,407)	\$ (93,026)	\$ (8,699)	\$ (41,090)	\$ (114,078)	\$ -	\$ (369,333)	\$ -	\$ (34,419)
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	\$ 1,388,540	\$ 942,032	\$ 170,532	\$ 223,822	\$ 261,220	\$ 59,485	\$ 58,379	\$ 461,462	\$ 75,000	\$ 859,699	\$ 80,000	\$ 40,581
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ -	\$ 834,953	\$ 1,388,540	\$ 942,032	\$ 170,532	\$ 223,822	\$ 261,220	\$ 59,485	\$ 58,379	\$ 461,462	\$ 75,000	\$ 859,699	\$ 80,000	\$ 40,581
FUNDING DRAWN DOWN YTD	INDIRECT	10 ADULT	12 DW	11 YOUTH	17 WIOA Supplemental	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	392 DWG Helene Milton	40 WTP	470 Apprenticeship Navigator	474 Rapid Response Navigator
PY 24-25 Allocations		\$ 448,500	\$ 20,100	\$ -	\$ 35,938	\$ 109,895	\$ 41,375	\$ 13,811	\$ 9,607	\$ 118,872	\$ 53,740	\$ 297,681	\$ 43,000	\$ 10,750
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	\$ 828,068	\$ 563,958	\$ -	\$ 101,125	\$ 76,500	\$ 20,463	\$ 24,529	\$ 122,540	\$ -	\$ 265,803	\$ -	\$ -
Total DEO Grant Funding		\$ 456,526	\$ 848,168	\$ 563,958	\$ 35,938	\$ 211,019	\$ 117,875	\$ 34,274	\$ 34,135	\$ 241,412	\$ 53,740	\$ 563,484	\$ 43,000	\$ 10,750
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL		\$ 456,526	\$ 848,168	\$ 563,958	\$ 35,938	\$ 211,019	\$ 117,875	\$ 34,274	\$ 34,135	\$ 241,412	\$ 107,480	\$ 563,484	\$ 43,000	\$ 10,750
% of Total Budgeted Funding Received		54.68%	61.08%	59.87%	21.07%	94.28%	45.12%	57.62%	58.47%	52.31%	143.31%	65.54%	53.75%	26.49%
EXPENDITURES														
Administrative	\$ -	\$ 50,230	\$ 87,257	\$ 14,801	\$ 26,614	\$ 64,948	\$ 16,875	\$ 3,835	\$ 3,810	\$ 35,089	\$ 8,202	\$ 79,728	\$ 7,460	\$ 1,496
Salaries and Benefits	\$ 342,164	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 136,429	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (478,594)	\$ 210,790	\$ 9,582	\$ 14,801	\$ -	\$ 8,764	\$ 16,875	\$ 3,835	\$ 3,810	\$ 35,089	\$ 8,202	\$ 79,728	\$ 7,460	\$ 1,496
Reclassification	\$ -	\$ (160,559)	\$ 77,675	\$ -	\$ 26,614	\$ 56,184	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ (0)	\$ 456,634	\$ 758,704	\$ 698,710	\$ 872	\$ 143,527	\$ 101,749	\$ 31,638	\$ 31,363	\$ 212,462	\$ 45,538	\$ 478,886	\$ 44,201	\$ 9,073
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 612,409	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 177,600	\$ 559,750	\$ 26,561	\$ 12,443	\$ -	\$ 18,223	\$ 67,296	\$ 3,796	\$ 4,596	\$ 150,655	\$ 3,749	\$ 267,064	\$ 32,971	\$ 7,041
Contract Labor	\$ -	\$ 7,866	\$ 358	\$ -	\$ -	\$ 47	\$ 5,633	\$ 19	\$ 28	\$ 8,838	\$ 10,000	\$ 45,806	\$ 279	\$ 93
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,325	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ 672	\$ 36	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,416	\$ -	\$ -
Support Services ITA	\$ -	\$ 36,937	\$ 1,959	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 100	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ 251,386	\$ 7,955	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,595	\$ -	\$ -
Training-OJT	\$ -	\$ 149,379	\$ 6,486	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 27,946	\$ -	\$ -	\$ -
Travel	\$ 590	\$ 3,029	\$ 128	\$ 541	\$ -	\$ 372	\$ 1,023	\$ 4,277	\$ 2,445	\$ 805	\$ 5	\$ 2,266	\$ 363	\$ 40
One Stop Shared Costs	\$ -	\$ 68,539	\$ 3,349	\$ -	\$ -	\$ 32,406	\$ 11,137	\$ 20,074	\$ 20,758	\$ 25,842	\$ 359	\$ 46,590	\$ 4,876	\$ 850
Other Operating Expenses	\$ 27,322	\$ 64,817	\$ 5,206	\$ 66,961	\$ -	\$ 15,012	\$ 9,414	\$ 1,825	\$ 1,900	\$ 11,256	\$ 28	\$ 72,488	\$ 2,508	\$ 406
Allocated Program Indirect	\$ (205,511)	\$ 90,514	\$ 4,115	\$ 6,356	\$ -	\$ 3,763	\$ 7,246	\$ 1,647	\$ 1,636	\$ 15,067	\$ 3,457	\$ 34,236	\$ 3,203	\$ 642
Reclassification	\$ -	\$ (776,255)	\$ 702,552	\$ -	\$ 872	\$ 73,703	\$ -	\$ -	\$ -	\$ -	\$ (6)	\$ -	\$ -	\$ -
Total Expenditures	\$ 0	\$ 506,864	\$ 845,961	\$ 713,512	\$ 27,486	\$ 208,475	\$ 118,624	\$ 35,473	\$ 35,173	\$ 247,551	\$ 53,740	\$ 558,613	\$ 51,661	\$ 10,569
Funding Over/(under) expenditures	\$ 0	\$ (50,338)	\$ 2,208	\$ (149,554)	\$ 8,452	\$ 2,544	\$ (748)	\$ (1,199)	\$ (1,038)	\$ (6,139)	\$ 53,740	\$ 4,870	\$ (8,661)	\$ 181
YTD % of Budgeted Funds Expended		60.71%	60.92%	75.74%	16.12%	93.14%	45.41%	59.63%	60.25%	53.64%	71.65%	64.98%	64.58%	26.04%

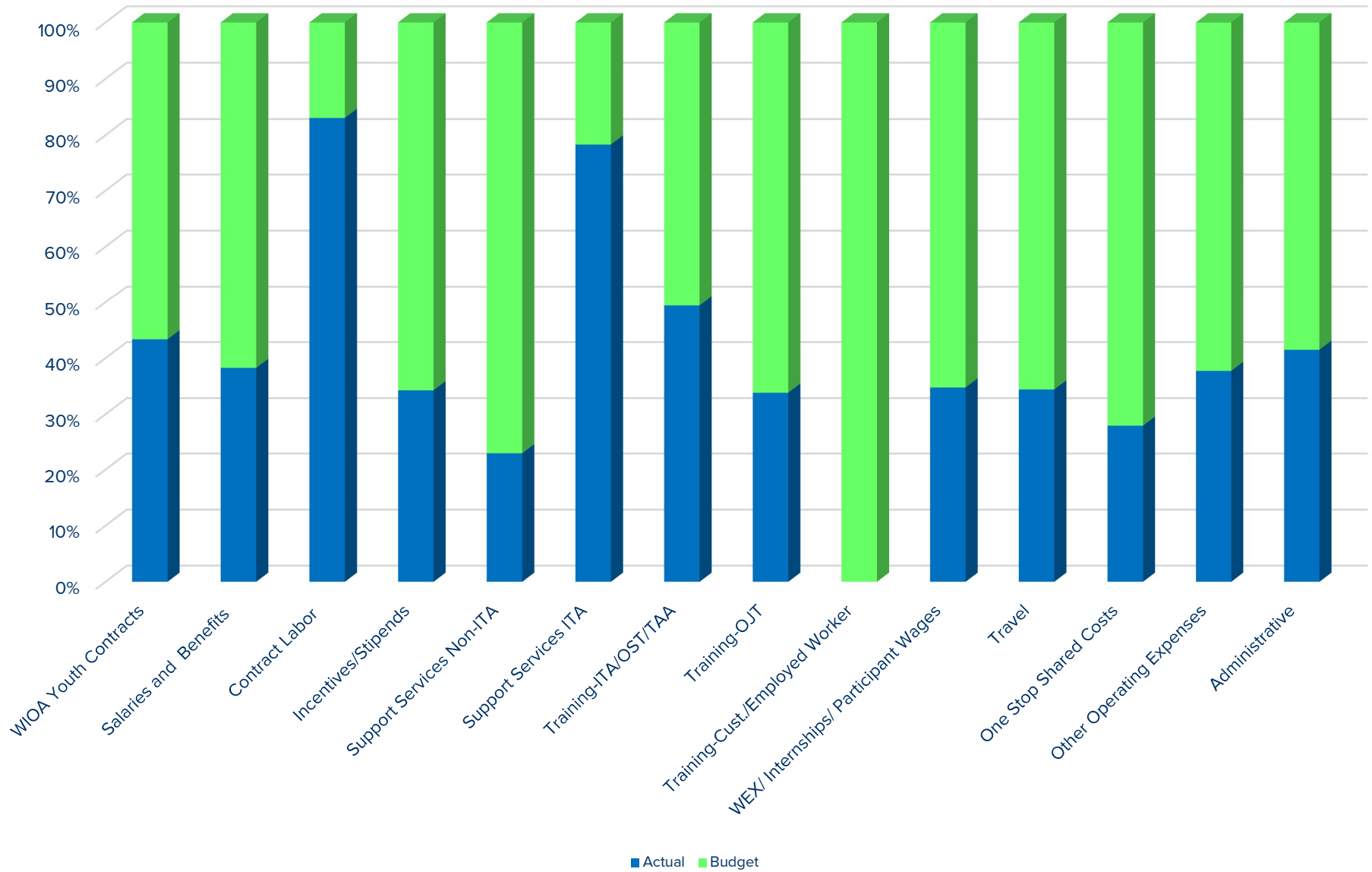
LWDB 20
Summary of Funding and Expenditures
as of March 31, 2025

PY 24-25 TOTAL AVAILABLE FUNDING	475 FAWA	476 Hope Nav	477 Hope Training	48 F.A.T.E.S.	488 Board Consolidation	801 Vet M&A	95 Workforce Summit	792 Youth SOS SLC	Other Non NFA	YEAR TO DATE TOTALS			
PY 24-25 Allocations	\$ -	\$ 54,062	\$ 25,000	\$ -	\$ 15,000	\$ 4,008	\$ 140,000	\$ -	\$ -		\$ 5,658,689		
PY 24-25 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 164,384		
Additional Funds/Incentives	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -		
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ (510,604)		
Carryforward to PY 25-26	\$ (794,777)	\$ (29,278)	\$ -	\$ (89,054)	\$ -	\$ -	\$ -	\$ -	\$ -		\$ (2,564,736)		
Carryforward from PY 23-24	\$ 979,600	\$ 30,000	\$ 104,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 3,127,585		
Total DEO Grant Funding	\$ 184,823	\$ 54,784	\$ 129,000	\$ (89,054)	\$ 15,000	\$ 4,008	\$ 140,000	\$ -	\$ -		\$ 5,894,265		
OTHER NON DEO REVENUES	\$ -	\$ -	\$ -	\$ 135,000	\$ -	\$ -	\$ -	\$ 165,000	\$ 10,757		\$ 310,757		
TOTAL	\$ 184,823	\$ 54,784	\$ 129,000	\$ 45,946	\$ 15,000	\$ 4,008	\$ 140,000	\$ 165,000	\$ 10,757	\$ -	\$ 6,205,022		
FUNDING DRAWN DOWN YTD	475 FAWA	476 Hope Nav	477 Hope Training	48 F.A.T.E.S.	488 Board Consolidation	801 Vet M&A	95 Workforce Summit	792 Youth SOS SLC	Other Non NFA	PY 24-25 Actual	PY 24-25 Budget	VARIANCE	% Expended
PY 24-25 Allocations	\$ -	\$ -	\$ -	\$ -	\$ 15,000	\$ 4,008	\$ 139,434	\$ -	\$ -	\$ 1,361,711	\$ 5,658,689	\$ 4,296,978	24.064%
PY 24-25 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 164,384	\$ 164,384	0.000%
Additional Funds/Incentives	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (510,604)	\$ (510,604)	
Carryforward to PY 25-26	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (2,564,736)	\$ (2,564,736)	
Carryforward from PY 23-24	\$ 148,963	\$ 20,123	\$ 103,265	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,283,363	\$ 3,127,585		
Total DEO Grant Funding	\$ 148,963	\$ 20,123	\$ 103,265	\$ -	\$ 15,000	\$ 4,008	\$ 139,434	\$ -	\$ -	\$ 3,645,073	\$ 5,894,265		
OTHER NON DEO REVENUES	\$ -	\$ -	\$ -	\$ 135,239	\$ -	\$ -	\$ -	\$ 46,425	\$ 28,087	\$ 209,751	\$ 310,757	\$ 101,006	67.497%
TOTAL	\$ 148,963	\$ 20,123	\$ 103,265	\$ 135,239	\$ 15,000	\$ 8,016	\$ 139,434	\$ 46,425	\$ 28,087	\$ 3,854,824	\$ 6,205,022	\$ 2,350,198	62.124%
% of Total Budgeted Funding Received	80.60%	36.73%	80.05%	294.34%	100.00%	200.00%	99.60%	28.14%	261.10%	62.12%			
EXPENDITURES										PY 24-25 Actual	PY 24-25 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ 20,738	\$ 3,215	\$ 15,317	\$ 5,718	\$ 2,335	\$ -	\$ 21,076	\$ 8,108	\$ 1,741	\$ 478,594	\$ 674,672	\$ 195,775	70.94%
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 342,164	\$ 511,554	\$ 169,390	66.89%
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 136,429	\$ 163,118	\$ 26,689	83.64%
Allocated Indirect Costs	\$ 20,738	\$ 3,215	\$ 15,317	\$ 5,718	\$ 2,401	\$ -	\$ 21,076	\$ 8,108	\$ 1,741	\$ 152	\$ 0	\$ (152)	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ (66)	\$ -	\$ -	\$ -	\$ -	\$ (152)	\$ -	\$ (152)	
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Program Training	\$ 121,530	\$ 18,974	\$ 91,841	\$ 32,536	\$ 12,665	\$ 4,008	\$ 118,789	\$ 46,701	\$ 10,103	\$ 3,470,505	\$ 5,473,288	\$ 2,002,783	63.4%
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 612,409	\$ 800,000	\$ 187,591	76.6%
Salaries and Benefits	\$ 56,351	\$ 14,136	\$ 69,340	\$ 3,317	\$ -	\$ -	\$ -	\$ 1,201	\$ 3,338	\$ 1,479,428	\$ 2,386,589	\$ 907,161	62.0%
Contract Labor	\$ 1,180	\$ 68	\$ 867	\$ 46	\$ -	\$ -	\$ -	\$ 1,751	\$ -	\$ 82,878	\$ 16,903	\$ (65,975)	490.3%
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,325	\$ 12,126	\$ 5,801	52.2%
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ 25	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,149	\$ 10,600	\$ 7,451	29.7%
Support Services ITA	\$ -	\$ -	\$ -	\$ 2,604	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 41,600	\$ 11,500	\$ (30,100)	361.7%
Training-ITA/OST/TAA	\$ -	\$ -	\$ -	\$ 23,173	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 284,109	\$ 290,957	\$ 6,848	97.6%
Training-OJT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 155,865	\$ 304,638	\$ 148,773	51.2%
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 50,000	\$ 50,000	0.0%
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 38,944	\$ -	\$ 66,891	\$ 125,421	\$ 58,530	53.3%
Travel	\$ 561	\$ 29	\$ 1,035	\$ 9	\$ -	\$ -	\$ -	\$ 51	\$ 10	\$ 17,580	\$ 33,500	\$ 15,920	52.5%
One Stop Shared Costs	\$ 9,400	\$ 1,291	\$ 12,273	\$ 442	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 258,186	\$ 665,167	\$ 406,981	38.8%
Other Operating Expenses	\$ 45,133	\$ 2,069	\$ 1,748	\$ 466	\$ 12,500	\$ 4,008	\$ 109,739	\$ 1,272	\$ 6,007	\$ 462,085	\$ 762,562	\$ 300,478	60.6%
Allocated Program Indirect	\$ 8,905	\$ 1,381	\$ 6,577	\$ 2,455	\$ 1,031	\$ -	\$ 9,050	\$ 3,482	\$ 748	\$ (0)	\$ 3,324	\$ -	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ (866)	\$ -	\$ -	\$ -	\$ -	\$ 0	\$ -	\$ 0	
Total Expenditures	\$ 142,268	\$ 22,190	\$ 107,158	\$ 38,254	\$ 15,000	\$ 4,008	\$ 139,865	\$ 54,810	\$ 11,844	\$ 3,949,099	\$ 6,147,960	\$ 2,198,558	64.2%
Funding Over/(under) expenditures	\$ 6,695	\$ (2,066)	\$ (3,893)	\$ 96,985	\$ -	\$ 4,008	\$ (431)	\$ (8,384)	\$ 16,243	\$ (94,275)			
YTD % of Budgeted Funds Expended	76.98%	40.50%	83.07%	83.26%	100.00%	100.00%	99.90%	33.22%	110.10%	63.64%			

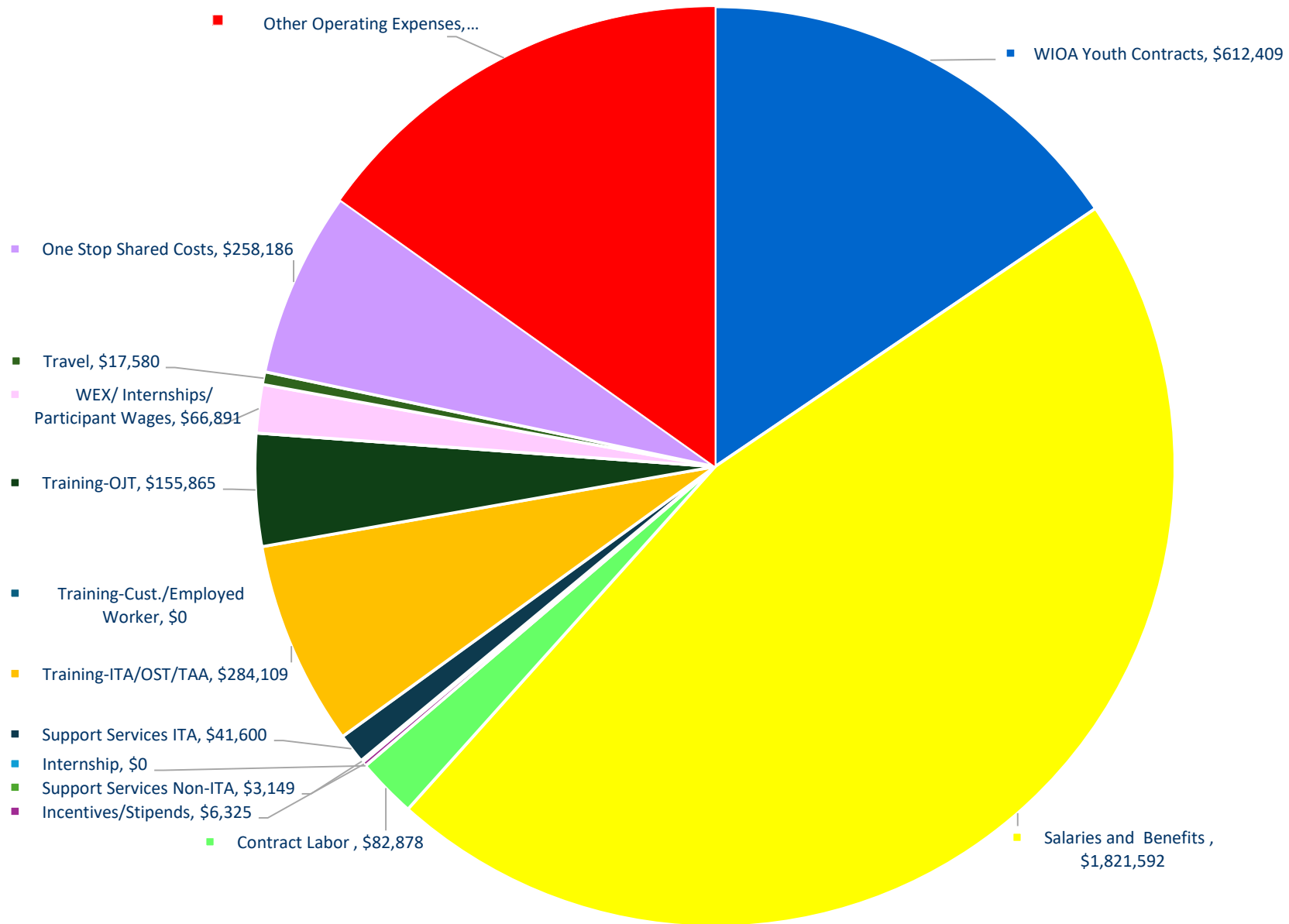
Budget to Actual by Program



Expenditures by Category



Expenditure Categories



Workforce Development Board of the Treasure Coast, Inc.
Statement of Financial Position
As of 3/31/2025

Assets

Current assets

Cash - Accounts Payable	5,212.59
Cash - Payroll	26,719.57
Cash - Business Checking W/Int.	375,095.50
Accounts Receivable Customers	111.03
Accounts Receivable - Other	534.48
Grants Receivable	(91.58)
Prepaid Expenses	49,071.98
Deposits	11,367.08
Due TO/ Due FROM	2,137.61
Total Current assets	470,158.26

Non-current assets

Data Processing Equipment	119,215.39
Vehicles	447,386.10
Lease Assets - Building	3,719,789.00
Lease Assets - Equipment	248,370.00
Leasehold Improvements	217,855.62
Accumulated Depreciation	(711,185.63)
Accumulated Amortization	(1,515,593.00)
Other Assets	24,240.00
Total Non-current assets	2,550,077.48
Total Assets	3,020,235.74

Liabilities & Net Assets

Current Liabilities

Accounts Payable	120,620.72
Payroll Accounts Payable	1,007.98
Accrued Expenses	127,810.99
Federal Withholding Tax	(2,107.94)
FICA Payable	2,108.53
SUTA Payable	273.14
Principal Insurance	254.92
Health Insurance Payable	1,990.02
AFLAC Payable	77.92
Legal Shield	157.03
Workers Comp Payable	5,944.22
Accrued Leave	101,681.04
Lease Interest Payable	5,257.00
Refundable Advances	1,844.19
Deferred Revenue	2,541.25
Total Current Liabilities	369,461.01

Non-current liabilities

Short-term Lease Liability	316,523.00
Long-term Lease Liability	2,650,628.00
Lease Liability Offset	(316,523.00)
Total Non-current liabilities	2,650,628.00

Net Assets

Beginning of Year	1,032,582.20
Current Year	(1,032,435.47)
Total Net Assets	146.73
Total Liabilities & Net Assets	3,020,235.74

Agenda Item 5eii

AGENDA ITEM SUMMARY

Title	Administrative - Safety Policy
Strategic/Plans/Goals	Administrative & Strategic Planning
Action Requested	Review and Approve the Administrative - Safety Policy
Background	<p>The Workforce Development Board of the Treasure Coast, Inc., d/b/a CareerSource Research Coast (CSRC), is committed to providing employees with a safe and healthy workplace. It is the policy of CSRC that employees report unsafe conditions and do not perform work tasks if the work is considered unsafe. Employees must report all accidents, injuries, and unsafe conditions to their supervisors. No such report will result in retaliation, penalty, or other disincentive.</p> <p>Management is actively involved with employees in establishing and maintaining an effective safety policy. The primary responsibility for the coordination, implementation, and maintenance of our workplace safety policy has been assigned to the Career Center Managers.</p>
Staff Recommendations	Review and Approve the Administrative - Safety Policy
Supporting Material	Administrative - Safety Policy
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com 1-866-482-4473 ext. 418

Safety Policy

CareerSource Research Coast (CSRC) is committed to providing employees with a safe and healthy workplace. It is the policy of CSRC that employees report unsafe conditions and do not perform work tasks if the work is considered unsafe. Employees must report all accidents, injuries, and unsafe conditions to their supervisors. No such report will result in retaliation, penalty, or other disincentive.

Employee recommendations to improve safety and health conditions will be given thorough consideration by our management team. Management will give top priority to and provide the financial resources for the correction of unsafe conditions. Similarly, management will take disciplinary action against an employee who willfully or repeatedly violates workplace safety rules. This action may include verbal or written reprimands and may ultimately result in termination of employment.

The primary responsibility for the coordination, implementation, and maintenance of our workplace safety policy has been assigned to the Career Center Managers.

Management is actively involved with employees in establishing and maintaining an effective safety policy. Human Resources will serve as the safety policy coordinator and will communicate with the management team in ongoing safety and health program activities. which include:

- Promoting safety meeting participation.
- Providing safety and health education and training; and
- Reviewing and updating workplace safety rules as needed.

This policy statement serves to express management's commitment to and involvement in providing our employees with a safe and healthy workplace. This workplace safety policy will be incorporated as the standard of practice for CSRC. Compliance with the safety rules will be required of all employees as a condition of employment.

Safety Training

Workplace safety training begins on the first day of initial employment. Each employee has access to a copy of this safety policy, through his or her supervisor, for review and future reference, and will be given a personal copy of the safety rules, policies, and procedures pertaining to his or her job. Supervisors will ask questions of employees and answer employees' questions to ensure knowledge and understanding of safety rules, policies, and job-specific procedures.

All employees **will** be instructed by their supervisors that compliance with the safety is required.

Job-Specific Training

- The written Safety Policy will be reviewed with all new hires during the Onboarding/Orientation process.
- Supervisors will initially train employees on how to perform assigned job tasks safely.
- Supervisors will review with each employee the specific safety rules, policies and procedures.
- Supervisors will give employees verbal instructions and specific directions on how to do the work safely.
- Supervisors will give a tour to new hire and show the location of the First Aid kit. Supervisors are responsible for ensuring all necessary items are available in First Aid kit.
- Supervisors will observe employees performing the work. If necessary, the supervisor will provide a demonstration using safe work practices, or instruction to correct training deficiencies before an employee is permitted to do work without supervision

Periodic Retraining of Employees

All employees will be retrained periodically on safety rules, policies and procedures and when changes are made.

Individual employees will be retrained after the occurrence of a work-related injury caused by an unsafe act or work practice, and when a supervisor observes employees displaying unsafe acts, practices, or behaviors.

All training should be documented, and training records retained in the employee's personnel file.

Safety Meetings

Supervisors will conduct quarterly safety meetings with their staff. Safety meetings may be conducted on a more frequent basis if the accident history requires that additional meetings be held. In addition to the safety topic, supervisors may discuss other items such as recent accidents and injuries, results of safety inspections, and revisions of safety policies and procedures.

Documentation will be maintained at each employee safety meeting. It should contain the subjects discussed as well as an attendance sheet.

Following the safety meeting, supervisors will observe employees performing job tasks associated with the safety topic item discussed in order to see whether or not they are following the safe job procedures. If employees are observed to be following the safe procedures, they will be encouraged to continue to do so. Those found not following the procedure will receive correct feedback.

Supervisors will follow the plan of action below to ensure successful safety meetings are conducted:

A. Preparing for the meeting

Supervisors will conduct frequent inspections of the various areas and work practices and note any unsafe acts being performed or unsafe conditions that need to be corrected.

- Supervisors will select an unsafe act or condition to be used as a Safety Meeting topic for the benefit of all. A Safety Meeting can help identify and eliminate hazards before accidents occur.

B. Conduct the meeting

- Allow employees to discuss why the situation occurs.
- Reach an agreement with employees on how to eliminate or control the situation.

C. Keep a record of the meeting

- Copies of the quarterly safety meeting report forms will be sent to Human Resources.
- Quarterly Safety Meeting – Sign in sheet attached

Sample Safety Meeting Topic

Slip, Trip, And Fall Prevention

For context, slips occur when there's little to no traction between the footwear and the walking surface, causing a person to lose their balance. On the other hand, tripping happens when a person's foot hits an object or steps down to a lower, uneven surface. Any of the two can disrupt a person's balance and make them lose their footing.

Lastly, falls (being the leading cause of fatalities among construction workers) can happen to anyone if they stumble and fall too far off their center balance. This commonly occurs for those working at heights.

Common causes and risk Factors

Slips, trips, and falls can happen due to many reasons—from uneven working surfaces to unsafe ladder positions. Knowing the causes can help managers assess risk factors and devise ways to prevent them.

Here are the causes and risk factors for each:

Slips:

- Wet spills (e.g., water, mud, grease, oil, food, blood, etc.)
- Dry product spills (e.g., powder, dust, wood chips, granules, plastic wraps)
- Weather hazards (e.g., ice, snow)
- Concrete, ceramic tile, or marble floors
- Sloped or uneven walking surfaces
- Wet, muddy, greasy shoes
- Ramps or planks without skid- or slip-resistant surfaces
- Climbing ladders

Trips:

- Clutter on the floor
- Obstructed view
- Poor lighting
- Uncovered cables, wires, hoses, and extension cords
- Open drawers, cabinets, doors, etc.
- Uneven walkways
- Unmarked steps or ramps
- Missing floor tiles and bricks

Falls:

- Weak or damaged ladders
- Ledges without proper railing
- Carrying heavy objects
- Unprotected edges
- Unsafely positioned ladders

Slips, Trips, and Falls Hazards:

- Sprains and strains – When a person slips or trips and tries to catch themselves or regain balance, they may twist or stretch their muscles or ligaments, leading to sprains or strains.
- Fractures and broken bones – Falling from a height or landing forcefully on a hard surface can cause fractures or breaks in bones of the wrists, hips, and ankles.
- Contusions and bruises – Impacts with the ground or objects during a fall can cause contusions, commonly known as bruises, from damaged blood vessels beneath the skin.
- Head injuries – Falls that involve striking the head on a hard surface can cause traumatic brain injuries (TBIs), which can range from mild concussions to more severe cases.
- Cuts and lacerations – Falls may involve contact with sharp or rough objects, leading to cuts and lacerations.
- Back and spinal cord injuries (SCI) – Falls that involve landing on the back or experiencing a jarring impact can cause damage to the spine, such as herniated discs, spinal fractures, or spinal cord injuries.
- Neck injuries – These are sometimes a result of spinal injuries or damage to the muscles, ligaments, or tendons in the neck.

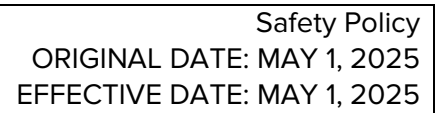
5 Tips for preventing Slips, Trips, and Falls:

Fortunately, most slip, trip, and fall incidents are avoidable. By using the right safety tools and training employees, CSRC can prevent these incidents from happening. Here are some ways to prevent slips, trips, and falls at CSRC.

1. Practicing good housekeeping – A slip-free workspace begins with housekeeping. Removing clutter helps tidy up the floor and makes it walkable for everyone in the workplace.
2. Providing adequate lighting in walking areas – Employees can navigate through spaces better if there is enough light.
3. Installing safety signs – Doing so warns people about walking in hazardous spaces to keep them safe. For example, construction safety uses warning lines, control zones, and designated areas to mark which areas are passable or restricted.
4. Cleaning spills immediately – Proper cleaning ensures that the floor is free from hazardous elements so that people can walk safely.
5. Making sure proper footwear is worn – non-slip shoes with good traction protect workers from static electricity, falling objects, explosions, exposure to hazardous substances, and other risks.

Safety/Accident Reporting Policy

Employees are responsible for reporting unsafe conditions to their immediate supervisor/manager. Supervisors/managers are responsible for correcting any hazardous conditions. Employees are to immediately report accidents, even minor ones, to their supervisors/managers and/or the Human Resources Department. Accidents involving any injury are to be documented in writing. In working with the Human Resources Department, the supervisor/manager is responsible for coordinating the completion of an "Incident Report" form and any other reports required by OSHA, State and/or local authorities. Remember: **SAFETY IS ALWAYS FIRST.**



Safety Topic _____

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD

AGENDA ITEM SUMMARY

Title	Review and Approve Employer of Record (EOR) - Award of Contract
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Board Policy/Board Responsibility
Action Requested	Review and Approve Recommendation of Rating Team for EOR
Background	<p>The current Employer of Record (EOR) contract expires on 6/30/2025. Contracts are awarded for a period of five (5) years, renewable annually, dependent upon performance.</p> <p>CareerSource Research Coast released a formal Request for Proposal for an Employer of Record with a submission deadline of April 25, 2025, for the period of July 1, 2025, through June 30, 2030.</p> <p>CSRC received three (3) proposals that passed technical review. The Review Team reviewed and discussed their evaluations of all proposals, combined the individual scores, and arrived at a composite technical score for each proposal. A rating team consisting of the Chief Financial Officer, an administrative staff member, and a board member reviewed and rated each proposal.</p> <p>The RFP/RFQ Rating Team Compilation is being proposed to the Board for review and approval. Based upon the cumulative rating score of the team, Manpower, Inc. has been determined to be the most advantageous contract award for CSRC.</p>
Staff Recommendations	Review and Approve Award of Contract for Employer of Record (EOR).
Supporting Material	RFP/RFQ Rating Team Compilation
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

Memo

Date: May 9, 2025

RE: NDWG EOR RFP 25-001-NDWG-EOR

On March 28, 2025, CareerSource Research Coast (CSRC) released a formal Request for Proposal for the National Dislocated Worker Grant (NDWG) Employer of Record contract, to be awarded for the period of July 1, 2025, through June 30, 2030.

After compiling the rating sheets from the assigned rating staff members, it was determined that Manpower received the highest score and therefore is recommended as the NDWG EOR for the period referenced in the RFP 25-001-NDWG-EOR.

Signed: **Lisa Delligatti** Digitally signed by Lisa Delligatti
Date: 2025.05.09 14:14:40 -04'00'

Lisa Delligatti – Rating team captain



INTERNAL FORM

RFP/RFQ COMPOSITE RATING SHEET

RFP/RFQ Title: National Dislocated Worker Grant Employer of RecordRFP/RFQ Number: 25-001-DWG/EORRating Team Captain: Lisa DelligattiRating Team Members: 1. Lisa Delligatti
2. Jennifer Eimann
3.
4. 2. Heidi Whybrew
4.

		Proposers						Comments
Rated Elements		KJJ, LLC dba Spherion	Waterfield	Manpower				
1	Qualifications (20 Points Max)	20.0	14.3	20.0				All vendors are qualified,
2	Understanding (20 Points Max)	20.0	19.3	20.0				
3	Cost/Clerical (10 Points Max)	9.3	5.7	8.7				Spherion was the lowest bidder however rates are subject to change for tax rate changes. Manpower was slightly higher but has historically never adjusted rates during a contract.
4	Cost/Industrial (10 Points Max)	9.3	5.7	8.7				Spherion was the lowest bidder however rates are subject to change for tax rate changes. Manpower was slightly higher but has historically never adjusted rates during a contract.
5	Experience (20 Points Max)	18.3	12.3	20.0				Manpower appears to have more overall experience. Spherion has experience with large scale recruitment projects.
6	Capacity (20 Points Max)	14.0	13.7	20.0				Both Manpower and Spherion have solid financial capacity.
TOTAL POINTS (100 POINTS MAX)		90.9	71.0	97.3	0.0	0.0	0.0	

Rating Team Captain Signature: Lisa Delligatti Digitally signed by Lisa Delligatti
Date: 2025.05.09 13:33:07 -04'00'Date: 5/9/2025

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TTD equipment via the Florida Relay Service at 711.
RFP RFQ Composite Sheet - April 2020

AGENDA ITEM SUMMARY

Title	Slate of Officers for PY 2025-2026
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 LWDB's/Board By-Laws
Action Requested	Review and Approve Slate of Officers
Background	<p>The Board's By-Laws state that the Chairperson, Vice Chairperson, and Treasurer shall be appointed annually by the Board and shall serve a one (1) year term commencing July 1. The Chairperson's and the Vice Chairperson's terms shall be limited to two (2) consecutive one (1) year terms, and the Treasurer shall be limited to four (4) consecutive one (1) year terms. There are no limitations on the number of terms not in sequence or in different offices.</p> <p>Slate of Officers:</p> <ul style="list-style-type: none">• Jim Brann - Chair• William Armstead - Vice Chair• Christi Shields - Treasurer
Staff Recommendations	Discuss and Approve Slate of Officers for PY 2025-2026
Supporting Material	By-Laws of the Workforce Board of the Treasure Coast, LWDB20
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

AGENDA ITEM SUMMARY

Title	Executive Staff Discretionary Bonuses
Strategic Plans/Goals	Administration & Strategic Planning
Policy/Plan/Law	DEO Grantee/Subgrantee Agreement /CSRC Employee Bonus Policy
Action Requested	Review and Approve Executive Staff Bonuses for PY2024-2025
Background	<p>Per the DEO Grantee/Sub-Grantee Agreement, no changes to compensation for the board's executive staff are allowed without documented Board approval and must align with local policies and procedures.</p> <p>CSRC's Employee Bonus Policy allows for discretionary, year-end bonuses for all CSRC staff of 5% of an employee's annual salary.</p>
Staff Recommendations	<p>Review and Approve Executive Staff Discretionary Bonuses of 5% for PY 2024-2025:</p> <ul style="list-style-type: none">• Brian Bauer, President/CEO• Tracey McMorris, Vice President of Operations/COO• Lisa Delligatti, CFO
Supporting Material	None - Information Only
Board Staff	<p>Brian Bauer President/CEO bbaueri@careersourcerc.com (866) 482-4473 ext. 418</p>

Agenda Item 9

AGENDA ITEM SUMMARY

Title	Department of Commerce (FLORIDACOMMERCE) - Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs from July 1, 2025 - June 30, 2026
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	CareerSource Florida Administrative Policy Number 118
Action Requested	Review and Approve the FLORIDACOMMERCE - Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs from July 1, 2025 - June 30, 2026.
Background	FLORIDACOMMERCE and the State Workforce Development Board will continue to grant the authority, on behalf of the Governor, to allow Local Workforce Development Boards to transfer up to an including 100 percent of the funds allocated to local areas for adult activities for expenditure on dislocated worker activities, and up to 100 percent of funds allocated to local areas for dislocated worker activities for expenditures on adult activities. Local Workforce Development Boards are required to ensure any transfer of funds between WIOA programs complies with federal law and to record and document their use and application of local funds.
Staff Recommendations	Review and Approve FLORIDACOMMERCE - Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs from July 1, 2025 - June 30, 2026.
Supporting Material	FLORIDACOMMERCE - Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs - July 1, 2025 - June 30, 2026.
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs
From July 1, 2025 through June 30, 2026

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

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

Adult and Dislocated Worker Transfer Request

Program Year	Program	Total Award Amount	Amount of Adult Requested to be Spent on DW	Percentage of Adult Requested to be Spent on DW	Amount of DW Requested to be Spent on Adult	Percentage of DW Requested to be Spent on Adult
2024	DLW	924,016.00	0.00	0	877,000.00	95%

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

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

LWDB 20 anticipates to fully expend the WIOA Adult - 2025 funding prior June 2026 and requests the ability to utilize up to \$877,000 of WIOA DLW - 2024 funding to be spent on PY25-26 WIOA Adult expenditures.

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

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

Labor market conditions contributing to the need for the transfer:

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

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

LWDB20 WIOA DW 2024 funding transfer to WIOA Adult 2025 in the amount stated would allow for an estimated 152 additional WIOA Adult participants to be served in PY25-26. The resulting

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

I certify the following:

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

I certify the above information is true and correct.

Signature of Board Chair

Print Name

Date

Agenda Item 10

AGENDA ITEM SUMMARY

Title	LWDB 20 Primary Indicators of Performance - 2nd Quarter PY 2024-2025
Strategic Plans/Goals	Clear, Credible, and Trustworthy Commitments and Projects
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA) Title I Programs and Title III Wagner-Peyser (WP) Act; Training and Employment Guidance Letter No. 09-20
Action Requested	None - Information Only
Background	<p>The State of Florida must negotiate and agree upon performance levels for WIOA, and WP programs funded by the United States Department of Labor, Employment, and Training Administration. Once the state levels are established, the Department of Commerce (FLORIDACOMMERCE) must negotiate and reach agreements with the Local Workforce Development Boards for their local performance targets.</p> <p>Staff will review CareerSource Research Coast's performance for the 2nd quarter of PY 2024-2025.</p>
Staff Recommendations	None - Information Only
Supporting Material	LWDB 20 PY 2024-2025 2nd Quarter Performance
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

Measures	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	PY2024-2025 1st Quarter Performance	PY2024-2025 % of Performance Goal Met For Q1	PY2024-2025 2nd Quarter Performance	PY2024-2025 % of Performance Goal Met For Q2	PY2024-2025 Performance Goals
Adults:														
Employed 2nd Qtr After Exit	93.50	102.07	93.80	102.40	94.70	103.38	94.70	103.38	91.60	97.6	104.61	97.1	104.07	93.3
Median Wage 2nd Quarter After Exit	\$12,798	139.06	\$12,901	140.18	\$12,301	133.66	\$13,000	141.26	\$9,203	\$13,586	137.43	14129	142.92	\$9,886
Employed 4th Qtr After Exit	85.90	94.29	91.00	99.89	90.70	99.56	93.80	102.96	91.10	92.6	101.65	93.3	102.41	91.1
Credential Attainment Rate	89.60	101.82	94.70	107.61	94.40	107.27	94.30	107.16	88.00	95.5	111.44	94.1	109.80	85.7
Measurable Skill Gains	80.60	94.49	79.40	93.08	80.30	94.14	99.30	116.41	85.30	77.3	108.57	89.9	126.26	71.2
Dislocated Workers:														
Employed 2nd Qtr After Exit	92.90	105.57	81.80	92.95	100.00	113.64	100.00	113.64	88.00	100	108.70	100	108.70	92
Median Wage 2nd Quarter After Exit	\$9,784	113.27	\$9,749	112.86	\$9,399	108.81	\$9,749	112.86	\$8,638	\$11,382.50	113.83	9945.5	99.46	\$10,000
Employed 4th Qtr After Exit	82.10	88.76	92.30	99.78	92.90	100.43	90.90	98.27	92.50	100	109.89	100	109.89	91
Credential Attainment Rate	88.20	116.98	85.70	113.66	85.70	113.66	100.00	132.63	75.40	100	112.11	100	112.11	89.2
Measurable Skill Gains	81.80	105.82	75.00	97.02	75.00	97.02	100.00	129.37	77.30	90.9	113.77	88.9	111.26	79.9
Youth:														
Employed 2nd Qtr After Exit	73.50	90.52	77.80	95.81	82.50	101.60	87.30	107.51	81.20	90	111.66	90.5	112.28	80.6
Median Wage 2nd Quarter After Exit	\$4,158	127.49	\$3,935	120.67	\$4,321	132.49	\$4,830	148.11	\$3,261	\$4,523.50	129.24	4802	137.20	\$3,500
Employed 4th Qtr After Exit	65.50	83.12	78.40	99.49	82.40	104.57	85.70	108.76	78.80	90.5	123.97	90.9	124.52	73
Credential Attainment Rate	100.00	113.38	85.00	96.37	75.50	85.60	79.50	90.14	88.20	81.3	92.18	87.2	98.87	88.2
Measurable Skill Gains	95.20	117.53	96.40	119.01	90.60	111.85	98.80	121.98	81.00	90.1	104.40	90.2	104.52	86.3
Wagner Peyser:														
Employed 2nd Qtr After Exit	64.40	98.62	63.80	97.70	63.90	97.86	63.60	97.40	65.30	64.9	97.89	65.5	98.79	66.3
Median Wage 2nd Quarter After Exit	\$7,208	130.10	\$7,424	134.01	\$7,239	130.67	\$7,426	134.04	\$5,540	\$7,535	136.01	7716	122.57	\$6,295
Employed 4th Qtr After Exit	62.30	99.52	61.20	97.76	61.90	98.88	62.50	99.84	62.60	63	100.64	62.5	100.64	62.1
Not Met (less than 90% of negotiated)														
Met (90-100% of negotiated)														
Exceeded (greater than 100% of negotiated)														

AGENDA ITEM SUMMARY

Title	Letter Grade - Performance Update 2nd Quarter - PY 2024-2025
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/Role of
Action Requested	LWDB's None - Information Only
Background	<p>The Reimagining Education and Career Help (REACH) Act calls for each local workforce development board in Florida to be assigned a letter grade annually based on performance criteria developed by the Governor's REACH Office. The CareerSource Florida Board of Directors assigns and makes public a letter grade for each local workforce development board.</p> <p>Letter grades are assigned to local workforce development boards annually by Oct. 15, following the close of the program year. Below is the link to the 2nd Quarter performance update by local workforce development board for the program year 2024-2025.</p>
Staff Recommendation	None - Information Only
Supporting Material	Link to: https://analytics.careersourceflorida.com/LetterGrades/Performance
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

Agenda Item 12

AGENDA ITEM SUMMARY

Title	One-Stop Operator Combined Quarterly Report 3rd Quarter - PY 2024-2025
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 - Q3 - P2024-2025
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

One-Stop Operator Quarterly Report
Second Quarter Program Year 2024-25
Date: 01/10/2025

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 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, worked with each of the Comprehensive One-Stop Partners 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 Division of Blind Services.

WCC sent the amended MOU to our Division of Blind Services (DBS) Partner contact on 12/4/2024, along with the signature page. Follow up on the status of signature was made on 1/6/2025 with no reply. WCC has conferred with CSRC CEO regarding this matter. CSRC CEO, Brian Bauer, spoke with State Officials regarding the lack of signature on the MOU/IFA and was informed this issue is under review as other Workforce Boards are experiencing this problem.

IFA – Currently, due to the lack of space available at the Comprehensive One-Stop Career Center, Partners are providing a virtual presence. Because partners do not have an actual presence at the Career Center, invoicing has been postponed until further notice.

3. Coordination and Collaboration Activities

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

The Program Year 24-25 Third Quarter Meeting was held in person at the main campus of Indian River State College on 3/26/2025. The meeting was attended by the Partners and their staff with an absence of AARP. A meeting Agenda was prepared and shared with all. Partners were thanked for their cooperation during this time the Comprehensive Career Center is transitioning into a new venue. Discussion followed on the progress of the move to the larger venue which is expected to occur in May. A discussion followed regarding the virtual services delivery the partners are providing. Gregory McDonald, CSRC, distributed a handout regarding an Attendance Log which the partners can utilize to document their participation in the virtual services delivery. This Attendance Log has been emailed to all partners. Partners were asked about the customer participation they are experiencing through virtual services delivery. All partners reported that customer participation has been poor.

Partners were reminded of their responsibilities as Partners in the One-Stop System and discussion

One-Stop Operator Quarterly Report
Second Quarter Program Year 2024-25
Date: 01/10/2025

followed regarding the schedule for virtual services, reporting, referrals utilizing the Crosswalk system and results of the Customer Satisfaction Survey. Questions, answers and comments were addressed.

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” and the IFA has been updated and finalized by all partners for the July 2024 through June 2027 time period and all Partner Agency Officials have provided signature with the exception of the Department of Blind Services (DBS). An update on the status of steps taken to obtain the DBS signature was provided to the Partners.

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 - Utilizing the strategies determined at the CSRC and Workforce Coordination Consulting quarterly meetings, there were no results for this third quarter.

Client Referrals - During the third quarter of Program Year 24-25 there were 17 referrals from the One-Stop System partners. CSRC referred 15 customers to other partner services and received 76 referrals. Indian River State College referred one customer to other partner services. The Department of Vocational Rehabilitation received four referrals and referred on customer to other partner services. 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. 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. WCC plans to monitor the Comprehensive One-Stop Career Center System in the third quarter of the 2024 -2025 Program Year.

6. Recommendations

It was recommended the Partners utilize the Google Attendance Log to document their participation in the virtual services delivery. This Attendance Log has been emailed to all partners. Gregory and Dale, Managers at the Comprehensive One-Stop Career Center, suggested that they would explore a “Bookings Page” for Partners to more easily establish their virtual service delivery dates and times.

Workforce Coordination Consulting, LLC
COMPREHENSIVE ONE-STOP CAREER CENTER
Indian River State College Main Campus
3209 Virginia Avenue, Ft. Pierce FL
Building Y, Room 108

3rd QUARTER PARTNERS MEETING AGENDA
MARCH 26,2025
10:00 AM

1. Welcome and Introductions
2. Crosswalk/Referrals
3. Review of Virtual Services Delivery
4. Update on Status of Signatures on updated Memorandum of Understanding/Infrastructure Funding Agreement
5. Customer Satisfaction Survey
6. PartnerUpdates:
 - 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
 - h. CareerSource Research Coast
7. Open Discussion
8. Next Meeting/Possible Dates TBA

COMPREHENSIVE ONE-STOP CAREER CENTER QUARTERLY PARTNERS MEETING 3/26/2025 MINUTES

The Partner's Meeting was held at the main campus of Indian River State College, Building Y, Room 108

The Partner's Meeting was attended by the following:

- Glenda Harden, Workforce Coordination Consulting, LLC.
- Dale Shepperson, CareerSource Research Coast
- Gregory McDonald, CareerSource Research Coast
- Troy Shearer, Indian River State College
- Shameka Smith, Vocational Rehabilitation
- Betty Guerrero, Farmworker Career Development Program, Indian River State College
- Lezlee Almendarez, Farmworker Career Development Program, Indian River State College
- Jenny Champagne, Economic Opportunities Center, Indian River State College
- Shatoya Bradly, St. Lucie County Community Services
- Sherika Perez, Division of Blind Services
- Tania Esten, Division of Blind Services

AARP was not in attendance.

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

The Crosswalk Referral System was discussed. Workforce Coordination Consulting requests that each partner send a monthly/quarterly report regarding the referrals they have made to their customers to other organizations. Partners were reminded to send this report in a timely manner.

Partners were thanked for their cooperation during this time the Comprehensive Career Center is transitioning into a new venue. Glenda, Gregory and Dale commented on the progress of the move to the larger venue which is expected to occur in May. A discussion followed regarding the virtual services delivery the partners are providing. Gregory distributed a handout regarding an Attendance Log which the partners can utilize to document their participation in the virtual services delivery. This Attendance Log has been emailed to all partners. Partners were asked about the customer participation they are experiencing through virtual services delivery. All partners reported that customer participation has been poor. Gregory and Dale, Managers at the Comprehensive One-Stop Career Center, suggested that they would explore a "Bookings Page" for Partners to more easily establish their virtual service delivery dates and times.

An update on the status of signatures on the updated MOU/IFA was discussed. CareerSource

President and CEO has spoken to officials at the State Level regarding the lack of signature by the Division of Blind Services and was informed it is under review for signature.

The Customer Satisfaction Survey was discussed. There were still no results for this third quarter.

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

Shatonya, St. Lucie County Human Services, reported applications for their rental assistance program will begin in April. The rental assistance program is available for the City of Ft. Pierce and has expanded to incorporated Port St. Lucie. Shatonya will send the link for the program to partners.

Troy reported IRSC is focusing on fall enrollment and on April 29th an Open House will be held at the Eastman Complex with 16 educational/vocational programs present. Troy invited all partners to attend to represent their programs and services. Troy will send partners the flyer regarding the Open House. IRSC has a new Certification Program, a Hybrid Vehicle Maintenance Program offering 21 credits. The program resulted as local industry worked with IRSC in order to provide the workforce they need. The Carpentry Program is referring their students to Apprenticeship positions. The Welding Program is selective admission with 20 to 30 seats available for students.

Jenny, Economics Opportunities Center, IRSC, reported the program can cover the cost of GED exams.

Shameka, Vocation Rehabilitation, reported regarding their Transition Services for Youth which consists of job shadowing, interviewing techniques and training.

Betty, Farmworker Development Program, IRSC, introduced Lezlee as their new Case Manager. The program is now fully staffed! The program now has office space at the IRSC Chastain Campus. Betty will share the new flyers developed to inform the public about their program and services.

Gregory, CareerSource, reported that workshops are available virtually on Tuesdays. One on one appointments can be requested by customers for assistance in registering in the Employ Florida System, job search and the reemployment services.

The meeting adjourned at 11:05 am.

Agenda Item 13

AGENDA ITEM SUMMARY

Title	Workforce Readiness Taskforce 1st Quarter - 2025 Report
Strategic Plans/Goals	Administration & Strategic Planning
Policy/Plan/Law	CareerSource Florida Strategic Policy - Education and Industry Consortiums
Action Requested	Review Workforce Readiness Taskforce (Education and Industry Consortium) Quarterly 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) 1st Quarter Report
Supporting Material	Workforce Readiness Taskforce 1st Quarter - 2025 Report
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

LWDB 20, CareerSource Research Coast (CSRC) Workforce Readiness Taskforce QUARTERLY REPORT

A. GENERAL INFORMATION

Report quarter: Quarter 1, 2025

Date of meeting: March 6, 2025

Report prepared by: Christina Coble, CSRC Business Services Manager

Local workforce development board contact: Christina Coble, Business Services Manager

Date 03/27/2025

B. ATTENDANCE

Name	Organization	Industry or Education Organization	Contact Information
Bill Wilcox	Phoenix Metal Products	Manufacturing	772-595-6586 Bill.wilcox@earthlink.net
Karen Giovengo	HCA Lawnwood Hospital	Healthcare	772-468-4500 Karen.giovengo@healthcare.com
Lana Barros	Martin County School District	Martin County School District	772-219-1200 barrosl@martinschools.org
Prashanth Pilly	Indian River State College	Indian River State College	772-462-7212 ppilly@irsc.edu
Anita Fischer (guest)	Economic Development Council of St. Lucie County	Economic Development Council of St. Lucie Council of St. Lucie County	
Ann Hubbard (guest)	Indian River State College	Indian River State College	

Helene Caseltine (guest)	Indian River County Chamber of Commerce	Indian River County Chamber of Commerce	
Jessica Warren (guest)	Martin County School District	Martin County School District	
Christina Coble	CareerSource Research Coast	CareerSource Research Coast	
Jennifer Eimann	CareerSource Research Coast	CareerSource Research Coast	

B. SUMMARY REPORT

1. Summary analysis of the local labor market based on the industry representative needs and education offerings. (Provide summary)

Consortium member Bill Wilcox shared that as an employer in the manufacturing industry, he sees a lack of soft skills like communication, problem-solving, and adaptability which are crucial, alongside technical skills, for a successful and productive workforce. Discussion among the attendees ensued, and this seems to be an overriding concern among all targeted industries.

To delve more deeply into the needs and challenges of each targeted industry, a suggestion was made, and discussion ensued regarding conducting industry-specific targeted meetings over the next year in order to spend more time discussing the specific needs and solutions for that industry. In addition to Consortium members, additional education and industry representatives tied to that industry will be invited to participate in each industry's meeting so a wider range of experiences and knowledge can be shared.

Consortium members and Consortium Chair, Prashanth Pilly, agreed to proceed with this plan for upcoming meetings.

2. Information on priority industry sectors and occupations for the local area. (Provide summary)

An update was provided regarding the Master Credentials List. The Master Credentials List serves as a public and transparent inventory of state-approved credentials of value, directs the use of federal and state funds for workforce education and training programs that lead to approved credentials of value, and guides workforce education and training programs by informing the public of the credentials that have value in the current or future job market.

Christina Coble explained that the Master Credentials List application is open year-round for local workforce development boards to submit credentials for consideration and challenge those flagged for removal in conjunction with employers, Florida school districts, and Florida College System institutions.

Credentials flagged for removal from the Master Credentials List will not be removed for two years after they are flagged, so there is time for the consortium members/industry partners to discuss further how their removal from the Master Credentials List could impact credentialing requirements for hiring purposes and submit documentation to have them reinstated under local demand criteria.

Previously, flagged credentials would be removed in a one-year time frame. Additionally, the state's most recent Local Targeted Occupations List is now used when determining demand for credentials, allowing for reinstating many credentials previously flagged for removal.

Currently, 144 credentials are flagged for removal from the Master Credentials List, meaning that they're on the list currently but are at risk of being removed.

3. Information on the status of existing talent pipelines for in-demand occupations. (Provide summary)

Lana Barros, Director of Innovation & Choice, presented the Martin County School District's five-year strategic plan to the Consortium. The following information was provided:

Martin County's Strategic Plan was designed to address the district's needs, be flexible, and support each school's improvement plan and the District's Accreditation over the next five years, and emphasizes data-driven resource allocation, stakeholder engagement, and preparing students for future careers through career and technical education. Martin County School District focuses on five strategic themes to guide systemic priorities and initiatives, aiming to become Florida's preeminent school system.

- **Envisioning:** Engage team members and stakeholders in future thinking to go beyond short-term fixes and imagine what your school can be
- **Planning:** Create a plan that closes the gaps between your current reality and your vision for the future
- **Implementing:** The theory of action will guide concrete action steps with clear roles and responsibilities for your team
- **Evaluating:** Evaluate how successfully your plan was implemented, analyze outcomes, and adjust the next steps

The implementation phase is underway, and metrics have been established to track progress in equipping students with the necessary skills and certifications for local job markets and post-secondary education.

A significant focus of Ms. Barros' presentation was on the effectiveness of workplace readiness initiatives. Ms. Barros highlighted a notable increase in college and career readiness metrics linked to the Florida Ready to Work program, although challenges remain in securing internships due to business hesitance.

Prashanth Pilly stressed the need for employers to adapt to the evolving needs of students. The conversation also touched on the planned Career Readiness Summit, which aims to align educational outcomes with industry requirements.

Agenda Item 14

AGENDA ITEM SUMMARY

Title	Chair's Report
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Board Procedure
Action Requested	None - Information Only
Background	The Chairperson will share information at the meeting with the Board.
Staff Recommendations	None - Information Only
Supporting Material	None- Information Only
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com 1-866-482-4473 ext. 418

Agenda Item 15

AGENDA ITEM SUMMARY

Title	Presidents Report
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 16

AGENDA ITEM SUMMARY

Title	Open to the Board
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Board Procedure
Action Requested	None - Information Only
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 - Information Only
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

Agenda Item 17

AGENDA ITEM SUMMARY

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