



Executive Committee

MEETING AGENDA

Meeting Details

Date: Friday, June 13, 2025

Time: 8:00 am

Location: Teams Virtual Meeting

MS Teams Virtual Meeting Access:

Access Code: 914 675 711#

Phone: 772-800-5467

URL: [Join the meeting now](#)

Opening Remarks

1. Welcome & Attendance
2. Conflict of Interest Declaration

Voting Items

3. Review and Approve Financial Statements - April 2025
4. Review and Approve Draft Budget - PY 2025-2026
5. Review and Approve Jobs for Veterans State Grants (JVSG) - Employment and Advocacy Services Policy Revisions
6. Review & Approve Workforce Innovation and Opportunity Act (WIOA) - Individual Training Account (ITA) Policy Revisions
7. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - On-The-Job Training Program Policy Revisions
8. Review and Approve Wagner Peyser (WP) - Job Orders and Placements Policy Revisions
9. Review and Approve Wagner Peyser (WP) - Job Seeker Registration, Application, and Services Policy Revisions
10. Review and Approve Risk Evaluation Form Subrecipient Services - WIOA Youth Services Contract Renewal - PY 2025-2026
11. Review and Approve Renewable Vendor Contracts - PY 2025-2026
 - Manpower
 - Taylor, Hall, Miller, Parker (THMP)
 - LippesMathias, Attorneys at Law - Employment
 - James Moore, CPA
12. Review and Approve Board Member Contract/COI Exemption Requests - PY 2025-2026

13. Review and Approve Board and Committee Schedule - PY 2025-2026
14. Review and Approve CSRC Paid Holidays Memo and Compressed Work Schedule - PY 2025-2026

Information/Discussion

15. Review and Approve Board of Directors Membership Recertification - PY2025-2026
16. CareerSource Research Coast (CSRC) Updates
 - WIOA LWDB Local Plan and Regional Plan Approval
17. Adjournment - Next Executive Meeting - July 11, 2025

Agenda Item 2

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

collaborate.

innovate.

lead.

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

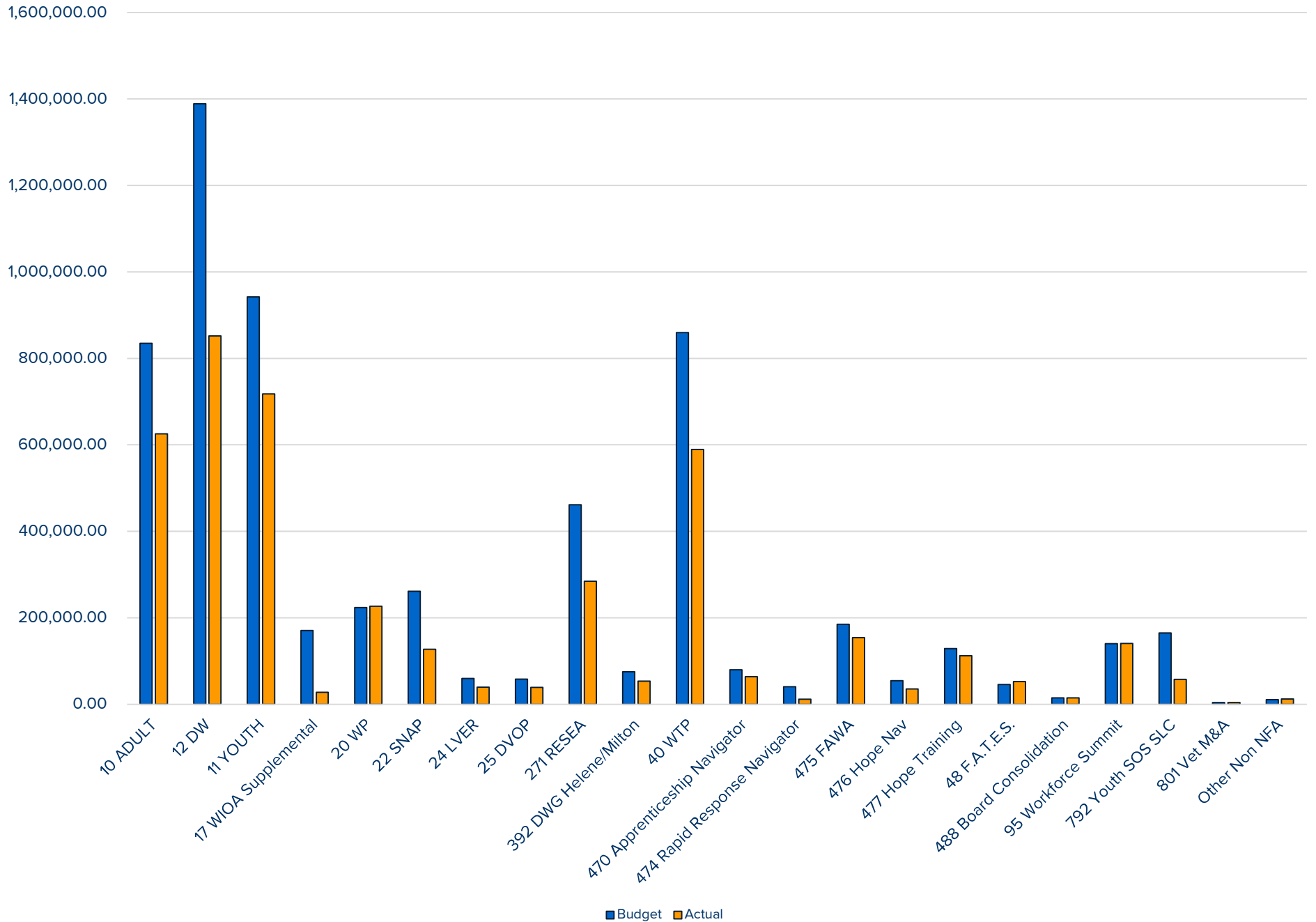
LWDB 20
Summary of Funding and Expenditures
as of April 30, 2025

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		\$ 593,500	\$ 20,100	\$ -	\$ 35,938	\$ 132,395	\$ 53,575	\$ 17,711	\$ 13,207	\$ 149,272	\$ 53,740	\$ 342,681	\$ 60,900	\$ 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	\$ 840,068	\$ 713,512	\$ -	\$ 101,125	\$ 76,500	\$ 20,463	\$ 24,529	\$ 122,540	\$ -	\$ 265,803	\$ -	\$ -
Total DEO Grant Funding		\$ 601,526	\$ 860,168	\$ 713,512	\$ 35,938	\$ 233,519	\$ 130,075	\$ 38,174	\$ 37,735	\$ 271,812	\$ 53,740	\$ 608,484	\$ 60,900	\$ 10,750
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL		\$ 601,526	\$ 860,168	\$ 713,512	\$ 35,938	\$ 233,519	\$ 130,075	\$ 38,174	\$ 37,735	\$ 271,812	\$ 107,480	\$ 608,484	\$ 60,900	\$ 10,750
% of Total Budgeted Funding Received		72.04%	61.95%	75.74%	21.07%	104.33%	49.80%	64.17%	64.64%	58.90%	143.31%	70.78%	76.13%	26.49%
EXPENDITURES														
Administrative	\$ -	\$ 63,114	\$ 88,246	\$ 16,064	\$ 26,722	\$ 74,463	\$ 18,319	\$ 4,399	\$ 4,353	\$ 40,880	\$ 8,202	\$ 84,989	\$ 9,322	\$ 1,686
Salaries and Benefits	\$ 377,973	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 148,954	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (526,926)	\$ 231,673	\$ 10,572	\$ 16,064	\$ -	\$ 10,247	\$ 18,319	\$ 4,399	\$ 4,353	\$ 40,880	\$ 8,202	\$ 84,989	\$ 9,322	\$ 1,686
Reclassification	\$ -	\$ (168,559)	\$ 77,675	\$ -	\$ 26,722	\$ 64,216	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ 562,345	\$ 763,717	\$ 701,943	\$ 1,014	\$ 152,096	\$ 108,943	\$ 34,941	\$ 34,550	\$ 243,450	\$ 45,538	\$ 504,116	\$ 54,403	\$ 10,060
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 608,407	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 199,806	\$ 614,516	\$ 28,566	\$ 13,884	\$ -	\$ 21,171	\$ 72,628	\$ 4,466	\$ 5,266	\$ 168,274	\$ 3,749	\$ 284,541	\$ 40,846	\$ 7,841
Contract Labor	\$ -	\$ 7,866	\$ 358	\$ -	\$ -	\$ 47	\$ 5,633	\$ 19	\$ 28	\$ 14,168	\$ 10,000	\$ 45,806	\$ 279	\$ 93
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,875	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ 672	\$ 36	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,416	\$ -	\$ -
Support Services ITA	\$ -	\$ 37,970	\$ 1,959	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 100	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ 254,311	\$ 9,899	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,595	\$ -	\$ -
Training-OJT	\$ -	\$ 173,179	\$ 6,486	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 27,946	\$ -	\$ -	\$ -
Travel	\$ 632	\$ 3,106	\$ 138	\$ 570	\$ -	\$ 441	\$ 1,100	\$ 4,383	\$ 2,445	\$ 816	\$ 5	\$ 2,394	\$ 363	\$ 40
One Stop Shared Costs	\$ -	\$ 75,182	\$ 3,552	\$ -	\$ -	\$ 36,552	\$ 11,671	\$ 22,140	\$ 22,824	\$ 29,544	\$ 359	\$ 48,899	\$ 6,212	\$ 932
Other Operating Expenses	\$ 32,037	\$ 69,587	\$ 5,507	\$ 71,995	\$ -	\$ 15,619	\$ 9,829	\$ 1,992	\$ 2,066	\$ 12,612	\$ 28	\$ 73,994	\$ 2,590	\$ 410
Allocated Program Indirect	\$ (232,474)	\$ 102,212	\$ 4,664	\$ 7,087	\$ -	\$ 4,521	\$ 8,082	\$ 1,941	\$ 1,920	\$ 18,036	\$ 3,599	\$ 37,496	\$ 4,113	\$ 744
Reclassification	\$ -	\$ (776,255)	\$ 702,552	\$ -	\$ 1,014	\$ 73,745	\$ -	\$ -	\$ -	\$ -	\$ (149)	\$ -	\$ -	\$ -
Total Expenditures	\$ 0	\$ 625,459	\$ 851,963	\$ 718,008	\$ 27,737	\$ 226,560	\$ 127,263	\$ 39,340	\$ 38,903	\$ 284,329	\$ 53,740	\$ 589,105	\$ 63,725	\$ 11,746
Funding Over/(under) expenditures	\$ 0	\$ (23,933)	\$ 8,205	\$ (4,496)	\$ 8,202	\$ 6,960	\$ 2,813	\$ (1,166)	\$ (1,167)	\$ (12,517)	\$ 53,740	\$ 19,379	\$ (2,825)	\$ (996)
YTD % of Budgeted Funds Expended		74.91%	61.36%	76.22%	16.26%	101.22%	48.72%	66.13%	66.64%	61.61%	71.65%	68.52%	79.66%	28.94%

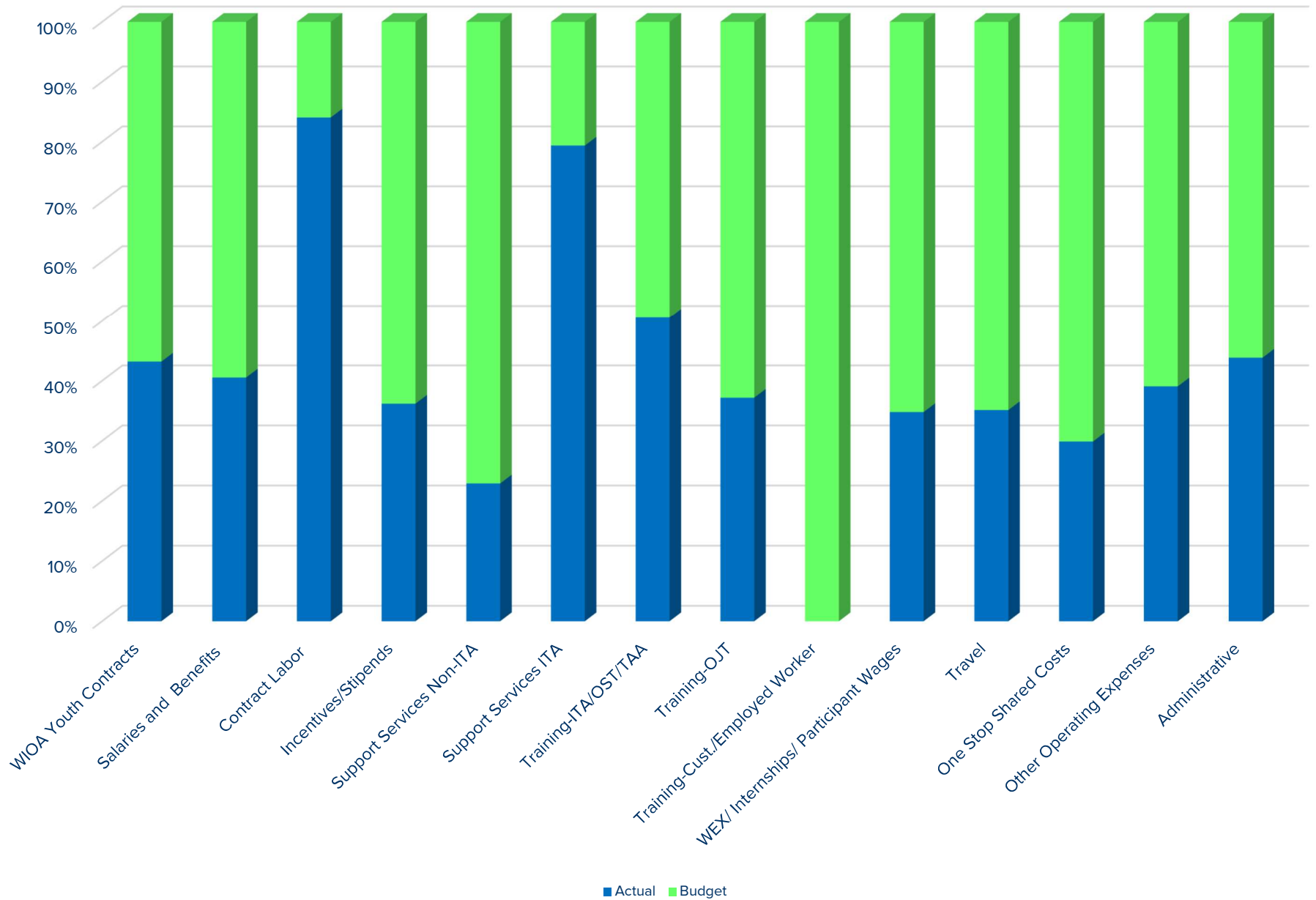
LWDB 20
Summary of Funding and Expenditures
as of April 30, 2025

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	\$ -	\$ -	\$ 1,642,211	\$ 5,658,689	\$ 4,016,478	29.021%
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	\$ 152,463	\$ 28,006	\$ 115,565	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,468,599	\$ 3,127,585		
Total DEO Grant Funding	\$ 152,463	\$ 28,006	\$ 115,565	\$ -	\$ 15,000	\$ 4,008	\$ 139,434	\$ -	\$ -	\$ 4,110,810	\$ 5,894,265		
OTHER NON DEO REVENUES	\$ -	\$ -	\$ -	\$ 135,239	\$ -	\$ -	\$ -	\$ 46,425	\$ 29,317	\$ 210,981	\$ 310,757	\$ 99,776	67.893%
TOTAL	\$ 152,463	\$ 28,006	\$ 115,565	\$ 135,239	\$ 15,000	\$ 8,016	\$ 139,434	\$ 46,425	\$ 29,317	\$ 4,321,791	\$ 6,205,022	\$ 1,883,232	69.650%
% of Total Budgeted Funding Received	82.49%	51.12%	89.59%	294.34%	100.00%	200.00%	99.60%	28.14%	272.54%	69.65%			
EXPENDITURES										PY 24-25 Actual	PY 24-25 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ 22,706	\$ 5,191	\$ 16,232	\$ 7,926	\$ 2,335	\$ -	\$ 21,358	\$ 8,574	\$ 1,845	\$ 526,926	\$ 674,672	\$ 147,658	78.10%
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 377,973	\$ 511,554	\$ 133,581	73.89%
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 148,954	\$ 163,118	\$ 14,164	91.32%
Allocated Indirect Costs	\$ 22,706	\$ 5,191	\$ 16,232	\$ 7,926	\$ 2,433	\$ -	\$ 21,358	\$ 8,574	\$ 1,845	\$ 44	\$ 0	\$ (44)	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ (98)	\$ -	\$ -	\$ -	\$ -	\$ (44)	\$ -	\$ (44)	
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Program Training	\$ 131,364	\$ 30,102	\$ 96,142	\$ 44,535	\$ 12,665	\$ 4,008	\$ 119,162	\$ 48,865	\$ 10,584	\$ 3,714,546	\$ 5,473,288	\$ 1,758,742	67.9%
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 608,407	\$ 800,000	\$ 191,593	76.1%
Salaries and Benefits	\$ 57,391	\$ 22,694	\$ 71,979	\$ 3,794	\$ -	\$ -	\$ -	\$ 2,042	\$ 3,741	\$ 1,627,196	\$ 2,386,589	\$ 759,394	68.2%
Contract Labor	\$ 1,180	\$ 68	\$ 867	\$ 46	\$ -	\$ -	\$ -	\$ 2,635	\$ -	\$ 89,092	\$ 16,903	\$ (72,189)	527.1%
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,875	\$ 12,126	\$ 5,251	56.7%
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ 25	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,149	\$ 10,600	\$ 7,451	29.7%
Support Services ITA	\$ -	\$ -	\$ -	\$ 4,199	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 44,228	\$ 11,500	\$ (32,728)	384.6%
Training-ITA/OST/TAA	\$ -	\$ -	\$ -	\$ 31,994	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 297,799	\$ 290,957	\$ (6,842)	102.4%
Training-OJT	\$ -	\$ -	\$ 665	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 180,329	\$ 304,638	\$ 124,308	59.2%
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	\$ 18,130	\$ 33,500	\$ 15,370	54.1%
One Stop Shared Costs	\$ 9,575	\$ 2,875	\$ 12,654	\$ 467	\$ -	\$ -	\$ -	\$ 133	\$ -	\$ 283,571	\$ 665,167	\$ 381,596	42.6%
Other Operating Expenses	\$ 52,640	\$ 2,146	\$ 1,781	\$ 504	\$ 12,500	\$ 4,008	\$ 109,739	\$ 1,277	\$ 6,019	\$ 488,878	\$ 762,562	\$ 273,684	64.1%
Allocated Program Indirect	\$ 10,018	\$ 2,290	\$ 7,161	\$ 3,497	\$ 1,073	\$ -	\$ 9,423	\$ 3,783	\$ 814	\$ 0	\$ 3,324	\$ -	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ (908)	\$ -	\$ -	\$ -	\$ -	\$ 0	\$ -	\$ 0	
Total Expenditures	\$ 154,071	\$ 35,294	\$ 112,373	\$ 52,461	\$ 15,000	\$ 4,008	\$ 140,520	\$ 57,440	\$ 12,429	\$ 4,241,472	\$ 6,147,960	\$ 1,906,400	69.0%
Funding Over/(under) expenditures	\$ (1,607)	\$ (7,288)	\$ 3,192	\$ 82,778	\$ -	\$ 4,008	\$ (1,086)	\$ (11,014)	\$ 16,887	\$ 80,319			
YTD % of Budgeted Funds Expended	83.36%	64.42%	87.11%	114.18%	100.00%	100.00%	100.37%	34.81%	115.55%	68.36%			

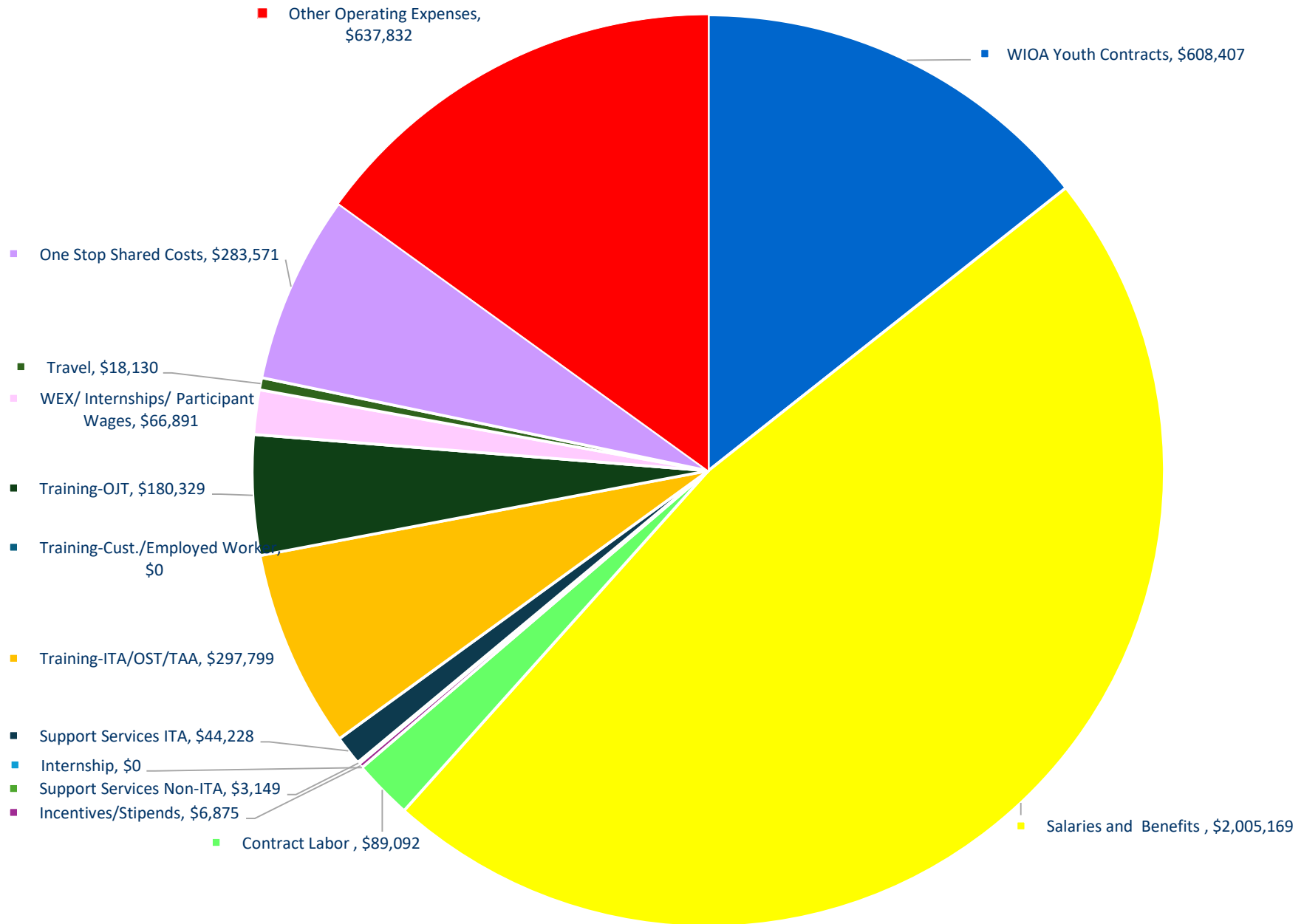
Budget to Actual by Program



Expenditures by Category



Expenditure Categories



AGENDA ITEM SUMMARY

Title:	Review and Approve 2025-2026 Draft Budget
Strategic Goal:	Optimal Use of Resources
Policy/Plan/Law:	Workforce Innovation & Opportunity Act: Role of Local Workforce Boards
Action Required:	Review and Approve Preliminary Budget for PY 2025-2026
Background:	<p>Each year, the Board approves a budget for the following program year. Board Staff has received preliminary allocations for the WIOA, Wagner Peyser, and Welfare Transition programs for PY 2025-2026. The Finance department meets with Executive Management staff, and drafts a projected budget to present to the Board of Directors based on this preliminary information.</p> <p>Attached is a copy of the draft budget for the Executive Committee's review and approval. The Board will have the opportunity to approve the 2025-2026 budget at the Annual meeting on June 25, 2025.</p>
Staff Recommendation:	Approve the preliminary draft budget for PY 2025-2026
Supporting Materials:	Draft Budget PY 2025-2026
Board Staff:	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418



Program Year 2025-2026 Budget

NARRATIVE OF EXPENDITURE CATEGORIES

ADMINISTRATIVE

This category represents the administrative portion of Indirect Costs. It includes fiscal audit and monitoring fees, costs related to providing support to the governing board, strategic planning, and administrative staff salaries and benefits that cannot be specifically identified with a specific grant.

WIOA YOUTH CONTRACT

The subrecipient for the WIOA Youth program for PY24-25 is Eckerd Connects.

SALARIES AND BENEFITS

This category contains the salaries, payroll taxes, insurances (health, vision, dental, short-term disability, and life), CSRC 401K match, and workers compensation.

CONTRACT LABOR

Costs for Employer of Record temporary to conversion employees as well as any temporary positions for limited projects.

INCENTIVES AND STIPENDS

Cost reported in this category represent incentives earned by Welfare Transition participants as well as any stipends paid to participants. Youth Summer of Success participant incentives are included in this category as well.

SUPPORT SERVICES NON-ITA

This category represents supportive services which are not included in the Federal or State ITA categories. This includes but is not limited to: Assistance with transportation not related to training, assistance with child and dependent care, assistance with housing, needs related payments, legal services, and other supportive services to allow participants to engage in career services leading to employment.

SUPPORT SERVICES ITA

Supportive services required for participation in a training program, including but not limited to: books, fees, equipment, supplies, uniforms, transportation necessary to attend training, drug tests, physicals, background checks, application, graduation, and GED fees, and license and exam fees.

TRAINING – ITA/OST/TAA

This category represents the training and training certain support costs for participants. This includes Individual Training Accounts (ITA).

TRAINING- OJT

On the Job Training (OJT) reimbursements paid to employers based on individual OJT training plans.

TRAINING-CUST/EMPLOYED WORKER

Expenditures for customized training plans and employed worker training agreements.

WEX/INTERNSHIPS/PARTICIPANT WAGES

Included in this category are Work Experience (other than WIOA Youth), Internships for participants and participant wages. Participant wages are generally Youth Summer of Success wages reimbursed to the EOR.

TRAVEL

This category includes employee paid mileage (based on the state approved rate), hotel, transportation and other allowed charges to attend meetings, conventions and the annual Workforce Summit.

ONE STOP COSTS

All costs associated with the operation of CSRC's One Stop Centers and mobile units. This may include but is not limited to facility and equipment rent, utilities, supplies, repairs, maintenance, and security.

OTHER OPERATING COSTS

This category represents the Administrative Office costs. This may include but is not limited to facility and equipment rent, utilities, non-capitalized equipment, staff development and training, dues and memberships, service charges and fees, marketing, professional fees, supplies, repairs and maintenance, security, and employee relations costs.

ALLOCATED PROGRAM INDIRECT

Allocable programmatic indirect costs.

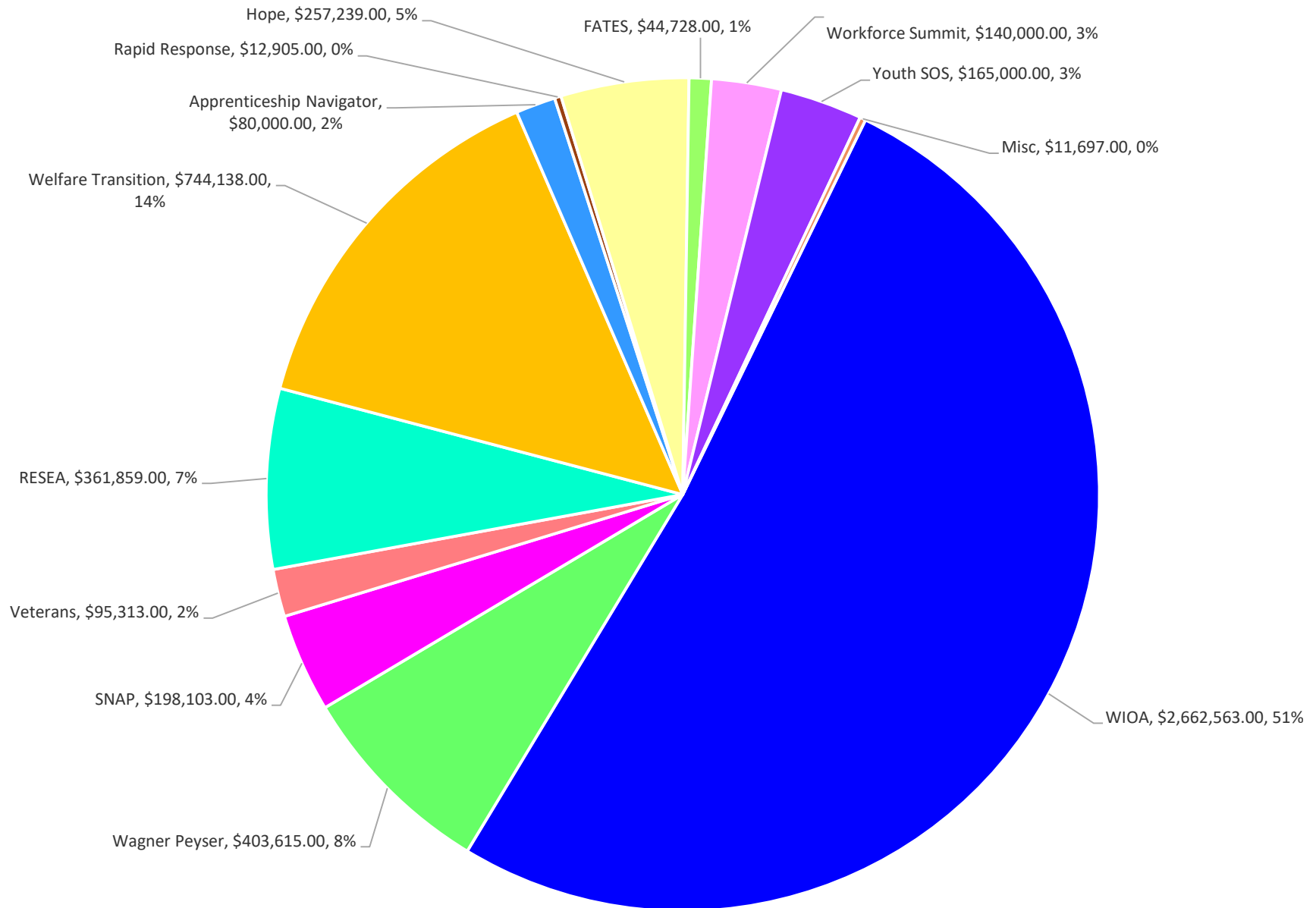
**LWDB 20
PY 25-26 DRAFT Budget**

Budget for PY 25-26	TOTAL LWDB20 FUNDING	INDIRECT	10 ADULT	12 DW	11 YOUTH	17 WIOA Supplemental	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA
Funding:											
PY 25-26 Allocations	\$ 6,091,559		\$ 1,167,001	\$ 667,134	\$ 949,630	\$ -	\$ 804,045	\$ 277,746	\$ 164,070	\$ 150,153	\$ 298,261
PY 25-26 Supplemental	\$ 121,430		\$ -	\$ 121,430	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries	\$ (677,981)		\$ -	\$ -	\$ -	\$ -	\$ (436,517)	\$ -	\$ (122,168)	\$ (119,296)	\$ -
Carryforward to PY 26-27	\$ (2,519,925)		\$ (535,457)	\$ (665,718)	\$ (388,457)	\$ -	\$ (263,913)	\$ (156,143)	\$ -	\$ -	\$ -
Carryforward from PY 24-25	\$ 1,940,652		\$ -	\$ 877,000	\$ 380,000	\$ 90,000	\$ 300,000	\$ 76,500	\$ 6,124	\$ 16,430	\$ 63,598
Total DEO Grant Funding	\$ 4,955,735	\$ -	\$ 631,544	\$ 999,846	\$ 941,173	\$ 90,000	\$ 403,615	\$ 198,103	\$ 48,026	\$ 47,287	\$ 361,859
OTHER NON DEO REVENUES	\$ 221,425										
Total Available Funding	\$ 5,177,159	\$ -	\$ 631,544	\$ 999,846	\$ 941,173	\$ 90,000	\$ 403,615	\$ 198,103	\$ 48,026	\$ 47,287	\$ 361,859
Budgeted Expenditures:											
Administrative	\$ 548,372	\$ 0	\$ 235,656	\$ 13,945	\$ 26,136	\$ -	\$ 10,193	\$ 24,168	\$ 5,266	\$ 4,838	\$ 44,521
Salaries and Benefits	\$ 402,460	\$ 402,460	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 145,912	\$ 145,912	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ 0	\$ (548,372)	\$ 235,656	\$ 13,945	\$ 26,136	\$ -	\$ 10,193	\$ 24,168	\$ 5,266	\$ 4,838	\$ 44,521
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ 4,628,787	\$ 0	\$ 395,888	\$ 985,901	\$ 915,038	\$ 90,000	\$ 393,423	\$ 173,935	\$ 42,760	\$ 42,449	\$ 317,338
WIOA Youth Contracts	\$ 750,000	\$ -	\$ -	\$ -	\$ 750,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 2,188,016	\$ 268,843	\$ 727,889	\$ 66,126	\$ 19,214	\$ -	\$ 27,155	\$ 133,363	\$ 5,443	\$ 6,838	\$ 239,312
Contract Labor	\$ 6,216	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ 14,126	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ 10,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services ITA	\$ 54,517	\$ -	\$ 45,136	\$ 1,881	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ 370,417	\$ -	\$ 311,440	\$ 12,977	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-OJT	\$ 225,478	\$ -	\$ 207,627	\$ 8,651	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ 108,430	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 16,895	\$ -	\$ 3,800	\$ 100	\$ 265	\$ -	\$ 210	\$ 550	\$ 5,300	\$ 3,000	\$ 500
One Stop Shared Costs	\$ 404,809	\$ -	\$ 89,714	\$ 4,270	\$ 78,835	\$ -	\$ 43,463	\$ 13,875	\$ 26,318	\$ 27,130	\$ 35,120
Other Operating Expenses	\$ 479,883	\$ 96,738	\$ 120,177	\$ 5,600	\$ 49,300	\$ -	\$ 15,800	\$ 10,035	\$ 2,188	\$ 2,255	\$ 12,725
Allocated Program Indirect	\$ (0)	\$ (365,581)	\$ 157,104	\$ 9,297	\$ 17,424	\$ -	\$ 6,795	\$ 16,112	\$ 3,511	\$ 3,226	\$ 29,681
Reclassification	\$ -	\$ -	\$ (1,267,000)	\$ 877,000	\$ -	\$ 90,000	\$ 300,000	\$ -	\$ -	\$ -	\$ -
Total Planned Expenditures	\$ 5,177,159	\$ 0	\$ 631,544	\$ 999,846	\$ 941,173	\$ 90,000	\$ 403,615	\$ 198,103	\$ 48,026	\$ 47,287	\$ 361,859
	0	0	0	0	0	0	0	0	0	0	0

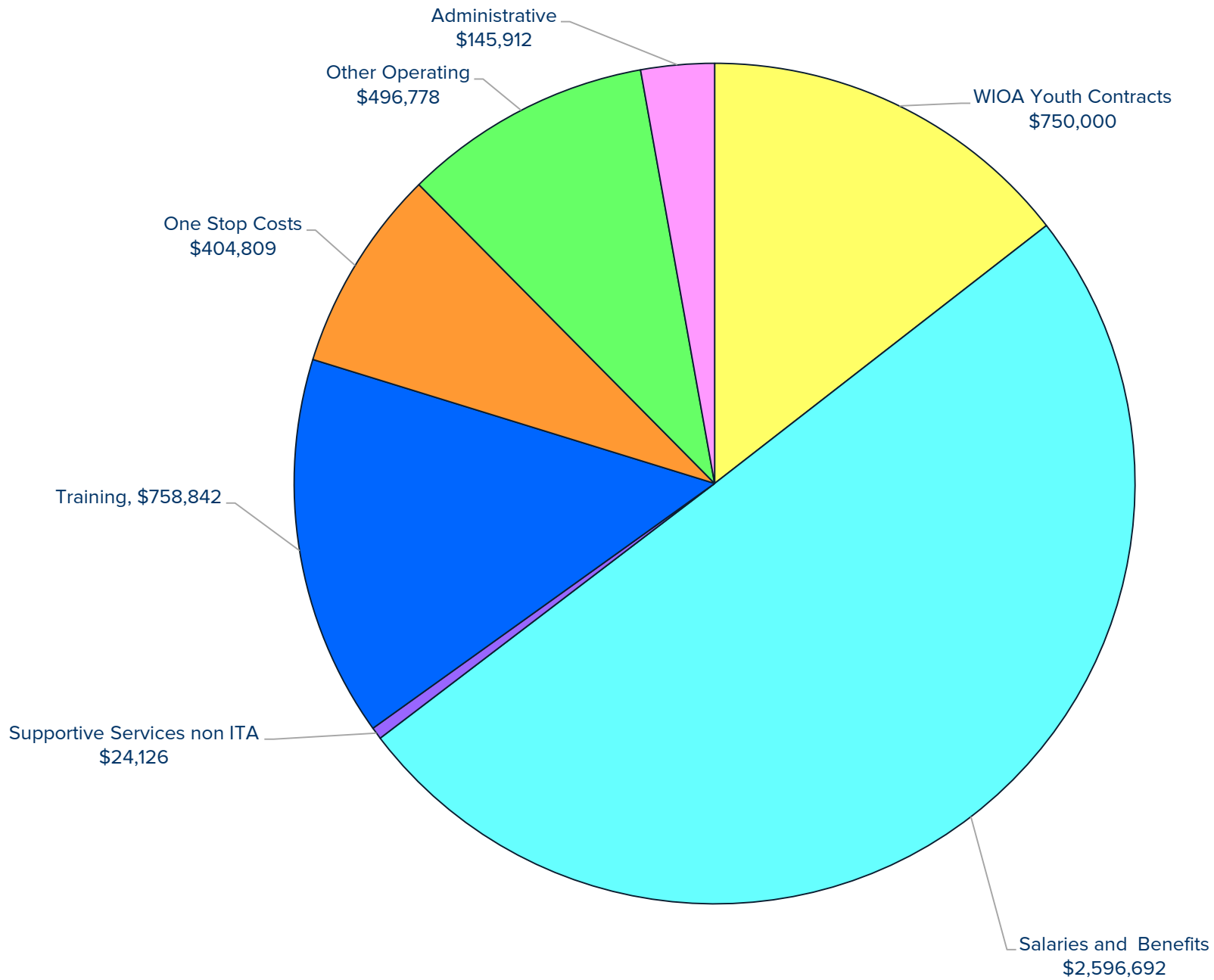
LWDB 20
PY 25-26 DRAFT Budget

Budget for PY 25-26	40 WTP	470 Apprenticeship Navigator	474 Rapid Response Navigator	476 Hope Nav	477 Hope Training	48 F.A.T.E.S.	95 Workforce Summit	792 Youth SOS SLC	Other Non NFA	TOTAL FORMULA FUNDS
Funding:										
PY 25-26 Allocations	\$ 1,043,690	\$ 80,000	\$ 75,000	\$ 54,062	\$ 220,767	\$ -	\$ 140,000	\$ -	\$ -	\$ 6,091,559
PY 25-26 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 121,430
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (677,981)
Carryforward to PY 26-27	\$ (430,552)	\$ -	\$ (62,095)	\$ (17,590)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (2,519,925)
Carryforward from PY 24-25	\$ 131,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,940,652
Total DEO Grant Funding	\$ 744,138	\$ 80,000	\$ 12,905	\$ 36,472	\$ 220,767	\$ -	\$ 140,000	\$ -	\$ -	\$ 4,955,735
OTHER NON DEO REVENUES						\$ 44,728	\$ -	\$ 165,000	\$ 11,697	\$ 221,425
Total Available Funding	\$ 744,138	\$ 80,000	\$ 12,905	\$ 36,472	\$ 220,767	\$ 44,728	\$ 140,000	\$ 165,000	\$ 11,697	\$ 5,177,159
Budgeted Expenditures:										
Administrative	\$ 92,699	\$ 10,098	\$ 1,653	\$ 4,423	\$ 27,867	\$ 5,824	\$ 18,251	\$ 21,401	\$ 1,434	\$ 548,372
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 402,460
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 145,912
Allocated Indirect Costs	\$ 92,699	\$ 10,098	\$ 1,653	\$ 4,423	\$ 27,867	\$ 5,824	\$ 18,251	\$ 21,401	\$ 1,434	\$ (0)
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ 651,439	\$ 69,902	\$ 11,253	\$ 32,049	\$ 192,900	\$ 38,904	\$ 121,749	\$ 143,599	\$ 10,263	\$ 4,628,787
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 750,000
Salaries and Benefits	\$ 454,258	\$ 52,297	\$ 8,431	\$ 23,325	\$ 136,643	\$ 5,396	\$ -	\$ 7,538	\$ 5,945	\$ 2,188,016
Contract Labor	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,216	\$ -	\$ 6,216
Incentives/Stipends	\$ 12,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,126	\$ -	\$ 14,126
Support Services Non-ITA	\$ 10,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 10,000
Support Services ITA	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ 2,500	\$ -	\$ -	\$ -	\$ 54,517
Training-ITA/OST/TAA	\$ 10,000	\$ -	\$ -	\$ -	\$ 10,000	\$ 26,000	\$ -	\$ -	\$ -	\$ 370,417
Training-OJT	\$ -	\$ -	\$ -	\$ -	\$ 9,200	\$ -	\$ -	\$ -	\$ -	\$ 225,478
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 108,430	\$ -	\$ 108,430
Travel	\$ 1,200	\$ 175	\$ 20	\$ 100	\$ 1,500	\$ 40	\$ -	\$ 135	\$ -	\$ 16,895
One Stop Shared Costs	\$ 58,342	\$ 7,423	\$ 1,200	\$ 3,500	\$ 15,050	\$ 560	\$ -	\$ 10	\$ -	\$ 404,809
Other Operating Expenses	\$ 38,840	\$ 3,277	\$ 500	\$ 2,176	\$ 1,928	\$ 526	\$ 109,582	\$ 4,878	\$ 3,362	\$ 479,883
Allocated Program Indirect	\$ 61,799	\$ 6,732	\$ 1,102	\$ 2,949	\$ 18,578	\$ 3,883	\$ 12,167	\$ 14,267	\$ 956	\$ 0
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Planned Expenditures	\$ 744,138	\$ 80,000	\$ 12,905	\$ 36,472	\$ 220,767	\$ 44,728	\$ 140,000	\$ 165,000	\$ 11,697	\$ 5,177,159
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PY 25-26 Budget Funding



PY 25-26 Budget Expenditures by Category



AGENDA ITEM SUMMARY

Title	Jobs for Veterans State Grant (JVSG) - Employment and Advocacy Services Policy Revisions
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	CareerSource Florida Administrative Policy 117 – Employment and Advocacy Services and Veterans Program Letter (VPL) 05-14 -JVSG Staff Roles and Responsibilities and Workforce Innovation and Opportunity Act (WIOA) Services to Veterans
Action Requested	Review and Approve Jobs for Veterans State Grant (JVSG) - Employment and Advocacy Services Policy Revisions
Background	<p>With funding from the United States Department of Labor Veterans Employment and Training Service (DOL VETS), the Florida Department of Commerce (FC) assigns JVSG-funded Disabled Veterans Outreach Program (DVOP) specialists, Local Veterans' Employment Representatives (LVERs), and Consolidated Positions (CP) to Local Workforce Development Boards (LWDBs).</p> <p>Florida's JVSG program prepares veterans, transitioning service members, and eligible persons for meaningful careers. DVOP specialists provide individualized career services to eligible veterans and persons experiencing qualifying employment barriers (QEBs), with an emphasis on assisting veterans who are economically or educationally disadvantaged. LVER staff conduct outreach to employers and business associations to engage in advocacy efforts with hiring executives to develop employment opportunities for veterans and encourage the hiring of veterans.</p> <p>To align with the new VPL 05-14, staff revised the JVSG Employment and Advocacy Services Policy as follows:</p> <ul style="list-style-type: none"> • Significant Barriers to Employment are now Qualifying Employment Barriers • DVOPs may not serve individuals who have not been screened for eligibility and registered in Employ Florida. • An additional primary service offered by the DVOP was added, i.e., Post-Employment Consistent Contact. • Two additional services were added for the LVERs, i.e., Job Development Attempts and Work Readiness Case Conference, which previously was completed by the DVOP.
Staff Recommendations	Review and Approve Jobs for Veterans State Grant (JVSG) - Employment and Advocacy Services Policy Revisions
Supporting Material	Jobs for Veterans State Grant (JVSG) - Employment and Advocacy Services Policy Revisions
Board Staff	<p>Tracey McMorris Vice President of Operations/COO tmcmorris@careersourcerc.com (866) 482-4473 ext. 528</p>



JOBS FOR VETERANS STATE GRANT (JVSG)
EMPLOYMENT AND ADVOCACY SERVICES POLICY
ORIGINAL APPROVAL DATE: 12/22/2021
REVISION DATE: 5/21/2025N/A
BOARD EFFECTIVE DATE: 5/28/202512/22/2021

PURPOSE

The purpose of this policy is to establish CareerSource Research Coast's (CSRC) minimum requirements for Disabled Veterans Outreach Program (DVOP) Specialists and Local Veteran Employment Representatives (LVER) in providing employment and advocacy services to Jobs for Veteran State Grant (JVSG) participants.

REFERENCES

CareerSource Florida Administrative Policy 117 - Employment and Advocacy Services and Veterans Program Letter 05-14 JVSG Staff Roles and Responsibilities and WIOA Services to Veterans.

BACKGROUND

With funding from the United States Department of Labor Veterans Employment and Training Service (DOL VETS), the Florida Department of Economic Opportunity (DEO) Commerce (FC) assigns JVSG-funded Disabled Veterans Outreach Program (DVOP) specialists, Local Veterans' Employment Representatives (LVERs), and Consolidated Positions (CP) to Local Workforce Development Boards (LWDBs).

Florida's JVSG program prepares veterans, transitioning service members, and eligible persons spouses for meaningful careers. DVOP specialists provide individualized career services to eligible veterans and persons experiencing qualifying employment barriers (QEBs) significant barriers to employment, with an emphasis on assisting veterans who are economically or educationally disadvantaged. LVER staff conduct outreach to employers and business associations to engage in advocacy efforts with hiring executives to develop employment opportunities for veterans and encourage the hiring of veterans.

LOCAL POLICY

Upon determination of a jobseeker's eligibility as outlined in the CareerSource Florida Administrative Policy 102 Veteran Intake at Career Centers, DVOP specialists and LVER staff must facilitate employment services to eligible persons as described in this policy.

A. Disabled Veteran Outreach Program Specialists

DVOP specialists facilitate individualized career services to eligible persons through the case management framework. The purpose of individualized career services is to provide eligible veterans and spouses the necessary information and customized support for obtaining sustained employment. Case management assists participants by evaluating the individual's service level needs, establishing an employment plan, delivering services, and providing consistent contact through a proactive and structured framework. DVOP specialists must emphasize a customer-focused approach, which recognizes that the eligible persons they serve are individuals who may require services that are tailored to their specific needs, situations, and goals.

Services provided to eligible individuals must be recorded in the State's online labor exchange and case management system, Employ Florida (EF). DVOP specialists may not serve individuals who have not been screened for eligibility and registered in EF must facilitate the creation, or update, of the eligible person's Employ Florida individual registration and Wagner-Peyser Program Application. Frontline staff are responsible for eligibility screening and ensuring the EF registration is complete to include recording activity codes reflecting the screening and explanation of Priority of Service.

Veterans who are participating in the United States Department of Veterans Affairs' Veteran Readiness and Employment (VR&E) Chapter 31 Program and/or the United States Department of Labor's Homeless Veteran Reintegration Program (HVRP) must be recorded as such in the Veteran page of the Wagner-Peyser Program Application.

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.

JVSG - Employment and Advocacy Services Policy - May 2025 with tracked changes JVSG - Employment and Advocacy Services Policy - December 2021 May 2025

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JOB FOR VETERANS STATE GRANT (JVSG)
EMPLOYMENT AND ADVOCACY SERVICES POLICY
ORIGINAL APPROVAL DATE: 12/22/2021
REVISION DATE: [5/21/2025](#)~~N/A~~
BOARD EFFECTIVE DATE: [5/28/2025](#)~~12/22/2021~~

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.

[JVSG - Employment and Advocacy Services Policy - May 2025 with tracked changes](#)~~JVSG - Employment and Advocacy Services Policy - December 2021~~
[May 2025](#)
Page 2 of 4



JOBS FOR VETERANS STATE GRANT (JVSG)
EMPLOYMENT AND ADVOCACY SERVICES POLICY
ORIGINAL APPROVAL DATE: 12/22/2021
REVISION DATE: ~~5/21/2025~~
BOARD EFFECTIVE DATE: ~~5/28/2025~~

DVOP specialists must enroll eligible persons into the JVSG sub-program by entering a JVSG eligibility date on the Intro page of the Wagner-Peyser Program Application. Once the eligible person's Employ Florida individual registration and Wagner-Peyser Program Application has been created, DVOP specialists must document employment services in the participant's Employ Florida Wagner-Peyser Program Application by recording the service code which corresponds to the service provided in accordance with the Employ Florida Service Code Guide. All services recorded by the DVOP must be recorded under the JVSG customer group in the veteran or eligible person's Wagner-Peyser Service Plan. The Objective Assessment must be the initial service provided to the eligible person to initiate JVSG participation. Additional services may be provided, but the primary services to be administered by DVOP specialists are outlined below.

- 1. Objective Assessment
- 2. Specialized Assessments
- 3. Individual Career Counseling
- 4. Individual Employment Plan
- 5. Short-Term Prevocational Services
- 6. Coordination of Wraparound Services
- 7. Work Experience
- 8. Workforce Preparation Activities
- 9. Consistent Contact
- 10. Outreach Engagement
- Work Readiness Case Conference
- 11. Job Referrals
- 12. Staff-Assisted Job Search Activities
- 13. Post-Employment Consistent Contact

—During the case management process, it may be determined by the DVOP Specialist and JVSG participant that they would benefit from work-based learning and/or training to practice or enhance their current skills and knowledge. If this is determined, the DVOP Specialist will refer the JVSG participant to the Workforce Innovation and Opportunity Act (WIOA) program and record service code 211 (Referral to WIOA).

In the event a DVOP specialist vacates their position or is dismissed, their assigned JVSG participants will be reassigned within two business days to another DVOP by the JVSG Program Manager or designee. If there is no other DVOP, the assigned JVSG participants will be reassigned within two business days to career planners in an equitable manner based on the residence location of the JVSG participant. Reassignments will be facilitated by the JVSG Program Manager or designee.

B. Local Veterans' Employment Representative

B.

LVERs conduct employer outreach activities as part of CSRC's Business Services Unit that support job developments and job referrals for veterans. To serve veterans and eligible persons effectively and efficiently, LVERs must focus on their primary role, which is employer outreach on behalf of veterans. In executing this role, LVER staff must concentrate efforts on advocacy services for veterans jointly determined to be work ready after receiving individualized career services from a DVOP specialist. These activities must include efforts to increase job opportunities for veterans and eligible persons through direct employer contact.

LVER staff must document advocacy efforts in the employer's Employ Florida Service Record and/or the participant's Employ Florida Wagner-Peyser Program Application by recording the service code which

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.

~~JVSG - Employment and Advocacy Services Policy - May 2025 with tracked changes~~ ~~JVSG - Employment and Advocacy Services Policy - December~~

~~2021~~ May 2025

Page 3 of 4

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JOBS FOR VETERANS STATE GRANT (JVSG)
EMPLOYMENT AND ADVOCACY SERVICES POLICY
ORIGINAL APPROVAL DATE: 12/22/2021
REVISION DATE: ~~5/21/2025~~
BOARD EFFECTIVE DATE: ~~5/28/2025~~

corresponds to the service provided in accordance with the Employ Florida Service Code Guide.

The primary services provided by the LVER are outlined below.

- 1. Job Development (employer and eligible person)
- 2. Referrals to Job Orders, resulting from Job Developments
- 3. Job Development Attempts (eligible person and employer, if registered in EF)
- 4. Veteran Advocacy Contact (employer and eligible person)
- 5. Work-Readiness Case Conference

C. Career Center Staff

Career center staff must be prepared to serve veterans and eligible persons when a DVOP specialist is unavailable. At minimum, the veteran or eligible person must be provided with the services requested by the appropriate staff member. Additionally, career center staff must refer the eligible person to the DVOP specialist within two business days so that they may provide a follow-up contact to determine if any additional services are desired. The DVOP specialist who receives the referral must attempt to contact the eligible veteran or person within two business days of receipt of the referral.

Refer to the Following:

Employ Florida Service Code Guide

[Veterans Program Letter 05-14 JVSG Staff Roles and Responsibilities and WIOA Services to Veterans](#)

[CareerSource Florida Administrative Policy 117 - Employment and Advocacy Services](#)

CareerSource Florida Administrative Policy 102 - Veteran Intake at Career Centers

[CSRC JVSG - Employment and Advocacy Services Procedures](#)

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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.

[JVSG - Employment and Advocacy Services Policy - May 2025 with tracked changes](#)
~~JVSG - Employment and Advocacy Services Policy - December 2021~~

PURPOSE

The purpose of this policy is to establish CareerSource Research Coast's (CSRC) minimum requirements for Disabled Veterans Outreach Program (DVOP) Specialists and Local Veteran Employment Representatives (LVER) in providing employment and advocacy services to Jobs for Veteran State Grant (JVSG) participants.

REFERENCES

CareerSource Florida Administrative Policy 117 - Employment and Advocacy Services and Veterans Program Letter 05-14 JVSG Staff Roles and Responsibilities and WIOA Services to Veterans.

BACKGROUND

With funding from the United States Department of Labor Veterans Employment and Training Service (DOL VETS), the Florida Department of Commerce (FC) assigns JVSG-funded Disabled Veterans Outreach Program (DVOP) specialists, Local Veterans' Employment Representatives (LVERs), and Consolidated Positions (CP) to Local Workforce Development Boards (LWDBs).

Florida's JVSG program prepares veterans, transitioning service members, and eligible persons for meaningful careers. DVOP specialists provide individualized career services to eligible veterans and persons experiencing qualifying employment barriers (QEBs), with an emphasis on assisting veterans who are economically or educationally disadvantaged. LVER staff conduct outreach to employers and business associations to engage in advocacy efforts with hiring executives to develop employment opportunities for veterans and encourage the hiring of veterans.

LOCAL POLICY

Upon determination of a jobseeker's eligibility as outlined in the CareerSource Florida Administrative Policy 102 Veteran Intake at Career Centers, DVOP specialists and LVER staff must facilitate employment services to eligible persons as described in this policy.

A. Disabled Veteran Outreach Program Specialists

DVOP specialists facilitate individualized career services to eligible persons through the case management framework. The purpose of individualized career services is to provide eligible veterans and spouses the necessary information and customized support for obtaining sustained employment. Case management assists participants by evaluating the individual's service level needs, establishing an employment plan, delivering services, and providing consistent contact through a proactive and structured framework. DVOP specialists must emphasize a customer-focused approach, which recognizes that the eligible persons they serve are individuals who may require services that are tailored to their specific needs, situations, and goals.

Services provided to eligible individuals must be recorded in the State's online labor exchange and case management system, Employ Florida (EF). DVOP specialists may not serve individuals who have not been screened for eligibility and registered in EF. Frontline staff are responsible for eligibility screening and ensuring the EF registration is complete to include recording activity codes reflecting the screening and explanation of Priority of Service.

Veterans who are participating in the United States Department of Veterans Affairs' Veteran Readiness and Employment (VR&E) Chapter 31 Program and/or the United States Department of Labor's Homeless Veteran Reintegration Program (HVRP) must be recorded as such in the Veteran page of the Wagner-Peyser Program Application.

DVOP specialists must enroll eligible persons into the JVSG sub-program by entering a JVSG eligibility date on the Intro page of the Wagner-Peyser Program Application. Once the eligible person's Employ Florida individual registration and Wagner-Peyser Program Application has been created, DVOP specialists must document employment services in the participant's Employ Florida Wagner-Peyser Program Application by recording the service code which corresponds to the service provided in accordance with the Employ Florida Service Code Guide. All services recorded by the DVOP must be recorded under the JVSG customer group in the veteran or eligible person's Wagner-Peyser Service Plan. The Objective Assessment must be the initial service provided to the eligible person to initiate JVSG participation. Additional services may be provided, but the primary services to be administered by DVOP specialists are outlined below.

1. Objective Assessment
2. Specialized Assessments
3. Individual Career Counseling
4. Individual Employment Plan
5. Short-Term Prevocational Services
6. Coordination of Wraparound Services
7. Work Experience
8. Workforce Preparation Activities
9. Consistent Contact
10. Outreach Engagement
11. Job Referrals
12. Staff-Assisted Job Search Activities
13. Post-Employment Consistent Contact

During the case management process, it may be determined by the DVOP Specialist and JVSG participant that they would benefit from work-based learning and/or training to practice or enhance their current skills and knowledge. If this is determined, the DVOP Specialist will refer the JVSG participant to the Workforce Innovation and Opportunity Act (WIOA) program and record service code 211 (Referral to WIOA).

In the event a DVOP specialist vacates their position or is dismissed, their assigned JVSG participants will be reassigned within two business days to another DVOP by the JVSG Program Manager or designee. If there is no other DVOP, the assigned JVSG participants will be reassigned within two business days to career planners in an equitable manner based on the residence location of the JVSG participant. Reassignments will be facilitated by the JVSG Program Manager or designee.

B. Local Veterans' Employment Representative

LVERs conduct employer outreach activities as part of CSRC's Business Services Unit that support job developments and job referrals for veterans. To serve veterans and eligible persons effectively and efficiently, LVERs must focus on their primary role, which is employer outreach on behalf of veterans. In executing this role, LVER staff must concentrate efforts on advocacy services for veterans jointly determined to be work ready after receiving individualized career services from a DVOP specialist. These activities must include efforts to increase job opportunities for veterans and eligible persons through direct employer contact.

LVER staff must document advocacy efforts in the employer's Employ Florida Service Record and/or the participant's Employ Florida Wagner-Peyser Program Application by recording the service code which corresponds to the service provided in accordance with the Employ Florida Service Code Guide.

The primary services provided by the LVER are outlined below.

1. Job Development (employer and eligible person)
2. Referrals to Job Orders, resulting from Job Developments
3. Job Development Attempts (eligible person and employer, if registered in EF)
4. Veteran Advocacy Contact (employer and eligible person)
5. Work-Readiness Case Conference

C. Career Center Staff

Career center staff must be prepared to serve veterans and eligible persons when a DVOP specialist is unavailable. At minimum, the veteran or eligible person must be provided with the services requested by the appropriate staff member. Additionally, career center staff must refer the eligible person to the DVOP specialist within two business days so that they may provide a follow-up contact to determine if any additional services are desired. The DVOP specialist who receives the referral must attempt to contact the eligible veteran or person within two business days of receipt of the referral.

Refer to the Following:

Employ Florida Service Code Guide

Veterans Program Letter 05-14 JVSG Staff Roles and Responsibilities and WIOA Services to Veterans

CareerSource Florida Administrative Policy 117 - Employment and Advocacy Services

CareerSource Florida Administrative Policy 102 - Veteran Intake at Career Centers

CSRC JVSG - Employment and Advocacy Services Procedures

AGENDA ITEM SUMMARY

Title	Workforce Innovation and Opportunity Act (WIOA) - Individual Training (ITA) Account Policy Revisions
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Workforce Innovation and Opportunity Act of 2014 (WIOA), Sec. 134(c)(3) (G)(ii)
Action Requested	Review and Approve WIOA - Individual Training Account (ITA) Policy Revisions
Background	<p>The Workforce Innovation and Opportunity Act (WIOA) requires that individuals be provided an Individual Training Account (ITA) to pay for tuition, books, and fees related to occupational skills training accessed through an approved training provider. CareerSource Florida requires that local boards establish policies related to the value of the ITA, cancellation, transferability, and limits that apply to these accounts.</p> <p>Staff have revised the policy to include:</p> <ul style="list-style-type: none"> • Identifying specifically the type of assessment CSRC will utilize to target services to the individual needs of the career seeker. • Raising the entry wage for training programs based on the increased minimum wage as well as the scale to be considered high skill/high wage as outlined on the Local Targeted Occupations List. • Adding the Regional Planning Area to CSRC's service delivery area. • Reducing the maximum ITA investment scale to allow more individuals to be served.
Staff Recommendations	Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Individual Training Account (ITA) Policy Revisions
Supporting Material	WIOA - Individual Training Account (ITA) Policy Revisions
Board Staff	<p>Tracey McMorris Vice President of Operations/COO tmcmorris@careersourcerc.com (866) 482-4473 ext. 528</p>

PURPOSE

To provide guidance on the use of Workforce Innovation and Opportunity Act (WIOA) Individual Training Accounts (ITA) for eligible and suitable career seekers determined in need of training. WIOA training services are provided to assist a career seeker in obtaining self-sufficient employment in their field of training. This policy establishes guidelines to promote successful training completion, certification/credential attainment, and gainful employment.

REFERENCE

The Workforce Innovation and Opportunity Act of 2014 (WIOA), Sec.134(c)(3)(G)(ii), specifies that, with certain limited exemptions, all Title I Adult and Dislocated Worker training services shall be provided using Individual Training Accounts (ITAs).

BACKGROUND

The Workforce Innovation and Opportunity Act promotes career seeker choice and designates ITAs for that purpose. Career seekers determined eligible and suitable are issued an ITA for training programs in alignment with occupations identified on the Local Targeted Occupations List (LTOL) and included on the approved Eligible Training Provider List (ETPL). WIOA Section 134 states that training services may include a program of one or more classes or courses, or a structured regimen, that upon successful completion leads to a certification/credential, an associate of science degree, a baccalaureate degree, completion of a registered apprenticeship program, or the skills or competencies needed for a specific job or jobs, an occupation, an occupational group, or generally, for many types of jobs or occupations, as recognized by employers and determined prior to training.

Under WIOA, training services may be provided if CareerSource Research Coast (CSRC) staff determine, after an interview, evaluation, assessment, and career planning, that the individual:

- Is unlikely or unable to obtain or retain employment, that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services alone.
- Needs training services to obtain or retain employment that leads to self-sufficiency or wages comparable to or higher than wages from previous employment; and
- Has the skills and qualifications to successfully participate in the selected program of training service.

WIOA requires that individuals be provided an ITA to pay for tuition, books, and fees related to occupational skills training accessed through an approved training provider. Local boards must establish policies related to the value of the ITA, cancellation, transferability, and limits that apply to these accounts.

POLICY

CSRC has developed its ITA system to encourage and promote career pathways that lead to self-sufficiency. [An Objective Assessment](#) is mandatory to target services to the individual needs of the career seeker who is unable to find suitable employment with existing skills and/or academic credentials as evidenced through documented unsuccessful job search and placement. An Individual Employment Plan (IEP) must be developed by the Career Planner and participant detailing the role of the training (ITA) in preparing the participant for employment in a demand occupation included on the LTOL. The plan must be signed prior to the issuance of the ITA.

Priority will be given to ITAs for occupations in the industry sectors identified by CSRC for targeted sector strategy initiatives as reflected in the current CSRC WIOA Local Plan.

An ITA tier system will be utilized to determine the maximum allowable amount of the ITA. All ITAs will be categorized using the average entry wage of the selected training program. The thresholds for allowable ITA investment will be categorized in the following tiers*:

TIER	ENTRY WAGE FOR LWDA	MAXIMUM ITA INVESTMENT
Tier 1	\$13.00 15.00 Minimum wage* to \$15.00 17.26 per hour	Up to \$ 7,510,000 **
Tier 2	\$15.01 17.27 per hour	Up to \$105,000**
Tier 3	Related Instruction for Registered Apprenticeship	**See Below

*ITAs may be awarded at the Tier 1 amount for those occupations whose entry wage is not at the designated level when the training program provides a career pathway for an occupation designated in the LWDA's industry sectors. The training must be included on the ~~CSRC~~ ETPL.

**Funding that exceeds the maximum ITA investment may be recommended ~~by the ITA Committee~~ on a case-by-case basis for clients with significant barriers to employment, with approval granted by the President/CEO.

To be eligible for an ITA, the following criteria must be met:

1. The career seeker must not have received an ITA in the past 24 months.
2. The career seeker must be a resident of the CSRC service delivery ~~or Palm Beach-Treasure Coast Regional Planning Area~~ to receive an ITA. An exception may be made to award an ITA to eligible and suitable career seekers who are residents of other CareerSource LWDA's when each of the following conditions are met:
 - a. The purpose of the ITA is for specialized sector training as specified by WIOA funding awarded through grants and/or specialized projects.
 - b. A partnership with the Local Workforce Development Board governing the LWDA in which the career seeker resides has been established and documented.
3. The career seeker has been determined through formal assessment(s), interviews, and career planning, to be an appropriate match and possess the aptitude to complete the selected training program, obtain the appropriate certification/credential, and be eligible for hire in training related employment.
4. As part of the suitability determination process, career seekers must demonstrate the ability to self-sustain financially for the length of the training until employment is gained and be able to cover the training amount above CSRC funds.
5. The selected training program and training provider is listed on the ETPL and is within the LWDA's commuting area.
6. The career seeker must select an eligible training program offered by an eligible training provider, which upon completion of training, leads to an industry-recognized certification, credential, or degree.
7. On an annual basis, or in the case of scholarships, as they become available, the career seeker must apply for other training assistance (for example: Pell Grant, scholarships, and employer-sponsored training) to help assist with the cost of training and training related support. Any scholarships or grants received will be applied toward the total allowable tuition, books, and fees prior to determining the ITA amount.

The career seeker will only receive one (1) ITA to complete the training program for which they are deemed suitable and eligible. If the career seeker has completed such a program and is requesting additional funding to upgrade their program and continue on a career pathway, additional funding may be awarded, provided it is not for a graduate degree. Note: Individuals who have degrees in current demand occupations, are employed full-time, and have years of experience in their field are not appropriate for consideration of additional training. Consideration will be given to individuals who have outdated credentials and/or credentials in occupations not considered high wage/high skills as referenced on the LTOL and are determined under-employed. Career seekers who meet one of the following conditions are considered under-employed:

- Individuals employed less than full-time who are seeking full-time employment.
 - Individuals who are employed in a position that is inadequate with respect to their skills and training.
 - Individuals who are employed who meet the definition of low-income individual.
 - Individuals who are employed, but whose current job's earnings are not sufficient compared to their previous job's earnings from their employment, per state and/or local policy.
8. The duration of the ITA will be determined on a case-by-case basis by reviewing the maximum allowable amount of the ITA, the duration of the program, and the prevailing costs of tuition, books, and fees along with the career seeker's receipt of financial aid. The Career Planner and the career seeker must develop a documented educational plan that ensures completion of the training program within the allotted timeframe. CSRC reserves the right to limit the number of semesters/terms and the amount of funding provided based on length of training, cost of training programs, and availability of funds.
 9. Payments to training providers made on behalf of ITA participants will be on an individual class or per-semester basis. Participants must provide documentation of successful completion of prior semester/term coursework before a subsequent payment may be made.
 10. Career seekers must demonstrate satisfactory progress throughout the duration of the training to continue receiving WIOA funding. Satisfactory progress for the purpose of this policy is defined as maintaining a "C" average for each approved class on an official transcript or grade report. If the career seeker does not perform as expected, the ITA may be withdrawn until such time the grade level in each class returns to a "C" (2.0) and documentation provided to the Career Planner.

All ITAs are subject to the availability of funds and issued for the current program year only. CSRC cannot provide a guarantee of continued funding as funds used to provide training are based on federal/state dollars' availability.

The use of ITAs for occupational skills training is subject to the Priority of Service procedures defined by WIOA.

ITAs are not transferable.

PURPOSE

To provide guidance on the use of Workforce Innovation and Opportunity Act (WIOA) Individual Training Accounts (ITA) for eligible and suitable career seekers determined in need of training. WIOA training services are provided to assist a career seeker in obtaining self-sufficient employment in their field of training. This policy establishes guidelines to promote successful training completion, certification/credential attainment, and gainful employment.

REFERENCE

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BACKGROUND

The Workforce Innovation and Opportunity Act promotes career seeker choice and designates ITAs for that purpose. Career seekers determined eligible and suitable are issued an ITA for training programs in alignment with occupations identified on the Local Targeted Occupations List (LTOL) and included on the approved Eligible Training Provider List (ETPL). WIOA Section 134 states that training services may include a program of one or more classes or courses, or a structured regimen, that upon successful completion leads to a certification/credential, an associate of science degree, a baccalaureate degree, completion of a registered apprenticeship program, or the skills or competencies needed for a specific job or jobs, an occupation, an occupational group, or generally, for many types of jobs or occupations, as recognized by employers and determined prior to training.

Under WIOA, training services may be provided if CareerSource Research Coast (CSRC) staff determine, after an interview, evaluation, assessment, and career planning, that the individual:

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WIOA requires that individuals be provided an ITA to pay for tuition, books, and fees related to occupational skills training accessed through an approved training provider. Local boards must establish policies related to the value of the ITA, cancellation, transferability, and limits that apply to these accounts.

POLICY

CSRC has developed its ITA system to encourage and promote career pathways that lead to self-sufficiency. An Objective Assessment is mandatory to target services to the individual needs of the career seeker who is unable to find suitable employment with existing skills and/or academic credentials as evidenced through documented unsuccessful job search and placement. An Individual Employment Plan (IEP) must be developed by the Career Planner and participant detailing the role of the training (ITA) in preparing the participant for employment in a demand occupation included on the LTOL. The plan must be signed prior to the issuance of the ITA.

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Tier 2	\$17.27 per hour	Up to \$10,000**
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 - b. A partnership with the Local Workforce Development Board governing the LWDA in which the career seeker resides has been established and documented.
3. The career seeker has been determined through formal assessment(s), interviews, and career planning, to be an appropriate match and possess the aptitude to complete the selected training program, obtain the appropriate certification/credential, and be eligible for hire in training related employment.
4. As part of the suitability determination process, career seekers must demonstrate the ability to self-sustain financially for the length of the training until employment is gained and be able to cover the training amount above CSRC funds.
5. The selected training program and training provider is listed on the ETPL and is within the LWDA's commuting area.
6. The career seeker must select an eligible training program offered by an eligible training provider, which upon completion of training, leads to an industry-recognized certification, credential, or degree.
7. On an annual basis, or in the case of scholarships, as they become available, the career seeker must apply for other training assistance (for example: Pell Grant, scholarships, and employer-sponsored training) to help assist with the cost of training and training related support. Any scholarships or grants received will be applied toward the total allowable tuition, books, and fees prior to determining the ITA amount.

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- Individuals employed less than full-time who are seeking full-time employment.
 - Individuals who are employed in a position that is inadequate with respect to their skills and training.
 - Individuals who are employed who meet the definition of low-income individual.
 - Individuals who are employed, but whose current job's earnings are not sufficient compared to their previous job's earnings from their employment, per state and/or local policy.
8. The duration of the ITA will be determined on a case-by-case basis by reviewing the maximum allowable amount of the ITA, the duration of the program, and the prevailing costs of tuition, books, and fees along with the career seeker's receipt of financial aid. The Career Planner and the career seeker must develop a documented educational plan that ensures completion of the training program within the allotted timeframe. CSRC reserves the right to limit the number of semesters/terms and the amount of funding provided based on length of training, cost of training programs, and availability of funds.
9. Payments to training providers made on behalf of ITA participants will be on an individual class or per-semester basis. Participants must provide documentation of successful completion of prior semester/term coursework before a subsequent payment may be made.
10. Career seekers must demonstrate satisfactory progress throughout the duration of the training to continue receiving WIOA funding. Satisfactory progress for the purpose of this policy is defined as maintaining a "C" average for each approved class on an official transcript or grade report. If the career seeker does not perform as expected, the ITA may be withdrawn until such time the grade level in each class returns to a "C" (2.0) and documentation provided to the Career Planner.

All ITAs are subject to the availability of funds and issued for the current program year only. CSRC cannot provide a guarantee of continued funding as funds used to provide training are based on federal/state dollars' availability.

The use of ITAs for occupational skills training is subject to the Priority of Service procedures defined by WIOA.

ITAs are not transferable.

AGENDA ITEM SUMMARY

Title	Workforce Innovation and Opportunity Act (WIOA) - On-the-Job Training (OJT) Program Policy Revisions
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/ CareerSource Florida Policy 100/Board Policy Public Law 113-128, Workforce Innovation and Opportunity Act, 20 CFR 680.700 - 680.840, 20 CFR 683.400, 20 CFR 683.410, Training and Employment Guidance Letter (TEGL) 19-16, 2 CFR Appendix II to Part 200, Contract Provisions for Non-Federal Entity Contracts Under Federal Awards, Chapter 445, Florida Statutes, CareerSource Florida Strategic Policy 2021.12.09.A.1 – Comprehensive Employment Education and Training Strategy, CareerSource Florida Workforce Policy – Work-Based Training and Work-Based Learning Opportunities and CareerSource Florida Policy 009 – On-the-Job Training
Action Requested	Review and Approve the Workforce Innovation and Opportunity Act (WIOA) - On-the-Job Training (OJT) Program Policy Revisions
Background	<p>OJT helps employers cover the costs of training new employees. and allows participants to earn while they learn, acquire new skills, and enhance their financial independence. OJT is uniquely suited to help individuals facing employment barriers to gain a foothold in the workforce. Individuals must meet WIOA eligibility criteria to participate in OJT programs.</p> <p>CareerSource Research Coast (CSRC) updated the local On-the-Job (OJT) policy language to reflect changes in CareerSource Florida Workforce Policy 009, On-the-Job Training. Changes included an expansion of participant eligibility for OJT, additional information regarding employer and occupation eligibility and the requirement of an in-person worksite monitoring visit during the participant's OJT participation.</p>
Staff Recommendations	Review and approve the WIOA - On-the-Job Training (OJT) Policy Revisions
Supporting Material	WIOA - On-the-Job Training (OJT) Policy Revisions
Board Staff	<p>Tracey Mcmorris Vice President of Operations/COO tmcmorris@careersourcerc.com (866) 482-4473 ext. 528</p>



UNIVERSAL POLICY/WORKFORCE INNOVATION & OPPORTUNITY ACT (WIOA)

ON-THE-JOB-TRAINING PROGRAM POLICY

ORIGINAL APPROVAL DATE: 8/15/2007

REVISION DATE: 02/27/20235/21/2025

BOARD EFFECTIVE DATE: 03/01/202305/28/2025

PURPOSE

To outline the requirements for and provide guidance for implementing On-the-Job Training (OJT).

REFERENCES

Public Law 113-128, Workforce Innovation and Opportunity Act, 20 CFR 680.700 - 680.840, 20 CFR 683.400, 20 CFR 683.410, Training and Employment Guidance Letter (TEGL) 19-16, 2 CFR Appendix II to Part 200, Contract Provisions for Non-Federal Entity Contracts Under Federal Awards, Chapter 445, Florida Statutes, CareerSource Florida Strategic Policy 2021.12.09.A.1 – Comprehensive Employment Education and Training Strategy, CareerSource Florida Workforce Policy – Work-Based Training and Work-Based Learning Opportunities, The Workforce Innovation & Opportunity Act of 2014, (WIOA), Sec. 134(c)(3)(D)(iii) and CareerSource Florida Policy 009 – On-the-Job Training, CareerSource Florida Policy 100- Work-Based Training.

BACKGROUND:

Among the various training programs available through WIOA for eligible participants, OJT helps employers cover the costs of training new employees. OJT allows participants to earn while they learn, acquire transferable skills, and enhance their financial independence. OJT is uniquely suited to help individuals facing employment barriers to gain a foothold in the workforce. Individuals must meet WIOA eligibility criteria to participate in OJT programs.

Co-enrolling WIOA participants in multiple programs, including OJT, provides comprehensive support by using resources from different programs to meet the needs of job seekers. This approach allows participants to receive job training and educational services at the same time, improving employment outcomes and offering a more complete set of services tailored to their needs.

POLICY:

On-the-Job Training (OJT) is paid subsidized job skills training that is provided by an employer during the initial term of employment. OJT is designed to ensure the participant acquires the employer-specific job skills necessary to secure and maintain employment and provides knowledge or skills essential to the full and adequate performance of the job. The training is limited in duration as appropriate to the occupation for which the participant is being trained and is not to exceed six (6) months. The employer is typically reimbursed 50% of the participant's wages during the OJT period. may be reimbursed up to seventy five (75) percent of the participant's wages during the OJT period. This reimbursement is designed to offset the employer's costs for providing the job training and any necessary additional supervision.

WIOA, WIOA, Sec 3 (44) and Sec 134(c)(3)(H) authorizes CSRC flexibility under WIOA to increase the reimbursement level up to 75 percent. CSRC's policy allows for 50 percent reimbursement and permits the Vice President of Operations/COO, with approval of the President/CEO, to increase the reimbursement level up to 75 percent in specific situations. Please refer to section VI.A Payments to Employers, Wages and Participant Hours for details, taking into consideration the following factors which must be presented at the time of request for approval, and subsequently documented in the OJT Training Plan:

- The characteristics of the participants (e.g. length of unemployment, current skill level, and barriers to employment)
- The size of the employer, with an emphasis on small businesses (e.g. small and medium-sized business often have more barriers to participation at lower reimbursement rates)
- The quality of employer-provided training and advancement opportunities (e.g. registered apprenticeships, when the OJT contract is for an in-demand occupation and will lead to an industry-

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 - OJT Program Policy - May 2025 5.12.25 With Changes WIOA - OJT Program Policy - May 2025

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UNIVERSAL POLICY/WORKFORCE INNOVATION & OPPORTUNITY ACT (WIOA)

ON-THE-JOB-TRAINING PROGRAM POLICY

ORIGINAL APPROVAL DATE: 8/15/2007

REVISION DATE: 02/27/2023 5/21/2025

BOARD EFFECTIVE DATE: 03/01/2023 05/28/2025

recognized credential).

Other factors the Governor or CSRC may determine appropriate (e.g. the number of employees participating in the training, wage and benefit levels of the employees [both pre and post participation earnings], and relation of the training to the competitiveness of the participant)

A. The duration of the OJT is based on the Specific Vocational Preparation code in alignment with the O*Net Job Zone categories. Job Zone categories are listed in the table below:

The Five Job Zones Are:	Training Hours
Job Zone 1—occupations that need little or no preparation	0–240
Job Zone 2—occupations that need some preparation	241–640
Job Zone 3—occupations that need medium preparation	641–800
Job Zone 4/5—occupations that need extensive preparation	801–960

B.1. WIOA, WIOA, Sec 3 (44) and Sec 134(c)(3)(I) authorizes CSRC flexibility under WIOA to increase the reimbursement level up to 75 percent. CSRC's policy allows for 50 percent reimbursement and permits the Vice President of Operations/COO, with approval of the President/CEO, to increase the reimbursement level up to 75 percent taking into consideration the following factors which must be presented at the time of request for approval, and subsequently documented in the OJT Training Plan:

- a.1. The characteristics of the participants (e.g. length of unemployment, current skill level, and barriers to employment)
- b.1. The size of the employer, with an emphasis on small businesses (e.g. small and medium-sized business often have more barriers to participation at lower reimbursement rates)
- c.1. The quality of employer provided training and advancement opportunities (e.g. registered apprenticeships, when the OJT contract is for an in-demand occupation and will lead to an industry-recognized credential).
- d.1. Other factors the Governor or CSRC may determine appropriate (e.g. the number of employees participating in the training, wage and benefit levels of the employees [both pre and post participation earnings], and relation of the training to the competitiveness of the participant)

I. Participant Eligibility

- A. Participants must meet WIOA and/or TAA eligibility and have been determined to need training services. CSRC must apply priority of services requirements for individuals receiving training services through local WIOA Adult formula funds in accordance with CSFL Administrative Policy 105 and 111, as applicable.

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 - OJT Program Policy - May 2025 5.12.25 With Changes WIOA - OJT Program Policy - May 2025

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UNIVERSAL POLICYWORKFORCE INNOVATION & OPPORTUNITY ACT (WIOA)

ON-THE-JOB-TRAINING PROGRAM POLICY

ORIGINAL APPROVAL DATE: 8/15/2007

REVISION DATE: 02/17/20235/21/2025

BOARD EFFECTIVE DATE: 03/01/202305/28/2025

B. Prior to receiving services, an individual employment plan (IEP) or individual service strategy (ISS), must be developed. The ISS/IEP is a living document that must be reviewed regularly by the Career Planner and adjusted throughout participation, jointly with the participant. The IEP is a negotiated agreement between the participant and CSRC detailing what the participant will do to obtain/return to employment and what the program will do to support the participant's efforts. The IEP is an ongoing strategy that must include a clear employment goal, identify assets and barriers, outline the steps necessary to achieve the employment goal, and include appropriate resources and services. The details of the OJT assignment must be incorporated into the ISS and/or IEP and must include the participant's details regarding the OJT assignment, as appropriate. The IEP is a negotiated agreement between the participant and CSRC detailing what the participant will do to obtain/return to employment and what the program will do to support the participant's efforts. The IEP is an ongoing strategy that must include a clear employment goal, identify assets and barriers, outline the steps necessary to achieve the employment goal, and include appropriate resources and services. CSRC staff must also include the following in the IEP:

1. A determination that an OJT activity is appropriate based on an assessment of the participant's needs, skill set, and other characteristics necessary to determine the best activity for the participant.
2. The specific short and long-term goals for the OJT activity, by identifying the purpose of the activity and outcomes the outcomes expected.
3. The employer with whom the activity will be done and other information relevant to the OJT.
4. Other services/activities necessary to support the OJT activity.

C. When enrolling a participant in OJT, CSRC staff must consider:

1. The skill requirements of the occupation.
2. The academic and occupational skill level of the participant.
3. Prior work experience; and
4. The participant's service strategy.

Additionally, OJT may not be suitable for In-School-Youth (ISY) who may be enrolled in secondary school. However, OJT may be an appropriate strategy for eligible youth when the need is identified by the objective assessment and included in the service strategy.

D. OJT contracts may be written for eligible employed workers only when one of the following occurs:

1. The employee is not earning a self-sufficient wage, as defined by CSRC's WIOA Self-Sufficiency Policy, or wages comparable to or higher than wages from previous employment.
2. The OJT relates to the introduction of new technologies, introduction to new production or service procedures, upgrading to new jobs that require additional skills, workplace literacy, or other appropriate purposes identified by CSRC in the local operating procedures (LOPs).
3. There is an OJT contract with an employer or registered apprenticeship program sponsor in the public, private non-profit or private sector.

II. Employer and Occupation Eligibility

C.A. The OJT employer and occupation must meet the following requirements and characteristics:

- a.1. OJT is for an in-demand occupation, that is on the Local Targeted Occupations List
2. OJT is defined as training in the private (for-profit or not-for-profit) sector given to a WIOA-eligible or

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UNIVERSAL POLICYWORKFORCE INNOVATION & OPPORTUNITY ACT (WIOA)

ON-THE-JOB-TRAINING PROGRAM POLICY

ORIGINAL APPROVAL DATE: 8/15/2007

REVISION DATE: 02/17/20235/21/2025

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Welfare Transition (WT) participant who has been referred to and hired by the employer. Preference will be given to the private for-profit sector employers. CSRC must ensure not to enter into an OJT contract with an employer who has exhibited a pattern of failing to provide OJT participants with continued long-term employment as regular employees with wages, benefits, and working conditions at the same level and to the same extent as other similarly situated employees.

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UNIVERSAL POLICYWORKFORCE INNOVATION & OPPORTUNITY ACT (WIOA)

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b.—

c.—OJT is full-time, permanent, paid subsidized employment in which the employer teaches the participant

3. The OJT must be full-time, permanent and paid subsidized employment, in which the employer teaches the participant to perform the skills required for the job. Full-time employment is defined as an average of 3032 hours per week. Occupations or job types that are not suitable for OJT are occupations that are based on commission, seasonal in nature, or less than full time.

4. The training provided for WIOA ~~AWT~~ participants must be above and beyond their current skill levels. CSRC does offer training on a sequential basis to individuals who have completed an Individual Training Account (ITA) where the job for which they have received training requires further training on the job for the participant to be proficient in the skills required to perform the job. All sequential training must be approved by the ~~WIOA Programs Manager~~ Director of Programs on a case-by- case basis.

5. The suitability of the employer worksite for training must be assessed by CSRC staff as part of the contract development, and prior to final completion of the contract and placement of the participant at the work site (OJT Pre-Award).

6. Wages paid to participants must be the same as ~~wages~~ the wages paid to others performing a comparable job. All OJT participants must be covered by worker's compensation or liability insurance for the duration of the employment/training provided by the employer.

7. No member of the OJT trainee's immediate family may be engaged in an administrative capacity for the employer or ~~will~~ directly supervise the OJT trainee.

~~OJT contracts must be submitted to WIOA Programs Management staff for approval and issuance of an OJT Number. The OJT contract will be reviewed to determine if the cost is reasonable and if a related party transaction exists. If the contract involves a related party transaction, CSRC Board of Directors approval is required as defined in the CSRC Administrative Plan.~~

~~Appropriate Career Center services are to be available throughout the duration of the OJT to both the participant and the employer, to ensure the success of the OJT.~~

~~The CSRC Business Services team is responsible for developing OJT contracts with employers to include the preferred industry sectors approved by CSRC throughout the region as reflected in the current CSRC WIOA Local Plan.~~

III. OJT Contract and Training Plan Requirements

A. CSRC must ensure that all OJT is provided under a written contract with an employer using the standardized contract template approved by CareerSource Florida and distributed to CSRC by FloridaCommerce.

Using the template ensures consistency and compliance with organizational standards across the network and is supportive of employer engagement across the system. CSRC may not alter or amend the language in the template. Any supplemental agreement language required to be added by CSRC or local business may be accomplished through a locally created addendum to the agreement. Any such addendums will be subject to compliance monitoring. Failure to use the approved template may result in required corrective action. The OJT contract must be signed by the employer and the President/CEO (or designee) of CSRC.

B. The duration of the OJT is based on the Specific Vocational Preparation code in alignment with the O*Net Job Zone categories. Job Zone categories are listed in the table below:

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UNIVERSAL POLICYWORKFORCE INNOVATION & OPPORTUNITY ACT (WIOA)

ON-THE-JOB-TRAINING PROGRAM POLICY

ORIGINAL APPROVAL DATE: 8/15/2007

REVISION DATE: 02/27/20235/21/2025

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The Five Job Zones Are:	Training Hours
Job Zone 1 - occupations that need little or no preparation	0 - 240
Job Zone 2 - occupations that need some preparation	241 - 640
Job Zone 3 - occupations that need medium preparation	641 - 800
Job Zone 4/5 - occupations that need extensive preparation	801 - 960

In determining the length of the training addition, consideration should be given to the skill requirements of the occupation, the academic and occupational skill level of the trainee, the prior work experience of the trainee, and the individual employment plan as appropriate. OJT training hours will be based on the length of time the trainee will need to acquire the basic competencies needed for the job. The length of the OJT must be included in the OJT contract with the employer and in the participant's ISS/IEP. CSRC OJT contracts may not exceed 6 months.

C.

IV. OJT Training Plan

The OJT training plan is a formal document detailing the structured job training and must provide participants with a combination of instruction in observable, and measurable job-readiness skills, general employment competencies and occupational skills. OJT may be combined with other career and training services, if appropriate. CSRC must ensure that each OJT plan is developed based on the participant's ISS/IEP, and the occupation the participant has selected. The OJT Training Plan must be agreed upon and signed by the participant, employer and CSRC.

Both the OJT contract and training plan must be signed prior to the start date of the OJT.

V. OJT In-Person Worksite Monitoring Visit

CSRC must conduct an in-person monitoring visit to each worksite where an OJT participant is placed during the participant's OJT participation and at least once per year. The purpose of the in-person monitoring visit is to assess the appropriateness of the site and to ensure that it meets all the terms of the worksite agreement. The monitoring site visit must be recorded in a monitoring tool and must include the date of the visit, the name of the CSRC staff member who conducted the visit, names of participant(s) and supervisor(s), and the outcome of the visit. If CSRC identifies any concerns with the site, the information must be recorded in the monitoring tool. CSRC staff must ensure that all identified findings are resolved and documented, including the steps taken, results and timeline, to continue the OJT.

VI. Payments to Employers, Wages and Participant Hours

Payments to employers for OJT must be made based on the OJT contract and proper documentation of time worked, payroll records, and training accomplishments. OJT payments are compensation for the employers' "extraordinary costs" associated with training participants and potentially lower productivity of the participants while in OJT.

A. Wage Reimbursement Rate

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.

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UNIVERSAL POLICYWORKFORCE INNOVATION & OPPORTUNITY ACT (WIOA)

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CSRC may increase the wage reimbursement level above 50 percent up to 75 percent. Requests for 75% reimbursement must take into consideration the following factors which must be presented at the time of request for approval, and subsequently documented in the OJT Training Plan:

1. The characteristics of the participant, taking into consideration whether they are individuals with barriers to employment.
2. The size of the employer, with an emphasis on small businesses (e.g. small and medium-sized businesses) often have more barriers to participation at lower reimbursement rates)
3. The quality of employer-provided training and advancement opportunities (e.g. registered apprenticeships, when the OJT contract is for an in-demand occupation and will lead to an industry-recognized credential).
4. Other factors CSRC may determine appropriate (e.g. the number of employees participating in the training, wage and benefit levels of the employees, and the relation of the training to the competitiveness of the participant).

B. Wage Reimbursement Restrictions

CSRC must ensure WIOA funds are not used to pay for the following:

1. Paid or unpaid holidays.
2. Sick leave.
3. Vacation.
4. Overtime hours.
5. Fringe benefits; and/or
6. Work performed outside the OJT contract.

C. Record Retention

CSRC and employers must retain records for each OJT employer and OJT participant for a minimum of five years. Records regarding the OJT assignment may be requested by FloridaCommerce, USDOL, and other state and federal agencies for monitoring purposes.

D. Reverse Referral

Under certain circumstances OJT initiated through "reverse referral" may be permitted. Reverse referral occurs when an individual is referred to the career center from a prospective employer (under either formal or informal agreement) for assessment as to whether the individual meets the employer's hiring requirements for a specific position and is eligible and suitable for an OJT. Employers must not make or have made a hiring decision prior to the participant becoming eligible for the OJT program through the local career center. Development of an OJT for an individual referred by the employer may be permitted only when:

1. The individual progresses through the intake process as with any other Career Center customer and meets all eligibility requirements.
2. The completed ISS/IEP indicates training is necessary for the individual to perform the work associated with the OJT position for which the employer has an opening.

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.

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UNIVERSAL POLICYWORKFORCE INNOVATION & OPPORTUNITY ACT (WIOA)

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BOARD EFFECTIVE DATE: ~~03/01/2023~~05/28/2025

3. The employer meets all the eligibility requirements under this policy.
4. The employer has not extended an offer of employment to the candidate.
5. The employer assures that the individual has not previously been employed by the employer in the same or similar position.

to perform the skills required for the job. Full time employment is defined as an average of 30 hours per week.

d. The training provided for WIOA/WT participants must be above and beyond their current skill levels. CSRC does offer training on a sequential basis to individuals who have completed an Individual Training Account (ITA) where the job for which they have received training requires further training on the job for the participant to be proficient in the skills required to perform the job. All sequential training must be approved by the WIOA Programs Manager on a case-by-case basis.

e. OJT may be appropriate for eligible employed workers when:

a. The employee is not earning a self-sufficient wage, as defined by CSRC's WIOA Self-Sufficiency Policy, or wages comparable to or higher than wages from previous employment

b. The OJT relates to the introduction of new technologies, introduction to new production or service procedures, upgrading to new jobs that require additional skills, workplace literacy, or other appropriate purposes identified by the Local Workforce Development Board (LWDB) procedures

c. There is an OJT contract with an employer or registered apprenticeship program sponsor in the public, private non-profit or private sector

f. The suitability of the employer worksite for training must be assessed by CSRC staff as part of the contract development, and prior to final completion of the contract and placement of the participant at the work site (OJT Pre-Award).

g. The CSRC Business Services team is responsible for developing OJT contracts with employers to include the preferred industry sectors approved by CSRC throughout the region as reflected in the current CSRC WIOA Local Plan:

h. The OJT Training Plan must be signed by CSRC staff, the employer, and the participant prior to the execution of the OJT contract.

When CSRC enrolls participants in an OJT, a contract with the training worksite must be developed and signed by the employer and the President/CEO of CSRC. The contract must be completed prior to the start of the OJT. CSRC must ensure the following elements are included in the contract:

1. A clear statement of purpose.
2. A job description.
3. A training outline.
4. Requirements of the worksite employer, participant and WIOA service provider or staffing agency.
5. Contact information for the supervisor.
6. The worksite address.
7. Record-keeping, attendance, and payroll information.
8. The duration of the activity.
9. Signature and dates of all parties to the contract/worksite agreement.
10. A process to monitor the participant's worksite activities and ensure adherence to the records retention requirements, as applicable.
11. Required tools, equipment, or uniforms, if applicable.
12. A commitment by the employer to retain the individual(s) upon successful completion of the training.
13. Health and safety standards established under federal and state law otherwise applicable to working conditions of employees shall be equally applicable to working conditions of participants engaged in work-based training activities; and

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UNIVERSAL POLICY WORKFORCE INNOVATION & OPPORTUNITY ACT (WIOA)

ON-THE-JOB-TRAINING PROGRAM POLICY

ORIGINAL APPROVAL DATE: 8/15/2007

REVISION DATE: 02/27/2023 5/21/2025

BOARD EFFECTIVE DATE: 03/01/2023 05/28/2025

14- Signatures of both the worksite employer and the staffing agency, when relevant:

In addition, the following assurances must be contained within the contract:

- 1- Funds will not be used to directly or indirectly aid in the filling of a job opening which is vacant because the former employee is on strike or is being locked out in the course of a labor dispute, or the filling of which is otherwise an issue in a labor dispute involving a work stoppage;
- 2- Funds will not be used to directly or indirectly assist, promote, or deter union organizing;
- 3- Funds will not be used to displace (including a partial displacement, such as a reduction in the hours of non-overtime work, wages, or employment benefits) a current employee (as of the date of participation);
- 4- Funds will not be used to impair an existing contract for services or collective bargaining agreement, and no activity that would be inconsistent with the terms of a collective bargaining agreement shall be undertaken without the written concurrence of the labor organization and employer concerned;
- 5- Funds will not be used to employ a participant in a job if any other individual is on layoff from the same or any substantially equivalent job, or the employer has terminated the employment of any regular employee or otherwise reduced the workforce of the employer with the intention of filling the vacancy created with the participant;
- 6- Funds will not be used to create a promotional line that will infringe in any way upon the promotional opportunities of currently employed individuals (as of the date of the participation);
- 7- Funds will not be used to encourage or induce relocation;
- i- OJTs may not be implemented with an employer who has exhibited a pattern of failing to provide OJT trainees with continued long-term employment;
- j- OJT services must not be implemented with an employer who will be moving from the area;
- k- Prior to a participant being enrolled in OJT, an Individual Employment Plan (IEP) that documents the need for OJT must be developed. The IEP is a negotiated agreement between the participant and CSRC detailing what the participant will do to obtain/return to employment and what the program will do to support the participant's efforts. The IEP is an ongoing strategy that must include a clear employment goal, identify assets and barriers, outline the steps necessary to achieve the employment goal, and include appropriate resources and services. CSRC staff must also include the following in the IEP:
 - a- A determination that an OJT activity is appropriate based on an assessment of the participant's needs, skill set, and other characteristics necessary to determine the best activity for the participant;
 - b- The specific short and long-term goals for the OJT activity, by identifying the purpose of the activity and outcomes expected;
 - c- The employer with whom the activity will be done and other information relevant to the OJT;
 - d- Other services/activities necessary to support the OJT activity;
- l- In determining the length of the training, consideration should be given to the skill requirements of the occupation, the academic and occupational skill level of the trainee, the prior work experience of the trainee, and the individual employment plan as appropriate. OJT training hours will be based on the length of time the trainee will need to acquire the basic competencies needed for the job;
- m- Wages paid to participants must be the same as wages paid to others performing a comparable job. All OJT participants must be covered by worker's compensation or liability insurance for the duration of the employment/training provided by the employer;
- n- No member of the OJT trainee's immediate family may be engaged in an administrative capacity for the employer or will directly supervise the OJT trainee;
- o- OJT contracts must be submitted to WIOA Programs Management staff for approval and issuance of an OJT Number. The OJT contract will be reviewed to determine if the cost is reasonable and if a related party

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WIOA - OJT Program Policy - May 2025 5.12.25 With Changes WIOA - OJT Program Policy - May 2025

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UNIVERSAL POLICYWORKFORCE INNOVATION & OPPORTUNITY ACT (WIOA)

ON-THE-JOB-TRAINING PROGRAM POLICY

ORIGINAL APPROVAL DATE: 8/15/2007

REVISION DATE: ~~02/17/2023~~5/21/2025

BOARD EFFECTIVE DATE: ~~03/01/2023~~05/28/2025

~~transaction exists. If the contract involves a related party transaction, CSRC Board of Directors approval is required as defined in the CSRC Administrative Plan.~~

~~p. Appropriate Career Center services are to be available throughout the duration of the OJT to both the participant and the employer, to ensure the success of the OJT.~~

~~4. Reverse referrals, defined as employer referrals of career seekers to CSRC who are not currently enrolled in workforce services, are permissible only when:~~

~~a. The individual progresses through the intake process as with any other Career Center customer and meets all eligibility requirements.~~

~~b. The completed IEP indicates training is necessary for the individual to perform the work associated with the OJT position.~~

~~c. The employer has not extended an offer of employment to the candidate~~

~~d. The employer assures that the individual has not previously been employed by the employer in the same or similar position.~~

Refer to Universal-WIOA – OJT Program Procedures

Refer to OJT Employer Pre Award Review

Refer to On-the-Job Training Agreement Template

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WIOA - OJT Program Policy - May 2025 5.12.25 With ChangesWIOA - OJT Program Policy - May 2025

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PURPOSE

To outline the requirements for and provide guidance for implementing On-the-Job Training (OJT).

REFERENCES

Public Law 113-128, Workforce Innovation and Opportunity Act, 20 CFR 680.700 - 680.840, 20 CFR 683.400, 20 CFR 683.410, Training and Employment Guidance Letter (TEGL) 19-16, 2 CFR Appendix II to Part 200, Contract Provisions for Non-Federal Entity Contracts Under Federal Awards, Chapter 445, Florida Statutes, CareerSource Florida Strategic Policy 2021.12.09.A.1 – Comprehensive Employment Education and Training Strategy, CareerSource Florida Workforce Policy – Work-Based Training and Work-Based Learning Opportunities and CareerSource Florida Policy 009 – On-the-Job Training.

BACKGROUND:

Among the various training programs available through WIOA for eligible participants, OJT helps employers cover the costs of training new employees. OJT allows participants to earn while they learn, acquire transferable skills, and enhance their financial independence. OJT is uniquely suited to help individuals facing employment barriers to gain a foothold in the workforce. Individuals must meet WIOA eligibility criteria to participate in OJT programs.

Co-enrolling WIOA participants in multiple programs, including OJT, provides comprehensive support by using resources from different programs to meet the needs of job seekers. This approach allows participants to receive job training and educational services at the same time, improving employment outcomes and offering a more complete set of services tailored to their needs.

POLICY:

On-the-Job Training (OJT) is paid subsidized job skills training that is provided by an employer during the initial term of employment. OJT is designed to ensure the participant acquires the employer-specific job skills necessary to secure and maintain employment and provides knowledge or skills essential to the full and adequate performance of the job. The training is limited in duration as appropriate to the occupation for which the participant is being trained and is not to exceed six (6) months. The employer is typically reimbursed 50% of the participant's wages during the OJT period. This reimbursement is designed to offset the employer's costs for providing the job training and any necessary additional supervision.

WIOA, Sec 3 (44) and Sec 134(c)(3)(H) authorizes CSRC flexibility under WIOA to increase the reimbursement level up to 75 percent. CSRC's policy allows for 50 percent reimbursement and permits the Vice President of Operations/COO, with approval of the President/CEO, to increase the reimbursement level to 75 percent in specific situations. Please refer to section [*VI.A Payments to Employers, Wages and Participant Hours for details*](#).

I. Participant Eligibility

- A.** Participants must meet WIOA and/or TAA eligibility and have been determined to need training services. CSRC must apply priority of services requirements for individuals receiving training services through local WIOA Adult formula funds in accordance with CSFL Administrative Policy 105 and 111, as applicable.
- B.** Prior to receiving services, an individual employment plan (IEP) or individual service strategy (ISS), must be developed. The ISS/IEP is a living document that must be reviewed regularly by front-line staff and adjusted throughout participation, jointly with the participant. The IEP is a negotiated agreement between the participant and CSRC detailing what the participant will do to obtain/return to employment and what the program will do to support the participant's efforts. The IEP is an ongoing strategy that must include a clear

employment goal, identify assets and barriers, outline the steps necessary to achieve the employment goal, and include appropriate resources and services. The details of the OJT assignment must be incorporated into the ISS and/or IEP and must include the participant's details regarding the OJT assignment, as appropriate. CSRC staff must also include the following in the IEP:

1. A determination that an OJT activity is appropriate based on an assessment of the participant's needs, skill set, and other characteristics necessary to determine the best activity for the participant.
2. The specific short and long-term goals for the OJT activity, by identifying the purpose of the activity and the outcomes expected.
3. The employer with whom the activity will be done and other information relevant to the OJT.
4. Other services/activities necessary to support the OJT activity.

C. When enrolling a participant in OJT, CSRC staff must consider:

1. The skill requirements of the occupation.
2. The academic and occupational skill level of the participant.
3. Prior work experience; and
4. The participant's service strategy.

Additionally, OJT may not be suitable for In-School-Youth (ISY) who may be enrolled in secondary school. However, OJT may be an appropriate strategy for eligible youth when the need is identified by the objective assessment and included in the service strategy.

D. OJT contracts may be written for eligible employed workers only when one of the following occurs:

1. The employee is not earning a self-sufficient wage, as defined by CSRC's WIOA Self-Sufficiency Policy, or wages comparable to or higher than wages from previous employment.
2. The OJT relates to the introduction of new technologies, introduction to new production or service procedures, upgrading to new jobs that require additional skills, workplace literacy, or other appropriate purposes identified by CSRC in the local operating procedures (LOPs).
3. There is an OJT contract with an employer or registered apprenticeship program sponsor in the public, private non-profit or private sector

II. Employer and Occupation Eligibility

A. The OJT employer and occupation must meet the following requirements and characteristics:

1. OJT is for an in-demand occupation.
2. CSRC must ensure not to enter into an OJT contract with an employer who has exhibited a pattern of failing to provide OJT participants with continued long-term employment as regular employees with wages, benefits, and working conditions at the same level and to the same extent as other similarly situated employees.

3. The OJT must be full-time, permanent and paid subsidized employment, in which the employer teaches the participant to perform the skills required for the job. Full-time employment is defined as an average of 32 hours per week. Occupations or job types that are not suitable for OJT are occupations that are based on commission, seasonal in nature, or less than full time.
4. The training provided for WIOA participants must be above and beyond their current skill levels. CSRC does offer training on a sequential basis to individuals who have completed an Individual Training Account (ITA) where the job for which they have received training requires further training on the job for the participant to be proficient in the skills required to perform the job. All sequential training must be approved by the Director of Programs on a case-by- case basis.
5. The suitability of the employer worksite for training must be assessed by CSRC staff as part of the contract development, and prior to final completion of the contract and placement of the participant at the work site (OJT Pre-Award).
6. Wages paid to participants must be the same as the wages paid to others performing a comparable job. All OJT participants must be covered by worker's compensation or liability insurance for the duration of the employment/training provided by the employer.
7. No member of the OJT trainee's immediate family may be engaged in an administrative capacity for the employer or directly supervise the OJT trainee.

III. OJT Contract Requirements

- A. CSRC must ensure that all OJT is provided under a written contract with an employer using the standardized contract template approved by CareerSource Florida and distributed to CSRC by FloridaCommerce.

Using the template ensures consistency and compliance with organizational standards across the network and is supportive of employer engagement across the system. CSRC may not alter or amend the language in the template. Any supplemental agreement language required to be added by CSRC or local business may be accomplished through a locally created addendum to the agreement. Any such addendums will be subject to compliance monitoring. Failure to use the approved template may result in required corrective action. The OJT contract must be signed by the employer and the President/CEO (or designee) of CSRC.

- B. The duration of the OJT is based on the Specific Vocational Preparation code in alignment with the O*Net Job Zone categories. Job Zone categories are listed in the table below:

The Five Job Zones Are:	Training Hours
Job Zone 1 - occupations that need little or no preparation	0 - 240
Job Zone 2 - occupations that need some preparation	241 -640
Job Zone 3 - occupations that need medium preparation	641 - 800
Job Zone 4/5 - occupations that need extensive preparation	801 - 960

- C. In addition, consideration should be given to the skill requirements of the occupation, the academic and occupational skill level of the trainee, the prior work experience of the trainee, and the individual employment plan as appropriate. OJT training hours will be based on the length of time the trainee will need to acquire the basic competencies needed for the job. The length of the OJT must be included in the OJT contract with the employer and in the participant's ISS/IEP. CSRC OJT contracts may not exceed 6 months.

IV. OJT Training Plan

The OJT training plan is a formal document detailing the structured job training and must provide participants with a combination of instruction in observable, and measurable job-readiness skills, general employment competencies and occupational skills. OJT may be combined with other career and training services, if appropriate. CSRC must ensure that each OJT plan is developed based on the participant's ISS/IEP, and the occupation the participant has selected. The OJT Training Plan must be agreed upon and signed by the participant, employer and CSRC.

Both the OJT contract and training plan must be signed prior to the start date of the OJT.

V. OJT In-Person Worksite Monitoring Visit

CSRC must conduct an in-person monitoring visit to each worksite where an OJT participant is placed during the participant's OJT participation and at least once per year. The purpose of the in-person monitoring visit is to assess the appropriateness of the site and to ensure that it meets all the terms of the worksite agreement. The monitoring site visit must be recorded in a monitoring tool and must include the date of the visit, the name of the CSRC staff member who conducted the visit, names of participant(s) and supervisor(s), and the outcome of the visit. If CSRC identifies any concerns with the site, the information must be recorded in the monitoring tool. CSRC staff must ensure that all identified findings are resolved and documented, including the steps taken, results and timeline, to continue the OJT.

VI. Payments to Employers, Wages and Participant Hours

Payments to employers for OJT must be made based on the OJT contract and proper documentation of time worked, payroll records, and training accomplishments. OJT payments are compensation for the employers' "extraordinary costs" associated with training participants and potentially lower productivity of the participants while in OJT.

A. Wage Reimbursement Rate

CSRC may increase the wage reimbursement level above 50 percent up to 75 percent. Requests for 75% reimbursement must take into consideration the following factors which must be presented at the time of request for approval, and subsequently documented in the OJT Training Plan:

1. The characteristics of the participant, taking into consideration whether they are individuals with barriers to employment.
2. The size of the employer, with an emphasis on small businesses (e.g. small and medium-sized businesses) often have more barriers to participation at lower reimbursement rates)
3. The quality of employer-provided training and advancement opportunities (e.g. registered apprenticeships, when the OJT contract is for an in-demand occupation and will lead to an industry-recognized credential).
4. Other factors CSRC may determine appropriate (e.g. the number of employees participating in the training, wage and benefit levels of the employees, and the relation of the training to the competitiveness of the participant).

B. Wage Reimbursement Restrictions

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CSRC must ensure WIOA funds are not used to pay for the following:

1. Paid or unpaid holidays.
2. Sick leave.
3. Vacation.
4. Overtime hours.
5. Fringe benefits; and/or
6. Work performed outside the OJT contract.

C. Record Retention

CSRC and employers must retain records for each OJT employer and OJT participant for a minimum of five years. Records regarding the OJT assignment may be requested by FloridaCommerce, USDOL, and other state and federal agencies for monitoring purposes.

D. Reverse Referral

Under certain circumstances OJT initiated through “reverse referral” may be permitted. Reverse referral occurs when an individual is referred to the career center from a prospective employer (under either formal or informal agreement) for assessment as to whether the individual meets the employer’s hiring requirements for a specific position and is eligible and suitable for an OJT. Employers must not make or have made a hiring decision prior to the participant becoming eligible for the OJT program through the local career center. Development of an OJT for an individual referred by the employer may be permitted only when:

1. The individual progresses through the intake process as with any other Career Center customer and meets all eligibility requirements.
2. The completed ISS/IEP indicates training is necessary for the individual to perform the work associated with the OJT position for which the employer has an opening.
3. The employer meets all the eligibility requirements under this policy
4. The employer has not extended an offer of employment to the candidate
5. The employer assures that the individual has not previously been employed by the employer in the same or similar position.

Refer to [WIOA – OJT Program Procedures](#)
[Refer to OJT Employer Pre Award Review](#)
[Refer to On-the-Job Training Agreement](#)

Agenda Item 8

AGENDA ITEM SUMMARY

Title	Wagner-Peyser (WP) - Job Orders and Placements Policy Revisions
Strategic Plans/ Goals	Operational Intelligence
Policy/Plan/Law	CareerSource Florida (CSFL) Administrative Policy 099, 20 CFR 651.10, 652, 653.501, 29 CFR 1604, 1606, 1625, 42 U.S.C. 2000
Action Requested	Review and Approve Wagner-Peyser (WP) - Job Orders and Placements Policy Revisions
Background	<p>The purpose of the Employment Service system is to improve the functioning of the nation's labor markets by bringing together qualified job seekers and employers who are seeking workers.</p> <p>CSRC local policy was revised to include changes/additions to the job seeker's service code guide to align with federal and state guidance, as well as to include additional information regarding documenting obtained employment in Employ Florida.</p>
Staff Recommendations	Review and Approve the Wagner-Peyser (WP) - Job Orders and Placements Policy Revisions
Supporting Material	Wagner-Peyser (WP) - Job Orders and Placements Policy and Employ Florida Service Code Guide - April 2025
Board Staff	Tracey McMorris Chief Operating Officers/COO tmcmorris@careesourcerc.com (866) 482-4473 ext. 528



WAGNER-PEYSER JOB ORDERS AND PLACEMENTS POLICY
ORIGINAL APPROVAL DATE: 12/21/2022
REVISION DATE: [5/21/2025](#)
BOARD EFFECTIVE DATE: [9/25/2024](#)

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PURPOSE

The purpose of this policy is to establish CareerSource Research Coast's (CSRC's) minimal requirements for documenting and recording job orders and placements in Employ Florida.

REFERENCES

CareerSource Administrative Policy 099 Job Orders and Placements and CareerSource Administrative Policy 03-040 Wagner-Peyser Migrant and Seasonal Farmworker and Agricultural Employers Services Procedure.

BACKGROUND

The purpose of the Employment Service system is to improve the functioning of the nation's labor markets by bringing together qualified job seekers and employers who are seeking workers.

LOCAL POLICY

I. Job Orders

Job orders are records of job openings containing the material terms and conditions of employment related to wages, hours, working conditions, worksite, and other benefits, submitted by an employer. A job order will be listed in Employ Florida when the following criteria is met.

- Will employ a worker who is legally authorized to work in the United States.
- An employer-employee relationship exists unless the job order is for an independent contractor or unpaid internship position.
- Is currently available and is a non-duplicative position.
- Includes a detailed description of the work to be performed.
- Contains specific hiring requirements a jobseeker must meet.
- Includes referral instructions.
- CSRC has authorization from the employing entity to post the open position.
- The posting party has authorization from the employing entity to post the open position when it is being posted by a third-party poster.
- Is verifiable through email, telephone, online, or as otherwise determined.
- The employing entity has not yet selected a candidate to hire, except in the case of job development.

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A. Types of Job Orders

1. Affirmative Action
2. Agricultural Recruitment System (ARS)
3. Foreign Labor Certification (FLC)
 - a. H2A – Agriculture work
 - b. H2B – Non-agriculture work
4. Permanent Employment Certification (PERM)
5. Apprenticeship
6. Federal Contractor
7. Independent Contractor
8. Internship
9. Job Development
10. Mass Recruitment
11. Private Agency/Staffing Agency

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- WP Job Order Policy -- [SeptemberMay 2025-2024](#)



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B. Job Order Entry

Job orders can be posted by an employer, CSRC staff, a third-party agent, or ~~spidered-imported~~ into Employ Florida from external job posting websites. Open positions listed on other job boards, the employer's website, a classified advertisement, or other resources, cannot be posted in Employ Florida unless authorized by the employer. The following requirements apply to entering a job order in Employ Florida.

1. Authorization must be received from the employer prior to CSRC staff posting a job order in Employ Florida.
2. Authorization may be in the form of a completed job order submission form submitted by the employer or over the phone and then documented on a job order submission form by CSRC staff and case noted in Employ Florida.
3. Job orders received by staff must be entered within one business day of receipt from the employer or third-party agent.
4. Job orders posted by employers or third-party agents in Employ Florida must be reviewed and verified within two business days from the date and time of initial posting into Employ Florida.
5. The practice of withholding job orders from timely entry into Employ Florida or otherwise preventing the sharing of job order information throughout the system, is prohibited.

C. Job Order Compliance Review and Approval

All job orders entered in Employ Florida must comply with Equal Employment Opportunity and Immigration and Nationality Act laws, regulations and guidance as well, as the Employ Florida Terms and Conditions of Use.

1. CSRC staff must conduct a compliance review, which must be documented with a case note including each step taken to verify the job order.
2. If the job order does not meet all compliance requirements, CSRC staff must place the job order "on hold" and contact the employer or third-party agent to review the concerns and request the information needed to bring the job order into compliance, as applicable: If the employer or third-party agent does not agree or cannot be contacted within two business days, the job order must be closed, and a detailed case note must be recorded.
3. Material changes to the terms and conditions of employment are not allowed on published job orders in Employ Florida. Changes to wages, hours, working conditions, worksite, and other benefits, are not allowed once the job order has been enabled in Employ Florida.
4. Once CSRC staff, the employer or third-party agent reaches a consensus on the required updates, staff must close the current job order and either create a new one on behalf of the employer or third-party agent or allow the employer or third-party agent to create a new job order containing the updates.
5. If the CSRC staff, employer, or third-party agent, cannot reach a consensus, staff must close the job order detailing the circumstances which caused the job order to be closed to ensure that anyone who may revisit the employer's job order is aware of prior actions.
6. If staff ~~learns~~ learns that duplicate positions are being posted to advertise a position for which a job order is about to expire, they must contact the employer or third-party agent to explain the process for extending existing job orders or close the duplicate job order. If CSRC staff are unable to contact the employer or third-party agent, or do not receive a response within two business days, the ~~duplicate~~ duplicated job order must be closed with a case note detailing the reason.

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D. Third-Party Agent Job Order Verification

Third-party agents posting job orders on behalf of employers must obtain written consent from the employer and provide it to the CSRC staff via a letter on the employer's letterhead or an email originating from the employer.

4. The consent must be uploaded into Employ Florida in the employer's registration. The written consent must authorize the third-party agent to post open and available positions on the employer's behalf.

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- WP Job Order Policy -- ~~September~~ May
2025-2024



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2.1. The written consent must be stored electronically in Employ Florida and properly documented in the case noted in Employ Florida.

3.2. CSRC staff are required to verify the position with the primary contact listed on the job order prior to approval.

3. If staff ~~isare~~ not able to verify the job order through the job order's primary contact or other approved means within two business days, CSRC staff must close the affected job order and case note the reason.

4.

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E. Using O*NET Occupational Groups for Coding Job Orders

Staff must ensure the O*NET code used for a specific job opening matches the job description.

1. If no match can be found, staff must use the title the employer or third-party agent provided.
2. Only one O*NET code may be used per job order.
3. Placement into job openings that do not match the description in the job order or O*NET code is not permissible.

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F. Recording Wages on Job Orders

It is prohibited to post job orders that pay less than the Florida minimum wage or pay commission only, unless the minimum wage is guaranteed in accordance with federal or state law, or the employer is exempt per the Fair Labor Standards Act and it is documented with a case note in Employ Florida.

1. Employers who choose not to enter actual wage information must enter a minimum value of (\$0.00) on the job order form, as the field cannot be left blank.
2. If it is determined that the job seeker was hired and went to work at a higher wage, the higher wage should be entered on a case note on either the hired jobseeker's placement information or the job order.
3. In the case of multiple positions being filled on one job order, staff should enter a case note for each hired customer stating their name and the wage at which they were hired.

G. Labor Disputes in Progress

CSRC is not allowed to make job referrals on job orders which will aid directly or indirectly in the filling of a job opening that is vacant because the former occupant is on strike or is being locked out in the course of a labor dispute, or the filling of which is otherwise an issue in a labor dispute involving a work stoppage.

1. CSRC staff must verify the existence of the labor dispute and determine its significance with respect to each vacancy involved in the job order and notify all potentially affected staff concerning the labor dispute.
2. Written notice must be provided to all applicants referred to jobs not at issue in the labor dispute that a labor dispute exists in the employing establishment and the job order to which the applicant is being referred is not an issue in the dispute.
3. CSRC staff shall resume full job referral services after they have been notified of and have verified with the employer and worker's representative (s), that the labor dispute has ended.
4. The CSRC staff must document the information in a case note with the job order, including the name of the person with whom they spoke with, the date of contact, and any other pertinent information.

H. Nondiscrimination Requirement

Job orders discriminating against individuals based on race, color, religion, gender, pregnancy, national origin, age, handicap, or marital status cannot be accepted, except where the stated requirement is a bona fide occupational qualification.

4. If an employer claims a bona fide occupational qualification (BFOQ), CSRC staff should advise management prior to listing the job order and the BFOQ status must be documented in the job order's

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- WP Job Order Policy -- SeptemberMay
2025-2024



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ORIGINAL APPROVAL DATE: 12/21/2022
REVISION DATE: [5/21/2025](#)~~8/28/2024~~
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- WP Job Order Policy -- [SeptemberMay 2025-2024](#)



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I. Availability to Migrant and Seasonal Farmworkers (MSFWs)

CSRC must provide adequate staff assistance to MSFWs to easily access job order information in their native language whenever requested or necessary.

J. Agricultural Recruitment System

The Wagner Peyser Act requires the United States Employment Service maintain a system for the orderly movement of workers within and between states.

1. CSRC must refer employers to Florida Commerce for posting job orders to the Agricultural Recruitment System (ARS), which is monitored by Florida Commerce's Senior Monitor Advocate. The ARS provides protection to the workers who are not seeking permanent relocation, but rather temporary agricultural employment.

K. Job Order Retention

The record retention requirement for job orders, those either uploaded into the employer's Employ Florida account, or hard copy in a physical file, is three years.

II. Job Referrals

A staff-assisted job referral is the act of CSRC staff facilitating the match between qualified job seekers and employers with job openings, and the recording of such referral in Employ Florida. At no time should staff provide a job referral to a job seeker who has not completed a full registration, ~~and/or~~ does not meet the minimum requirements of the job order, and/or has not given their consent to being referred to the job. Staff must obtain and record the consent of the job seeker prior to making any job referral.

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A. Referrals Pending Review

CSRC must screen and contact individuals who self-refer to suppressed job orders within seventy-two (72) business hours to either contact the individual for any missing information, inform them they are not qualified for the job, or provide information as appropriate to refer the individual and complete the application process. Staff must also obtain consent of the job seeker prior to making any job referral.

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III. Job Placements

A placement means the hiring by a public or private employer of an individual referred by CSRC or self-referred for a job or an interview, and where CSRC staff completed each of the following steps.

- Prepare, review and approve a job order form entered in Employ Florida.
- Made prior arrangements with the employer for the referral of an individual (s).
- Obtained the individual's consent.
- Referred an individual not specifically designated by the employer, except for referrals on agricultural job orders for a specific crew leader or worker.
- Verified from a reliable source the individual was hired and started work. Verification information must be documented and must include a case note identifying the customer's name, the name of the employer, the source of verification, rate of pay, and the date the customer started working at the designated job site. Notification of an upcoming start or hire date is not acceptable as verification of a start date.

A-IV. Job Development Hires

Job development means the process of securing a job interview with a public or private employer for a specific customer for whom the local office has no suitable opening on file. The job development attempt should be recorded on the job seeker's activity service plan in Employ Florida with a case note listing the employer's name, phone number, address, date of contact, and the position title of the job staff is seeking for the customer.

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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.

- WP Job Order Policy -- SeptemberMay
2025-2024



WAGNER-PEYSER JOB ORDERS AND PLACEMENTS POLICY
ORIGINAL APPROVAL DATE: 12/21/2022
REVISION DATE: 5/21/2025 8/28/2024
BOARD EFFECTIVE DATE: 9/25/2024 5/28/2025

A. If staff learns that the customer was hired on the job to which a job development attempt was made, then the staff person should follow CSRC's Wagner Peyser Job Development Procedure to ensure a job order is recorded appropriately and all required steps are taken. write a job order and take credit for the placement. The job order, at a minimum, must contain in the job description, the phrase "job development."

Once the job order is written to reflect the hire, it must be matched against the job development referral that was previously entered on the job seeker's services screen with the required case notes on the job order and the individual's service screen.

Refer to Wagner-Peyser Job Development Procedure for more details.

B.

B-V. Obtained Employment

Obtained employment refers to those individuals who secure employment within 180 calendar days of receiving one or more services that either trigger or extend program participation, which are fully or partially funded under the Wagner Peyser program, and where the placement does not meet the federal definition for a "job placement." An obtained employment can be entered onto a jobseeker's service plan either manually by staff or automatically by Employ Florida.

A. Manual Obtained Employment

When staff manually records an obtained employment on a jobseeker's service plan, they must verify when the last service that either triggered or extended program participation was recorded. If the jobseeker secured employment within 180 days of receiving said last service, staff must select service code 880-Obtained Employment Manual. If the jobseeker has not received a service that either triggered or extended program participation for at least 90 days, has exited the system and the secured employment does not meet the federal definition of a placement, staff must select service code 882-Obtained Employment Post Exit Manual. More than one obtained employment credit per customer is possible in the same program year, provided it is not duplicating employment already recorded, and the customer has not already exited. Prior to manually recording an obtained employment, CSRC staff must confirm the following.

1. The jobseeker received a service that either triggers or extends program participation.
2. Employment began within 180 days of receiving the last service that either triggers or extends program participation.
3. There are no placements recorded for employment.
4. The obtained employment is unique and has not been previously recorded.
5. Verify from a reliable source that the job seeker has started working and the actual start date.
6. Document in a case note the employer's name, source of verification, certification that the service is not a duplicate of a previously documented placement, actual start date, and CSRC/office information.
7. Sources of documentation used to verify obtained employments may also include hire data obtained from third party resources including but not limited to CONNECT and or the Department of Children and Families' records. Information obtained from sources where quarterly data is reported may be used as a starting point from which to gather a start date. However, quarters in which wages were reported are not sufficient as documentation of a start

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WAGNER-PEYSER JOB ORDERS AND PLACEMENTS POLICY
ORIGINAL APPROVAL DATE: 12/21/2022
REVISION DATE: 5/21/20258/28/2024
BOARD EFFECTIVE DATE: 9/25/20245/28/2025

~~date nor will notification of a hire date.~~

~~It is not allowable to record a placement when a manual obtained employment service code has already been recorded or to take credit for a manual obtained employment where a placement has already been recorded in the system for the same customer, and the same position and start date with the same employer. This would constitute a duplicate placement in the system which is not allowable.~~

~~In the event staff verifies an individual has been placed against a job order, but an obtained employment has already been recorded for the same position and start date with the same employer, staff may void the obtained employment by changing the Completion Code within the service code entry from Successful Completion to Voided and record placement. A case note must be added to the obtained employment service code entry explaining why the code was voided.~~

B. Automated Obtained Employment

A New Hire File from CONNECT, Florida's Reemployment Assistance claims system, interfaces with Employ Florida daily. The file contains new wage information for every individual who has secured a new job. The interface checks for matches between the Social Security NumberSNs in the file with the job seekers' Social Security NumberSN in Employ Florida. When a match is made, Employ Florida verifies when the jobseeker last received a service that triggered or extended program participation. If the jobseeker secured employment within 180 days of receiving said last service, Employ Florida will record service code 881-Obtained Employment Automated. If the jobseeker has not received a service that either triggered or extended program participation for at least 90 days, has exited the system and the secured employment does not meet the federal definition of a placement. Employ Florida will record service code 883, Obtained Employment-Post Exit-Automated.

~~Post Exit Manual Obtained Employment~~

~~Post exit manual obtained employment refers to those individuals who meet the definition of an obtained employment, have gone at least 90 days without a service that either triggers or extends program participation and have exited the system. Credit for a post exit manual obtained employment may be claimed for any participant who has received any Wagner-Peyser service (s) that either triggered or extended program participation, and has a job start date, where both service and start dates fall within 180 days from the date the post exit manual obtained employment is recorded. Staff must verify, preferably through the employer, that the customer has started working prior to taking credit for a post exit manual obtained employment. Notification of a hire date or an anticipated future start date is not acceptable for securing obtained employment credit.~~

~~The post exit manual obtained employment must be created as a Wagner-Peyser follow-up service to the last Wagner-Peyser follow-up service to the last Wagner-Peyser application. Post exit manual obtained employment requires entry and verification of the employer's name, source of verification, certification the service is not a duplicate of a previously documented placement, actual start date and LWDB/office location.~~

Refer to:

CareerSource Administrative Policy 099 Job Orders and Placements

CareerSource Administrative Policy 03-040 Wagner-Peyser Migrant and Seasonal Farmworker and Agricultural Employers Services Procedure

CSRC WP Job Orders and Placements Procedures

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.

- WP Job Order Policy -- SeptemberMay
2025-2024

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WAGNER-PEYSER JOB ORDERS AND PLACEMENTS POLICY
ORIGINAL APPROVAL DATE: 12/21/2022
REVISION DATE: [5/21/2025](#)~~8/28/2024~~
BOARD EFFECTIVE DATE: [9/25/2024](#)~~5/28/2025~~

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[WP Memorandum Changes to Open and Available Job Orders in Employ Florida – July 27, 2021](#)

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- WP Job Order Policy -- [SeptemberMay 2025-2024](#)

PURPOSE

The purpose of this policy is to establish CareerSource Research Coast's (CSRC's) minimal requirements for documenting and recording job orders and placements in Employ Florida.

REFERENCES

CareerSource Administrative Policy 099 Job Orders and Placements and CareerSource Administrative Policy 03-040 Wagner-Peyser Migrant and Seasonal Farmworker and Agricultural Employers Services Procedure.

BACKGROUND

The purpose of the Employment Service system is to improve the functioning of the nation's labor markets by bringing together qualified job seekers and employers who are seeking workers.

LOCAL POLICY**I. Job Orders**

Job orders are records of job openings containing the material terms and conditions of employment related to wages, hours, working conditions, worksite, and other benefits, submitted by an employer. A job order will be listed in Employ Florida when the following criteria is met.

- Will employ a worker who is legally authorized to work in the United States.
- An employer-employee relationship exists unless the job order is for an independent contractor or unpaid internship position.
- Is currently available and is a non-duplicative position.
- Includes a detailed description of the work to be performed.
- Contains specific hiring requirements a jobseeker must meet.
- Includes referral instructions.
- CSRC has authorization from the employing entity to post the open position.
- The posting party has authorization from the employing entity to post the open position when it is being posted by a third-party poster.
- Is verifiable through email, telephone, online, or as otherwise determined.
- The employing entity has not yet selected a candidate to hire, except in the case of job development.

A. Types of Job Orders

1. Affirmative Action
2. Agricultural Recruitment System (ARS)
3. Foreign Labor Certification (FLC)
 - a. H2A – Agriculture work
 - b. H2B – Non-agriculture work
4. Permanent Employment Certification (PERM)
5. Apprenticeship
6. Federal Contractor
7. Independent Contractor
8. Internship
9. Job Development
10. Mass Recruitment
11. Private Agency/Staffing Agency

B. Job Order Entry

Job orders can be posted by an employer, CSRC staff, a third-party agent, or imported into Employ Florida

from external job posting websites. Open positions listed on other job boards, the employer's website, a classified advertisement, or other resources, cannot be posted in Employ Florida unless authorized by the employer. The following requirements apply to entering a job order in Employ Florida.

1. Authorization must be received from the employer prior to CSRC staff posting a job order in Employ Florida.
2. Authorization may be in the form of a completed job order submission form submitted by the employer or over the phone and then documented on a job order submission form by CSRC staff and case noted in Employ Florida.
3. Job orders received by staff must be entered within one business day of receipt from the employer or third-party agent.
4. Job orders posted by employers or third-party agents in Employ Florida must be reviewed and verified within two business days from the date and time of initial posting into Employ Florida.
5. The practice of withholding job orders from timely entry into Employ Florida or otherwise preventing the sharing of job order information throughout the system, is prohibited.

C. Job Order Compliance Review and Approval

All job orders entered in Employ Florida must comply with Equal Employment Opportunity and Immigration and Nationality Act laws, regulations and guidance as well, as the Employ Florida Terms and Conditions of Use.

1. CSRC staff must conduct a compliance review, which must be documented with a case note including each step taken to verify the job order.
2. If the job order does not meet all compliance requirements, CSRC staff must place the job order "on hold" and contact the employer or third-party agent to review the concerns and request the information needed to bring the job order into compliance, as applicable: If the employer or third-party agent does not agree or cannot be contacted within two business days, the job order must be closed, and a detailed case note must be recorded.
3. Material changes to the terms and conditions of employment are not allowed on published job orders in Employ Florida. Changes to wages, hours, working conditions, worksite, and other benefits, are not allowed once the job order has been enabled in Employ Florida.
4. Once CSRC staff, the employer or third-party agent reaches a consensus on the required updates, staff must close the current job order and either create a new one on behalf of the employer or third-party agent or allow the employer or third-party agent to create a new job order containing the updates.
5. If the CSRC staff, employer, or third-party agent, cannot reach a consensus, staff must close the job order detailing the circumstances which caused the job order to be closed to ensure that anyone who may revisit the employer's job order is aware of prior actions.
6. If staff learns that duplicate positions are being posted to advertise a position for which a job order is about to expire, they must contact the employer or third-party agent to explain the process for extending existing job orders or close the duplicate job order. If CSRC staff are unable to contact the employer or third-party agent, or do not receive a response within two business days, the duplicate job order must be closed with a case note detailing the reason.

D. Third-Party Agent Job Order Verification

Third-party agents posting job orders on behalf of employers must obtain written consent from the employer and provide it to the CSRC staff via a letter on the employer's letterhead or an email originating from the employer. The consent must be uploaded into Employ Florida in the employer's registration. The written consent must authorize the third-party agent to post open and available positions on the employer's behalf.

1. The written consent must be stored electronically in Employ Florida and properly documented in the case noted in Employ Florida.

2. CSRC staff are required to verify the position with the primary contact listed on the job order prior to approval.
3. If staff are not able to verify the job order through the job order's primary contact or other approved means within two business days, CSRC staff must close the affected job order and case note the reason.

E. Using O*NET Occupational Groups for Coding Job Orders

Staff must ensure the O*NET code used for a specific job opening matches the job description.

1. If no match can be found, staff must use the title the employer or third-party agent provided.
2. Only one O*NET code may be used per job order.
3. Placement into job openings that do not match the description in the job order or O*NET code is not permissible.

F. Recording Wages on Job Orders

It is prohibited to post job orders that pay less than the Florida minimum wage or pay commission only, unless the minimum wage is guaranteed in accordance with federal or state law, or the employer is exempt per the Fair Labor Standards Act and it is documented with a case note in EmployFlorida.

1. Employers who choose not to enter actual wage information must enter a minimum value of (\$0.00) on the job order form, as the field cannot be left blank.
2. If it is determined that the job seeker was hired and went to work at a higher wage, the higher wage should be entered on a case note on either the hired jobseeker's placement information or the job order.
3. In the case of multiple positions being filled on one job order, staff should enter a case note for each hired customer stating their name and the wage at which they were hired.

G. Labor Disputes in Progress

CSRC is not allowed to make job referrals on job orders which will aid directly or indirectly in the filling of a job opening that is vacant because the former occupant is on strike or is being locked out in the course of a labor dispute, or the filling of which is otherwise an issue in a labor dispute involving a work stoppage.

1. CSRC staff must verify the existence of the labor dispute and determine its significance with respect to each vacancy involved in the job order and notify all potentially affected staff concerning the labor dispute.
2. Written notice must be provided to all applicants referred to jobs not at issue in the labor dispute that a labor dispute exists in the employing establishment and the job order to which the applicant is being referred is not an issue in the dispute.
3. CSRC staff shall resume full job referral services after they have been notified of and have verified with the employer and worker's representative (s), that the labor dispute has ended.
4. The CSRC staff must document the information in a case note with the job order, including the name of the person with whom they spoke with, the date of contact, and any other pertinent information.

H. Nondiscrimination Requirement

Job orders discriminating against individuals based on race, color, religion, gender, pregnancy, national origin, age, handicap, or marital status cannot be accepted, except where the stated requirement is a bona fide occupational qualification. If an employer claims a bona fide occupational qualification (BFOQ), CSRC staff should advise management prior to listing the job order and the BFOQ status must be documented in the job order's case notes.

I. Availability to Migrant and Seasonal Farmworkers (MSFWs)

CSRC must provide adequate staff assistance to MSFWs to easily access job order information in their native language whenever requested or necessary.

J. Agricultural Recruitment System

The Wagner Peyser Act requires the United States Employment Service maintain a system for the orderly movement of workers within and between states.

1. CSRC must refer employers to Florida Commerce for posting job orders to the Agricultural Recruitment System (ARS), which is monitored by Florida Commerce's Senior Monitor Advocate. The ARS provides protection to the workers who are not seeking permanent relocation, but rather temporary agricultural employment.

K. Job Order Retention

The record retention requirement for job orders, those either uploaded into the employer's Employ Florida account, or hard copy in a physical file, is three years.

II. Job Referrals

A staff-assisted job referral is the act of CSRC staff facilitating the match between qualified job seekers and employers with job openings, and the recording of such referral in Employ Florida. At no time should staff provide a job referral to a job seeker who has not completed a full registration, does not meet the minimum requirements of the job order, and/or has not given their consent to being referred to the job. Staff must obtain and record the consent of the job seeker prior to making any job referral.

A. Referrals Pending Review

CSRC must screen and contact individuals who self-refer to suppressed job orders within seventy-two (72) business hours to either contact the individual for any missing information, inform them they are not qualified for the job, or provide information as appropriate to refer the individual and complete the application process. Staff must also obtain consent of the job seeker prior to making any job referral.

III. Job Placements

A placement means the hiring by a public or private employer of an individual referred by CSRC or self-referred for a job or an interview, and where CSRC staff completed each of the following steps.

- Prepare, review and approve a job order form entered in Employ Florida.
- Made prior arrangements with the employer for the referral of an individual (s).
- Obtained the individual's consent.
- Referred an individual not specifically designated by the employer, except for referrals on agricultural job orders for a specific crew leader or worker.
- Verified from a reliable source the individual was hired and started work. Verification information must be documented and must include a case note identifying the customer's name, the name of the employer, the source of verification, rate of pay, and the date the customer started working at the designated job site. Notification of an upcoming start or hire date is not acceptable as verification of a start date.

IV. Job Development Hires

Job development means the process of securing a job interview with a public or private employer for a specific customer for whom the local office has no suitable opening on file. The job development attempt should be recorded on the job seeker's activity service plan in Employ Florida with a case note listing the employer's name, phone number, address, date of contact, and the position title of the job staff is seeking for the customer.

If staff learns that the customer was hired on the job to which a job development attempt was made, then the staff person should follow CSRC's Wagner Peyser Job Development Procedure to ensure a job order is recorded appropriately and all required steps are taken.

V. Obtained Employment

Obtained employment refers to those individuals who secure employment within 180 calendar days of

receiving one or more services that either trigger or extend program participation, which are fully or partially funded under the Wagner Peyser program, and where the placement does not meet the federal definition for a “job placement.” An obtained employment can be entered onto a jobseeker’s service plan either manually by staff or automatically by Employ Florida.

A. Manual Obtained Employment

When staff manually records an obtained employment on a jobseeker’s service plan, they must verify when the last service that either triggered or extended program participation was recorded. If the jobseeker secured employment within 180 days of receiving said last service, staff must select service code 880-Obtained Employment Manual. Prior to manually recording an obtained employment, CSRC staff must confirm the following.

1. The jobseeker received a service that either triggers or extends program participation.
2. Employment began within 180 days of receiving the last service that either triggers or extends program participation.
3. There are no placements recorded for employment.
4. The obtained employment is unique and has not been previously recorded.
5. Verify from a reliable source that the job seeker has started working and the actual start date.

Document in a case note the employer’s name, source of verification, certification that the service is not a duplicate of a previously documented placement, actual start date, and CSRC/office information.

B. Automated Obtained Employment

A New Hire File from CONNECT, Florida’s Reemployment Assistance claims system, interfaces with Employ Florida daily. The file contains new wage information for every individual who has secured a new job. The interface checks for matches between the Social Security Numbers in the file with the job seekers’ Social Security Number in Employ Florida. When a match is made, Employ Florida verifies when the jobseeker last received a service that triggered or extended program participation. If the jobseeker secured employment within 180 days of receiving said last service, Employ Florida will record service code 881-Obtained Employment Automated. If the jobseeker has not received a service that either triggered or extended program participation for at least 90 days, has exited the system and the secured employment does not meet the federal definition of a placement. Employ Florida will record service code 883, Obtained Employment-Post Exit-Automated.

Refer to:

CSRC WP Job Order and Placements Procedures

[WP Memorandum Changes to Open and Available Job Orders in Employ Florida – July 27, 2021](#)

AGENDA ITEM SUMMARY

Title	Wagner-Peyser (WP) - Job Seeker Registration, Application, and Services Policy Revisions
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	CareerSource Florida Administrative Policy 096 – Wagner-Peyser Job Seeker Registration, Application, and Services
Action Requested	Review and Approve Wagner-Peyser (WP) - Job Seeker Registration, Application, and Services Policy Revisions
Background	<p>The purpose of the Employment Service system is to improve the functioning of the nation's labor markets by bringing together qualified job seekers and employers who are seeking workers.</p> <p>The Wagner-Peyser Act, as amended by the Workforce Innovation and Opportunity Act of 2014 (WIOA), provides specific guidelines for job seeker registration. 20 CFR 652.207 requires labor exchange services be made available to all job seekers, including Reemployment Assistance claimants, veterans, migrant and seasonal farmworkers, and individuals with disabilities. As described in the Wagner-Peyser Act, the state must have the capacity to deliver statewide labor exchange services through self-service, facilitated self-help service, and staff-assisted service.</p> <p>CSRC local policy was revised to include changes/additions to the job seeker's service code guide to align with federal and state guidance, as well as additional information detailing the exit process for the Wagner-Peyser application.</p>
Staff Recommendations	Review and Approve the Wagner-Peyser - Job Seeker Registration, Application, and Services Policy Revisions
Supporting Material	Wagner-Peyser - Job Seeker Registration, Application, and Services Policy and Employ Florida Service Code Guide - April 2025
Board Staff	Tracey McMorris Chief Operating Officer/COO tmcmorris@careersourcerc.com (866) 482-4473 ext. 528



PURPOSE

The purpose of this policy is to establish CareerSource Research Coast's (CSRC's) minimum requirements for job seeker registration and services in Employ Florida.

REFERENCES

CareerSource Administrative Policy 096 – Wagner-Peyser Job Seeker Registration, Application, and Services.

BACKGROUND

The purpose of the Employment Service system is to improve the functioning of the nation's labor markets by bringing together qualified job seekers and employers who are seeking workers. Additionally, each state must administer a labor exchange system that can:

- Assist job seekers in finding employment.
- Assist employers in filling jobs.
- Facilitate the match between job seekers and employers.
- Participate in a system allowing for the movement of labor among the states, including the use of a standardized classification system.
- Meet the work test requirements of the Reemployment Assistance program.
- Provide labor exchange services as identified in Section 7(a) of the Wagner-Peyser Act.

The Wagner-Peyser Act, as amended by the Workforce Innovation and Opportunity Act of 2014 (WIOA), provides specific guidelines for job seeker registration. 20 CFR 652.207 requires labor exchange services be made available to all job seekers, including Reemployment Assistance claimants, veterans, migrant and seasonal farmworkers, and individuals with disabilities. As described in the Wagner-Peyser Act, the state must have the capacity to deliver statewide labor exchange services through self-service, facilitated self-help service, and staff-assisted service.

LOCAL POLICY

I. Job Seeker Registration Requirements

- A. ~~Jobseekers who use self-service may be registered in Employ Florida, but registration is not required. Jobseekers receiving Wagner-Peyser funded facilitated self-help and staff assisted services must complete either a partial or full registration in Employ Florida. Jobseekers who use self-service may be registered in Employ Florida, but registration is not required. Jobseekers enrolled as participants in Wagner Peyser or Workforce Innovation and Opportunity Act (WIOA) must have a full registration in Employ Florida prior to receiving any service. seekers receiving Wagner-Peyser funded, facilitated self-help, and staff-assisted services must complete either a partial or full registration in Employ Florida.~~

1. A partial registration includes the elements necessary to establish a record and basic demographic data, but an Occupational Information Network (O*NET) code, background wizard, or resume has not been completed.
2. A full registration includes all elements of a partial registration have been completed and the job seeker has been assigned an O*NET code, completed the background wizard, or entered a resume on their personal profile to include additional essential employment
3. related information such as licenses or certifications that will enhance the placement of the job seeker.

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.

WP – Job Seeker Registration, Application, and Services Policy – ~~September 2024~~May 2025

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B. Job seekers who receive staff-assisted services must have a Wagner-Peyser application in Employ Florida. Job seekers may self-register or career center staff may register a job seeker. ~~If the job seeker has a prior registration in Employ Florida and is unable to remember their system identification or password recovery, staff can aid with recovering system credentials. Staff must record service code 011 with the appropriate case notes within the job seekers' service plan to reflect what assistance was provided.~~ record on the job seeker's activity service plan in Employ Florida with a case note that includes the description of the information/assistance provided and the date.

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~~For staff entered registrations, permission from the job seeker must be received. Staff must record in the job seeker's activity service plan in Employ Florida the permission received and the reason why staff registered rather than the individual completing a self-registration. After confirming the job seeker is not registered in Employ Florida, staff must obtain verbal permission from the job seeker to create the registration. Staff will record service code 13 with the appropriate case notes within the job seekers' service plan documenting the consent. Staff will then register the individual on the Employ Florida website. Once registered, staff will record service code 9 within the job seekers' service plan to document that a registration was completed and the reason for the registration.~~

C. Pseudo Social Security Numbers

~~**B.** If the job seeker has a prior registration in Employ Florida and is unable to remember their system identification or password recovery, staff can aid with recovering system credentials. Staff would record service code 011 with the appropriate case notes within the job seekers' service plan to reflect what assistance was provided. If staff registers a job seeker, they must first receive the job seeker's verbal permission and document in a case note in the job seeker's account.~~

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C. Staff are allowed to create pseudo social security numbers (SSNs) for the sole purpose of registration in Employ Florida.

1. A pseudo-SSN may be created only when a job seeker requests not to use his/her SSN or when a duplicate registration exists.
2. A pseudo-SSN may not be used to create a registration for a job seeker without his/her knowledge and consent due to staff not having the job seeker's SSN.
3. Pseudo-SSNs cannot be created by a job seeker.
4. Once the pseudo number is created, it is the responsibility of staff to enter the registration for the job seeker.
5. Upon completing the registration, staff must enter a case note in the job seeker's Employ Florida account stating the job seeker granted staff permission to create the account with the pseudo-SSN and the reason a pseudo-SSN was used. Please refer to the CSRC Job Seeker Registration, Application, and Services Procedure for details to create a pseudo- SSN in Employ Florida.

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D. Social Security Number Errors

When a job seeker tries to register in Employ Florida and reports that his/her SSN is already in use by another individual, or if staff identify a duplicate registration for a job seeker with a different social security number, staff must resolve the issue when identified with the assistance of the Regional Security Officer. Please refer to the CSRC Job Seeker Registration, Application, and Services Procedure for details.

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II. Wagner-Peyser Application

A. A Wagner-Peyser (WP) application must be completed before any staff-assisted services are provided and recorded in Employ Florida. This includes job referrals and events/services (except for

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.

WP – Job Seeker Registration, Application, and Services Policy – ~~September 2024~~May 2025



WAGNER-PEYSER
JOB SEEKER REGISTRATION, APPLICATION, AND SERVICES POLICY
ORIGINAL APPROVAL DATE: 6/29/2022
REVISION DATE: ~~8/28/2024~~ 5/21/2025
BOARD EFFECTIVE DATE: ~~9/25/2024~~ 5/28/2025

informational workshops) that are set up for tracking using the Events Calendar (e.g., PREP and RESEA-related services). The creation of a WP application is required for the following individuals:

1. Job seekers who need staff-directed assistance in finding employment.
2. Job seekers who are eligible for or receiving services through the following programs.
 - a. Jobs for Veterans State Grant (if being case managed).
 - b. Priority Reemployment Planning (PREP).
 - c. Reemployment Services and Eligibility Assessment (RESEA) and
 - d. Migrant and Seasonal Farmworkers.

- ~~d.~~
3. Claimants complying with state Reemployment Assistance laws or regulations that require registration with the public labor exchange system as a condition for continued receipt or eligibility for benefits.

3.

~~Prior to the creation of the Wagner Peyser application, staff must first conduct an eligibility determination by reviewing the job seeker's application registration for services to determine whether the job seeker meets the requirements to participate in a specific program. Staff will by recording service code 158 the determination in the job seekers' activity service plan with a case note indicating what program they are eligible for. The case note should include the program that the job seeker was deemed eligible. Once deemed eligible for the program, staff will obtain verbal permission from the job seeker to create the Wagner Peyser application. Staff will record service code 13 the permission in the job seeker's activity service plan in Employ Florida with the appropriate case note including the reason for the permission.s within the job seekers' service plan documenting the consent. Staff will also conduct an intake to determine which program to which to refer the job seeker to. Once the intake is completed, staff will record the result of the screening in service code 8 within the job seeker's activity service plan with the appropriate case note including regarding the results of the screening and what program the job seeker was referred to for services in Employ Florida. Once registered, staff must record in the job seeker's activity service plan in Employ Florida the permission received and the reason why staff registered rather than the individual completing a self-registration.~~

~~staff will record service code 9 within the job seekers' service plan to document that a Wagner Peyser application was completed and the reason.~~

- B. Depending on the level of participation (reportable individual or participant) the application may or may not be complete.

4.1. Reportable individuals will have a Wagner Peyser application that indicates "Registration only" and will not include a participation date.

5.2. To initiate participation in the Wagner Peyser application, the participation form must be completed, a participation date must be entered, and a service that initiates participation must be recorded in the activities/enrollments/services sub-application. Please refer to the Wagner Peyser Chapter of the Virtual One-Stop User Guide, [Employ Florida Staff User Guide - Wagner Peyser](#).

III. Recording Services Provided to Job Seekers

- A. The job seeker's activity history/service plan screen in Employ Florida is used to record all services received, including Wagner-Peyser funded basic career services and individualized career services. The purpose of providing services is to enhance the job seeker's ability to become employed.

1. Staff must not record a service on a job seeker's activity history/service plan unless the service was provided with the individual's knowledge.

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.

WP – Job Seeker Registration, Application, and Services Policy – ~~September 2024~~ May 2025

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WAGNER-PEYSER
JOB SEEKER REGISTRATION, APPLICATION, AND SERVICES POLICY
ORIGINAL APPROVAL DATE: 6/29/2022
REVISION DATE: ~~8/28/2024~~5/21/2025
BOARD EFFECTIVE DATE: ~~9/25/2024~~5/28/2025

2. Career center staff must record services provided to job seekers within 15 days of the date the service was provided.
3. The Employ Florida Service Code Guide outlines the various service code titles and definitions as well as the documentation/case note requirements.
4. Wagner-Peyser funded services must be recorded in Employ Florida in accordance with the Employ Florida Service Code Guide.

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B. ~~E.~~ Wagner Peyser Application Exit

~~A jobseeker is considered to have exited the program when the jobseeker has not received for at least 90 consecutive days, a service that triggers or extends participation and does not have a future service that triggers or extends participation scheduled. In this instance, the job seeker is referred to as having "soft exited." A case note must be entered on the jobseeker's case file indicating why the hard exit was done. Additionally, a jobseeker may be "hard exited" from the program if the job seeker:~~

~~1. Has become incarcerated in a correctional institution or has become a resident of an institution or facility providing 24-hour support.~~

~~1.~~

~~2. Is receiving medical treatment that is expected to last longer than 90 days and precludes entry into unsubsidized employment or continued participation in the program.~~

~~2.~~

~~3. Is deceased.~~

~~3.~~

~~4. Is a member of the National Guard or other reserve military unit of the armed forces and is called to active duty for at least 90 days.~~

~~A case note must be entered on the jobseeker's case file indicating why the hard exit was done. Staff may not prolong a job seeker's exit from the program by providing informational only services and recording them as staff-assisted serviced. Further, staff may not prolong a job seeker's exit from the program by recording a service that occurred without the knowledge and consent of the job seeker.~~

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Refer to:

[CareerSource Administrative Policy 096 – Wagner-Peyser Job Seeker Registration, Application, and Services](#)
[CSRC Wagner-Peyser Job Seeker Registration, Application, and Services Procedure](#)
[Employ Florida Service Code Guide for Jobseekers](#)



PURPOSE

The purpose of this policy is to establish CareerSource Research Coast's (CSRC's) minimum requirements for job seeker registration and services in Employ Florida.

REFERENCES

CareerSource Administrative Policy 096 – Wagner-Peyser Job Seeker Registration, Application, and Services.

BACKGROUND

The purpose of the Employment Service system is to improve the functioning of the nation's labor markets by bringing together qualified job seekers and employers who are seeking workers. Additionally, each state must administer a labor exchange system that can:

- Assist job seekers in finding employment.
- Assist employers in filling jobs.
- Facilitate the match between job seekers and employers.
- Participate in a system allowing for the movement of labor among the states, including the use of a standardized classification system.
- Meet the work test requirements of the Reemployment Assistance program.
- Provide labor exchange services as identified in Section 7(a) of the Wagner-Peyser Act.

The Wagner-Peyser Act, as amended by the Workforce Innovation and Opportunity Act of 2014 (WIOA), provides specific guidelines for job seeker registration. 20 CFR 652.207 requires labor exchange services be made available to all job seekers, including Reemployment Assistance claimants, veterans, migrant and seasonal farmworkers, and individuals with disabilities. As described in the Wagner-Peyser Act, the state must have the capacity to deliver statewide labor exchange services through self-service, facilitated self-help service, and staff-assisted service.

LOCAL POLICY

I. Job Seeker Registration Requirements

- A. Jobseekers who use self-service may be registered in Employ Florida, but registration is not required. Jobseekers receiving Wagner-Peyser funded facilitated self-help and staff assisted services must complete either a partial or full registration in Employ Florida. Jobseekers enrolled as participants in Wagner Peyser or Workforce Innovation and Opportunity Act (WIOA) must have a full registration in Employ Florida prior to receiving any service.
 1. A partial registration includes the elements necessary to establish a record and basic demographic data, but an Occupational Information Network (O*NET) code, background wizard, or resume has not been completed.
 2. A full registration includes all elements of a partial registration have been completed and the job seeker has been assigned an O*NET code, completed the background wizard, or entered a resume on their personal profile to include additional essential employment related information such as licenses or certifications that will enhance the placement of the job seeker.
- B. Job seekers who receive staff-assisted services must have a Wagner-Peyser application in Employ Florida. Job seekers may self-register or career center staff may register a job seeker. If the job seeker has a prior registration in Employ Florida and is unable to remember their system identification or password recovery, staff can aid with recovering system credentials. Staff must record on the job



seeker's activity service plan in Employ Florida with a case note that includes the description of the information/assistance provided and the date.

For staff entered registrations, permission from the job seeker must be received. Staff must record in the job seeker's activity service plan in Employ Florida the permission received and the reason why staff registered rather than the individual completing a self-registration.

C. Pseudo Social Security Numbers

Staff are allowed to create pseudo social security numbers (SSNs) for the sole purpose of registration in Employ Florida.

1. A pseudo-SSN may be created only when a job seeker requests not to use his/her SSN or when a duplicate registration exists.
2. A pseudo-SSN may not be used to create a registration for a job seeker without his/her knowledge and consent due to staff not having the job seeker's SSN.
3. Pseudo-SSNs cannot be created by a job seeker.
4. Once the pseudo number is created, it is the responsibility of staff to enter the registration for the job seeker.
5. Upon completing the registration, staff must enter a case note in the job seeker's Employ Florida account stating the job seeker granted staff permission to create the account with the pseudo-SSN and the reason a pseudo-SSN was used. Please refer to the CSRC Job Seeker Registration, Application, and Services Procedure for details to create a pseudo- SSN in Employ Florida.

D. Social Security Number Errors

When a job seeker tries to register in Employ Florida and reports that his/her SSN is already in use by another individual, or if staff identify a duplicate registration for a job seeker with a different social security number, staff must resolve the issue when identified with the assistance of the Regional Security Officer. Please refer to the CSRC Job Seeker Registration, Application, and Services Procedure for details.

II. Wagner-Peyser Application

- A. A Wagner-Peyser (WP) application must be completed before any staff-assisted services are provided and recorded in Employ Florida. This includes job referrals and events/services (except for informational workshops) that are set up for tracking using the Events Calendar (e.g., PREP and RESEA-related services). The creation of a WP application is required for the following individuals:

1. Job seekers who need staff-directed assistance in finding employment.
2. Job seekers who are eligible for or receiving services through the following programs.
 - a. Jobs for Veterans State Grant (if being case managed).
 - b. Priority Reemployment Planning (PREP).
 - c. Reemployment Services and Eligibility Assessment (RESEA) and
 - d. Migrant and Seasonal Farmworkers.
3. Claimants complying with state Reemployment Assistance laws or regulations that require registration with the public labor exchange system as a condition for continued receipt or eligibility for benefits.

Prior to the creation of the Wagner Peyser application, staff must conduct an eligibility determination by reviewing the job seeker's registration for services to determine whether the job seeker meets the requirements to participate in a specific program. Staff will record the determination in the job seekers'



activity service plan with a case note indicating what program they are eligible for. Once deemed eligible for the program, staff will obtain verbal permission from the job seeker to create the Wagner Peyser application. Staff will record the permission in the job seeker's activity service plan in Employ Florida with a case note including the reason for the permission. Staff will also conduct an intake to determine what program to refer the job seeker to. Once the intake is completed, staff will record the result of the screening in the job seeker's activity service plan with a case note including what program the job seeker was referred to for services. Once registered, staff must record in the job seeker's activity service plan in Employ Florida the permission received and the reason why staff registered rather than the individual completing a self-registration.

- B. Depending on the level of participation (reportable individual or participant) the application may or may not be complete.
1. Reportable individuals will have a Wagner Peyser application that indicates "Registration only" and will not include a participation date.
 2. To initiate participation in the Wagner Peyser application, the participation form must be completed, a participation date must be entered, and a service that initiates participation must be recorded in the activities/enrollments/services sub-application. Please refer to the Wagner Peyser Chapter of the Virtual One-Stop User Guide, [Employ Florida Staff User Guide - Wagner Peyser](#).

III. Recording Services Provided to Job Seekers

- A. The job seeker's activity history/service plan screen in Employ Florida is used to record all services received, including Wagner-Peyser funded basic career services and individualized career services. The purpose of providing services is to enhance the job seeker's ability to become employed.
1. Staff must not record a service on a job seeker's activity history/service plan unless the service was provided with the individual's knowledge.
 2. Career center staff must record services provided to job seekers within 15 days of the date the service was provided.
 3. The Employ Florida Service Code Guide outlines the various service code titles and definitions as well as the documentation/case note requirements.
 4. Wagner-Peyser funded services must be recorded in Employ Florida in accordance with the Employ Florida Service Code Guide.

B. **Wagner Peyser Application Exit**

A jobseeker is considered to have exited the program when the jobseeker has not received for at least 90 consecutive days, a service that triggers or extends participation and does not have a future service that triggers or extends participation scheduled. In this instance, the job seeker is referred to as having "soft exited." Additionally, a jobseeker may be "hard exited" from the program if the job seeker:

1. Has become incarcerated in a correctional institution or has become a resident of an institution or facility providing 24-hour support.
2. Is receiving medical treatment that is expected to last longer than 90 days and precludes entry into unsubsidized employment or continued participation in the program.
3. Is deceased.
4. Is a member of the National Guard or other reserve military unit of the armed forces and is called to active duty for at least 90 days.

A case note must be entered on the jobseeker's case file indicating why the hard exit was done. Staff may not prolong a job seeker's exit from the program by providing informational only services and recording them as staff-assisted serviced. Further, staff may not prolong a job seeker's exit from the



program by recording a service that occurred without the knowledge and consent of the job seeker.

Refer to:

[CareerSource Administrative Policy 096 – Wagner-Peyser Job Seeker Registration, Application, and Services](#)

[CSRC Wagner-Peyser Job Seeker Registration, Application, and Services Procedure](#)

[Employ Florida Service Code Guide for Jobseekers](#)

AGENDA ITEM SUMMARY

Title	Review and Approve Risk Evaluation Forms Subrecipient Services - WIOA Youth Services - PY 2025-2026
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Board Policy/Board Responsibility
Action Requested	Review and Approve Risk Evaluation Forms Subrecipient Services - WIOA Youth Services - PY 2025-2026
Background	<p>CareerSource Research Coast entered into a multiple-year sub-recipient procurement to provide WIOA Youth Services.</p> <p>CSRC staff will report to the Board of Directors on the fiscal and programmatic risk evaluation and intent to renew the WIOA Youth Services contract with a current service provider or seek a new sub-recipient.</p>
Staff Recommendations	Review and Approve Risk Evaluation Forms Subrecipient Services - WIOA Youth Services - PY 2025-2026
Supporting Material	Risk Evaluation Forms - Subrecipient Services
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

SUBRECIPIENT CONTRACT FINANCIAL RISK ASSESSMENT

Per 2 CFR 200.206 in Subpart C-Pre-Federal Award Requirements and Contents of Federal Awards, a risk assessment is required to be performed at the beginning of the contract period. This is done to determine if specific conditions (§200.208) need to be imposed.

NEW ☐ RENEWAL ☒ DATE: 05/13/2025 BY: Lisa Delligatti Lisa Delligatti Digitally signed by Lisa Delligatti
Date: 2025.05.13 15:14:30 -04'00'
(Signature & Print Name)

SERVICES PURCHASED: WIOA Youth Services CONTRACT TERM: 7/1/25-6/30/26 AMOUNT: \$750,000.00
SUBRECIPIENT ENTITY NAME/ADDRESS: Eckerd Connects, 100 N Starcrest Drive, Clearwater, FL 33765

Check the applicable box to the right by answering the below questions regarding the above subrecipient entity for the period ending

	YES	NO	COMMENTS
1. Is the entity new to managing grant funds:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
2. Has there been turnover in staff involved with the grant activity.....	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
3. Are personnel involved with the grant new/inexperienced in the grants area.....	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
4. Has the entity developed or implemented new or substantially changed systems.....	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
5. Is the entity involved in any active lawsuits, refer to most current audit report.....	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The outcome of current litigation cannot be determined at the report date. Management believes any potential loss under these claims would be expected to fall within the Organization's insurance policy limits. +
6. Is the entity currently suspended or debarred or have they been suspended or debarred in the past:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
7. Were there any findings or violations from a prior audit.....	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
8. Has any on-site monitoring been performed in the recent years..... and, if so, what were the results of those monitoring visits	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<div>THMP latest monitoring April 2025 - no findings.</div>			
9. Did the entity take timely and appropriate action on all monitoring deficiencies (per §200.332(d)(2))?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	none noted +
10. Has there been any federal awarding agency monitoring..... and, if so, what were the results, even if related to a different award:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<div>No findings noted</div>			
11. Does the entity have an effective financial management system in place:.....	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
12. Does the accounting system identify the receipts and expenditures of programs separately for each award:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
13. Were invoices submitted timely:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
14. Was the contract budget followed:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

15. Recommendation Entity For Contract Renewal (to be completed for contract renewals only):

☒ Yes, Recommended

☐ Yes, Recommended With Reservation

☐ No, Not Recommended

SUBRECIPIENT CONTRACT PROGRAMMATIC RISK ASSESSMENT

Per 2 CFR 200.206 in Subpart C-Pre-Federal Award Requirements and Contents of Federal Awards, a risk assessment is required to be performed at the beginning of the contract period. This is done to determine if specific conditions (§200.208) need to be imposed.

NEW ☐

RENEWAL ☒

DATE: 5/19/25

BY: Kate Sayger

Kate Sayger

Digitally signed by Kate Sayger
Date: 2025.05.19 12:01:01 -0400

(Signature & Print Name)

SERVICES PURCHASED: WIOA Youth Services

CONTRACT TERM: 07/01/25-06/30/26

AMOUNT: \$750,000.00

SUBRECIPIENT ENTITY NAME/ADDRESS: Eckerd Connects

Check the applicable box to the right by answering the below questions regarding the above subrecipient for the period ending 6/30/25.

	EXCELLENT	GOOD	FAIR	POOR
1. Timeliness of implementation of contracted services:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Follow through and completion of agreed upon expectations/services:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Professionalism during service provision:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Quality of services provided & expertise of staff:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	YES	NO	N/A	
5. Were the required # of participants served: (contract renewals only)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6. Was the program implemented as stated in the contract:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7. Is the entity determining eligibility:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
8. Is the entity meeting current reporting requirements:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
9. Is the entity meeting its measurable objectives and/or performance objectives; were deliverables met:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
10. Does the entity apprise of any potential delays or problems:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
11. Does the entity address customer complaints within a reasonable time:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
12. Has there been turnover in the entity's staff involved with the grant activity:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
13. Are personnel involved with the grant new/inexperienced in the grants area:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
14. Has the subrecipient developed or implemented new or substantially changed systems:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
15. Has any on-site monitoring been performed in the recent years. If yes, what were the results of those monitoring visits: <small>Zero ONIs or findings from January 2025 FloridaCommerce monitoring.</small>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
16. Did the entity take timely and appropriate action on all monitoring deficiencies	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

17. Recommendation Contractor For Contract Renewal (to be completed for contract renewals only):

Yes, Recommended ☒

Yes, Recommended With Reservation ☐

No, Not Recommended ☐

AGENDA ITEM SUMMARY

Title	Review and Approve Renewable Vendor Contracts for PY 2025-2026
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Board Policy/Board Responsibility
Action Requested	Review and Approve Renewal of Contracts
Background	<p>CareerSource Research Coast enters into multiple-year contracts with several vendors.</p> <p>Each year of the Vendor Contract term, CSRC staff will report to the Board of Directors on the performance and intent to renew the contract(s) or seek new vendor(s)/provider(s).</p> <p>Contracts to be renewed include Employer of Record, Audit Services, Legal, and Monitoring Services</p>
Staff Recommendations	Approve contract renewals for Program Year 2025-2026
Supporting Material	Performance Memos, Engagement Letter
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

Memorandum**Risk Assessment Summary Memo for Famosa, Inc., dba Manpower
RFP# 22-002-EOR**

CareerSource Research Coast (CSRC) awarded Famosa Inc, d/b/a Manpower (Manpower), the above noted RFP for the period July 1, 2022, to June 30, 2027. Currently CSRC is entered in a vendor contract with Manpower started on 7/1/2024 and ending on 6/30/2025. Under 200.331 this award has clearly been identified to a vendor.

CareerSource Research Coast staff review the monthly invoices received from Manpower for financial accuracy and compliance.

An external independent monitoring firm performs a review of additional aspects of the documentation to determine compliance with all requirements. Current procedures require that any errors or deficiencies are addressed, documented, and reviewed for correction.

In addition, we have received and reviewed the Audited Financial Statements for Famosa Inc., dba Manpower as of December 31, 2022, 2023 and 2024. It was noted that Manpower appears financially sufficient to provide contract reimbursable services. Manpower has proven over the years to understand the actions, procedures and requirements that need to occur to make our organization and programs successful. Full satisfaction was met during this program year, July 1, 2024, through the date of this memorandum, May 7, 2025. The Manpower staffing management team respond on all issues of concern and requests submitted for special reporting.

Based on their performance over the past year, staff recommends renewal of the Manpower EOR contract for the period of July 1, 2025, through June 30, 2026. The EOR contract is for 2 more years, renewable annually.

APPROVED
By Brian Bauer at 4:55 pm, May 07, 2025

memorandum

To: Brian K. Bauer, President/CEO

From: Lisa Delligatti, Chief Financial Officer

RE: Performance Evaluation of Taylor Hall Miller & Parker,

P.A. Date: May 15, 2025

APPROVED

By Brian Bauer at 8:43 am, May 15, 2025

The Independent Monitoring/CPA firm named above has performed their monitoring engagement satisfactorily for this past program year by completing all work timely, making themselves available for consultation and when necessary, responding promptly when needed. The firm kept costs in line with the agreed upon amount as contracted. As such, the recommendation is to renew the contract for an additional one-year period effective July 1, 2025 through June 30, 2026.

June 6, 2025

VIA EMAIL bbauer@careersourcerc.com

Mr. Brian Bauer
President/CEO
Workforce Board of the Treasure Coast d/b/a CareerSource Research Coast

RE: Engagement of Lippes Mathias LLP

Dear Mr. Bauer:

Thank you for continuing to retain Lippes Mathias LLP (the "Firm" or "Lippes") as your legal counsel for the upcoming program year, July 1, 2025 through June 30, 2026. This letter will confirm the terms of the Firm's representation during that Program Year. In addition, this letter will explain our fees and billing procedures, as well as what Workforce Board of the Treasure Coast d/b/a CareerSource Research Coast (the "Client" or "CareerSource"), can expect from us and what we expect from the Client.

The Firm will represent the Client in this matter on an hourly rate basis. Any other matters that the Client wishes the Firm to handle will be the subject of a separate agreement. The Firm is not, for example, advising the Client under this agreement on the tax consequences of the real or potential outcome of any litigation, corporate tax issues, or regulatory and compliance issues.

During this upcoming Program Year, we have agreed to offer CareerSource a special rate, time spent by Bari L. Goldstein is currently charged at \$350.00 per hour and time spent by other Firm attorneys will range from \$220.00 to \$350.00; however, certain matters may require higher rates and such work will be discussed with Client before any such work is performed. Time spent by any law clerk or para-professional is currently charged at \$140.00 per hour. Our hourly rates are subject to change from time to time during our representation in this matter and insurance matters may be billed at a different rate, agreed upon by your carrier.

We bill fees and other services on a monthly basis and payment is due upon the Client's receipt of the invoice.

Bari L. Goldstein | Partner | bgoldstein@lippes.com

4420 Beacon Circle, West Palm Beach, FL 33407 **Phone:** 561.842.3000 **lippes.com**

New York: Albany, Buffalo, Clarence, Long Island, New York City, Rochester, Saratoga Springs, Syracuse // **Florida:** Jacksonville, West Palm Beach
Illinois: Chicago // **Ohio:** Cleveland // **Oklahoma:** Oklahoma City // **Ontario:** Greater Toronto Area // **Texas:** San Antonio // **Washington, D.C.**



REASONABLENESS OF FEE

If at any time you believe the Firm's interim periodic hourly bills are not fair and reasonable, you agree that you will notify the Firm within thirty (30) days of the date of the questioned invoice, and together, you and the Firm will review the invoice. If no notice is received, it is understood that the invoice is accepted by you as correct and accurate, and as setting forth fair and reasonable charges for services rendered.

If at any time the Client wants to terminate our services, please notify the undersigned in writing. Likewise, if at any time we find that we are unable to continue representing the Client, we will notify you in writing. We reserve the right to terminate our representation if the Client fails to comply with the terms of this fee agreement, or as allowed by the terms of the Florida Rules of Professional Conduct, and the client agrees not to contest our withdrawal from any court or administrative proceeding in such event. As soon as possible after any such termination, a final statement will be prepared and sent to the Client. Should the Firm's representation be terminated for any reason, the Client agrees to promptly pay, within the following thirty (30) days, for all attorneys' fees and costs incurred through the date of such termination. In the event any action is brought to enforce this Agreement, you agree to the venue for any related court cases being in Circuit Court in Palm Beach County, Florida. The prevailing party in any proceedings shall be entitled to recover its costs of enforcement including, without limitation, reasonable attorneys' fees and court costs required to collect any balance due, in court.

Client hereby grants to the Firm a lien on all monies, records and documents held by the Firm, and Client further acknowledges that the Firm has a lien on all causes of action and proceedings from the time the causes of action arise or the proceedings begin, and on all settlements, judgments, proceeds, property, real or tangible, and awards that Client receives as a result of legal services that the Firm provides, as security for payment of compensation due the Firm and such disbursements as may be advanced by the Firm in connection with all of Client's affairs in which we represent you. In situations where the Firm is representing multiple Clients in the same Matter, you agree that each of said Clients shall be jointly and severally liable for all debts owed to the Firm arising from the Firm's representation of you.

We will perform the legal services which we have agreed to undertake on the Client's behalf in a professional manner and we will keep you informed of all material developments in a reasonable and timely manner. To enable us to do this, the Client agrees to disclose such facts as are requested and which are reasonably necessary for us to perform the services for which they have retained us. Although we may give the client our professional judgment regarding a matter, as to the likelihood of a favorable outcome on a particular case, the amount of a potential recovery, what a clause in a document says, or whether a particular contract or negotiation will result in the desired outcome, we are never able to guarantee any of these. We will, however, endeavor to give the Client our best judgment in light of the law and the particular facts made known to us.

After you have had the opportunity to review this proposed fee agreement, please feel free to call me with any comments or questions you may have. If the agreement meets with your approval, please sign where indicated below to evidence your agreement with the matters set forth herein and return same to me.



Very truly yours,

LIPPES MATHIAS LLP

A handwritten signature in blue ink, appearing to read 'Bari L. Goldstein', with a long, sweeping horizontal line extending to the right.

Bari L. Goldstein, Esq.

READ AND AGREED TO THIS _____
day of _____, 2025

Workforce Board of the Treasure Coast
d/b/a CareerSource Research Coast

memorandum

To: Brian K. Bauer, President/CEO

From: Lisa Delligatti, Chief Financial Officer

RE: Performance Evaluation of James Moore Co.

Date: May 15, 2025

APPROVED

By Brian Bauer at 8:41 am, May 15, 2025

The Auditing/CPA firm named above has performed their PY24-25 engagement satisfactorily for this past program year by completing all work timely, making themselves available for consultation and when necessary, responding promptly when needed. The firm kept costs in line with the agreed upon amount as contracted. As such, the recommendation is to renew the contract for an additional one-year period effective July 1, 2025, through June 30, 2026.

AGENDA ITEM SUMMARY

Title	Review and Approve Board Member CSF Contract/COI Exemption Requests - PY 2025-2026
Strategic Goal	Optimal Use of Resources
Policy/Plan/Law	CareerSource Florida Strategic Policy # 2012.05.24.A.2
Action Required	Review and Approve Board Member CSF Contract/COI Exemption Requests - PY 2025-2026
Background	<p>Under CSFL Strategic Policy # 2012.05.24.A.2, the policy establishes criteria and procedures used to address potential conflicts of interest and, when appropriate, “cure” such conflicts and ensure compliance with Public Law 113-128, Workforce Innovation and Opportunity Act (2014), section 445.007(1) and (11), Florida Statutes, and section 112.3143, Florida Statutes.</p> <p>At a board’s discretion, the following may be exempt from the policy described above:</p> <p>Contracts with a board member receiving a grant for workforce services. All contracts between a board and a board member or other person or entity who may benefit financially from a contract must be approved by a two-thirds vote of the board when a quorum has been established. Board members are required to complete a Contract Information Form and a Conflict of Interest Form.</p>
Staff Recommendation	Review and Approve Board Member CSF Contract/COI Exemption Requests - PY 2025-2026
Supporting Materials	Board Member CSF Contract/COI Exemption Request/Form 8B - PY2025-2026
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

Board Member Contract-COI Exemption Form - 2025-2026

Date	Vendor	Party	Description	Purpose	Expense	State of Florida Approved Vendor	Low Bid	Comments
PY 25-26	Boys & Girls Club of St. Lucie County	William Armstead	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	Approved training provider TANF Summer Youth Teen Pregnancy Prevention Program	not to exceed \$60,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 25-26	Cleveland Clinic Indian River Hospital	Lorna Landherr	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	On-the-Job Training	under \$100,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 25-26	Indian River State College	Dr. Timothy Moore	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	Approved Training Provider	under \$125,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 25-26	Indian River State College	Dr. Timothy Moore	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	Facility Use Agreement for the Eckerd Connects Career Centers	under \$10,000	n/a	n/a	A contract with a board member's employer, Indian River State College, to receive rent for facility usage at the Chastain, Pruitt, and Meuller Campuses for the Eckerd Connects Career Centers.
PY 25-26	Keiser University	Leslie Kristof	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	Approved Training Provider	under \$125,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 25-26	Moore Solutions, Inc.	Terrance Moore	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	Worksite Agreement for WIOA Youth Work Experience	under \$10,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 25-26	The Porch Factory	Jim Brann	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	On-the-Job Training	under \$30,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 25-26	R.V. Johnson Insurance	Kelly Johnson	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	On-the-Job Training	under \$10,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 25-26	Treasure Coast Builders Association	Deb Frazier	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	On-the-Job Training	under \$10,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 25-26	Treasure Coast Technical College	Dr. David Moore	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	Facility Use Agreement for the Eckerd Connects Career Center	under \$10,000	n/a	n/a	A contract with a board member's employer, Treasure Coast Technical College (TCTC), School District of Indian River County, to receive rent for facility usage at TCTC for the Eckerd Connects Career Center.
PY 25-26	Treasure Coast Technical College	Dr. David Moore	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	Approved Training Provider	under \$50,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 25-26	Walmart Distribution Center	David Bean	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	On-the-Job Training	under \$10,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.



CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, James Brann, hereby certify the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: CareerSource Research Coast/LWDB 20

Contractor Name & Address: William Armstead, Boys and Girls Club of St. Lucie County, 3104 Avenue J, Ft. Pierce, FL 34947

Contractor Contact Phone Number: 772-460-9918

Contract Number or Other Identifying Information, if any: n/a

Contract Term: PY 25-26

Value of the Contract with **no** extensions or renewals exercised: Under \$ 60,000

Value of the Contract with **all** extensions and renewals exercised: n/a

Description of goods and/or services to be procured: Approved training provider TANF Summer Youth Teen Pregnancy Prevention Program

Method of procurement for the goods and/or services to be procured: n/a

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: William Armstead

The nature of the conflicting interest in the contract: Financial gain to parent organization

The board member or employee with the conflict of interest _____ did _____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
- A draft copy of the related party contract and amendments, as applicable.
- Documentation supporting the method of procurement of the related party contract.
- A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann
Print Name

**Must be certified and attested to by the Board Chair*

Date



**DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT**

I, William Armstead, a board member, hereby disclose that My employer

Or "Other"(describe): _____ could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB 20

Contractor Name & Address: William Armstead, Boys and Girls Club of St. Lucie County, 3104 Avenue J, Ft. Pierce, FL 34947

Contractor Contact Phone Number: 772-460-9918

Description or Nature of Contract: Approved training provider TANF Summer Youth Teen Pregnancy Prevention Program

Description of Financial Benefit*: Financial gain to parent organization

For purposes of the above contract the following disclosures are made: The contractor's principals**/owners***: (check one)

☒ have no relative who is a member of the board or an employee of the board; OR

☐ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** ☒ is ☐ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee Print Name

William Armstead

Print Name

Date

*"Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST ABSTAIN FROM VOTING DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.

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

LAST NAME – FIRST NAME – MIDDLE NAME Armstead, William		NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE CareerSource Research Coast/LWDB 20
MAILING ADDRESS 3104 Avenue J		THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
CITY Ft. Pierce	COUNTY St. Lucie County	NAME OF POLITICAL SUBDIVISION:
DATE ON WHICH VOTE OCCURRED June 25, 2025		MY POSITION IS <input type="checkbox"/> ELECTIVE <input checked="" 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, William Armstead, hereby disclose that on June 25, 2025

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 Boys and Girls Club of St. Lucie County, 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.



CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, James Brann, hereby certify the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: CareerSource research Coast/LWDB 20

Contractor Name & Address: Lorna Landherr, Cleveland Clinic Indian River Hospital, 1000 36th Street, Vero Beach, FL 32960

Contractor Contact Phone Number: 772-789-8536

Contract Number or Other Identifying Information, if any: n/a

Contract Term: PY 25-26

Value of the Contract with **no** extensions or renewals exercised: Under \$100,000

Value of the Contract with **all** extensions and renewals exercised: n/a

Description of goods and/or services to be procured: On the Job Training Contract

Method of procurement for the goods and/or services to be procured: n/a

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: Lorna Landherr

The nature of the conflicting interest in the contract: Financial gain to parent organization

The board member or employee with the conflict of interest ____ did ____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
- A draft copy of the related party contract and amendments, as applicable.
- Documentation supporting the method of procurement of the related party contract.
- A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann

Print Name

**Must be certified and attested to by the Board Chair*

Date



**DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT**

I, Lorna Landherr, a board member, hereby disclose that My employer

Or "Other"(describe): _____ could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB 20

Contractor Name & Address: Lorna Landherr, Cleveland Clinic Indian River Hospital, 1000 36th Street, Vero Beach, FL 32960

Contractor Contact Phone Number: 772-789-8536

Description or Nature of Contract: On the Job Training Contract

Description of Financial Benefit*: Financial gain to parent organization

For purposes of the above contract the following disclosures are made: The contractor's principals**/owners***: (check one)

☒ have no relative who is a member of the board or an employee of the board; OR

_____ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** ☒ is _____ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee Print Name

Lorna Landherr

Print Name

Date

*"Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST ABSTAIN FROM VOTING DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.

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

LAST NAME – FIRST NAME – MIDDLE NAME Landherr, Lorna		NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE CareerSource Research Coast/LWDB 20
MAILING ADDRESS 1000 36th Street		THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
CITY Vero Beach	COUNTY Indian River	NAME OF POLITICAL SUBDIVISION:
DATE ON WHICH VOTE OCCURRED June 25, 2025		MY POSITION IS <input type="checkbox"/> ELECTIVE <input checked="" 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, Lorna Landherr, hereby disclose that on June 25, 2025

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 Cleveland Clinic Indian River Hospital, 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.



CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, James Brann, hereby certify that the the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: CareerSource Research Coast/LWDB 20

Contractor Name & Address: Dr. Timothy Moore, Indian River State College, 3209 Virgina Avenue, Ft. Pierce, FL 34981

Contractor Contact Phone Number: 772-462-4701

Contract Number or Other Identifying Information, if any: n/a

Contract Term: PY 25-26

Value of the Contract with **no** extensions or renewals exercised: Under \$125,000

Value of the Contract with **all** extensions and renewals exercised: n/a

Description of goods and/or services to be procured: Occupational Skills Provider from Eligible Training Provider

Method of procurement for the goods and/or services to be procured: n/a

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: Dr. Timothy Moore

The nature of the conflicting interest in the contract: Financial gain to parent organization

The board member or employee with the conflict of interest _____ did _____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
- A draft copy of the related party contract and amendments, as applicable.
- Documentation supporting the method of procurement of the related party contract.
- A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann

Print Name

**Must be certified and attested to by the Board Chair*

Date



**DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT**

I, Timothy Moore, a board member, hereby disclose that My employer

Or "Other"(describe): _____ could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB 20

Contractor Name & Address: Timothy Moore, Indian River State College, 3209 Virginia Avenue, Ft. Pierce, FL 34981

Contractor Contact Phone Number: n/a

Description or Nature of Contract: Occupational skills training from Eligible Training Provider

Description of Financial Benefit*: Financial gain to parent organization

For purposes of the above contract the following disclosures are made: The contractor's principals**/owners***: (check one)

☒ have no relative who is a member of the board or an employee of the board; OR
☐ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** ☒ is ☐ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee Print Name

Timothy Moore

Print Name

Date

*"Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST ABSTAIN FROM VOTING DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.



CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, James Brann, hereby certify the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: CareerSource Research Coast/LWDB20

Contractor Name & Address: Prashanth Pilly, Indian River State College, 3209 Virginia Avenue, Ft. Pierce, FL 34981

Contractor Contact Phone Number: 772-462-7212

Contract Number or Other Identifying Information, if any: n/a

Contract Term: PY25-26

Value of the Contract with **no** extensions or renewals exercised: Under \$125,000

Value of the Contract with **all** extensions and renewals exercised: n/a

Description of goods and/or services to be procured: Occupational Skills Provider from Eligible Training Provider

Method of procurement for the goods and/or services to be procured: n/a

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: Prashanth Pilly

The nature of the conflicting interest in the contract: Financial gain to parent organization

The board member or employee with the conflict of interest _____ did _____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
- A draft copy of the related party contract and amendments, as applicable.
- Documentation supporting the method of procurement of the related party contract.
- A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann

Print Name

**Must be certified and attested to by the Board Chair*

Date



**DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT**

I, Prashanth Pilly, a board member, hereby disclose that My employer

Or "Other"(describe): _____ could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB20

Contractor Name & Address: Prashanth Pilly, Indian River State College, 3209 Virginia Avenue, Ft. Pierce, FL 34981

Contractor Contact Phone Number: 772-287-3366

Description or Nature of Contract: Occupational skills training from Eligible Training Provider

Description of Financial Benefit*: Financial gain to parent organization

For purposes of the above contract the following disclosures are made: The contractor's principals**/owners***: (check one)

☐ have no relative who is a member of the board or an employee of the board; OR

☐ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** ☐ is ☐ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee Print Name

Prashanth Pilly

Print Name

Date

*"Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST ABSTAIN FROM VOTING DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.

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

LAST NAME – FIRST NAME – MIDDLE NAME Pilly, Prashanth	NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE CareerSource Research Coast/LWDB 20
MAILING ADDRESS 3209 Virginia Avenue	THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
CITY Ft. Pierce	COUNTY St ,Lucie
DATE ON WHICH VOTE OCCURRED June 25, 2025	NAME OF POLITICAL SUBDIVISION: MY POSITION IS <input type="checkbox"/> ELECTIVE <input checked="" 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, Prashanth Pilly, hereby disclose that on June 25, 20: 25

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 Indian River State College, 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.



CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, James Brann, hereby certify that the the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: CareerSource Research Coast/LWDB 20

Contractor Name & Address: Timothy Moore, Indian River State College, 3209 Virginia Avenue, Ft. Pierce, FL 34981

Contractor Contact Phone Number: 772-462-4701

Contract Number or Other Identifying Information, if any: n/a

Contract Term: PY 25-26

Value of the Contract with **no** extensions or renewals exercised: Under \$10,000

Value of the Contract with **all** extensions and renewals exercised: n/a

Description of goods and/or services to be procured: Facility Use Agreement at the Chastain, Pruitt, and Meuller Campuses for the Eckerd Connects Career Centers

Method of procurement for the goods and/or services to be procured: n/a

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: Dr. Timothy Moore

The nature of the conflicting interest in the contract: Financial gain to parent organization

The board member or employee with the conflict of interest _____ did _____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
- A draft copy of the related party contract and amendments, as applicable.
- Documentation supporting the method of procurement of the related party contract.
- A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann

Print Name

**Must be certified and attested to by the Board Chair*

Date



**DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT**

I, Timothy Moore, a board member, hereby disclose that My employer

Or "Other"(describe): _____ could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB20

Contractor Name & Address: Timothy Moore, Indian River State College, 3209 Virginia Avenue, Ft. Pierce, FL 34981

Contractor Contact Phone Number: 772-462-4701

Description or Nature of Contract: Facility Use Agreement at the Chastain, Pruitt, and Meuller Campuses for the Eckerd Connects

Description of Financial Benefit*: Financial gain to parent organization

For purposes of the above contract the following disclosures are made: The contractor's principals**/owners***: (check one)

☒ have no relative who is a member of the board or an employee of the board; OR
☐ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** ☒ is ☐ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee Print Name

Timothy Moore

Print Name

Date

*"Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST ABSTAIN FROM VOTING DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.



CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, James Brann, hereby certify the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: CareerSource Research Coast/LWDB20

Contractor Name & Address: Prashanth Pilly, Indian River State College, 3209 Virginia Avenue, Ft. Pierce, FL 34981

Contractor Contact Phone Number: 772-462-7212

Contract Number or Other Identifying Information, if any: n/a

Contract Term: PY25-26

Value of the Contract with **no** extensions or renewals exercised: Under \$10,000

Value of the Contract with **all** extensions and renewals exercised: n/a

Description of goods and/or services to be procured: Facility Use Agreement at the Chastain, Pruitt, and Meuller Campuses for the Eckerd Connects Career Centers

Method of procurement for the goods and/or services to be procured: n/a

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: Prashanth Pilly

The nature of the conflicting interest in the contract: Financial gain to parent organization

The board member or employee with the conflict of interest _____ did _____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
- A draft copy of the related party contract and amendments, as applicable.
- Documentation supporting the method of procurement of the related party contract.
- A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann

Print Name

**Must be certified and attested to by the Board Chair*

Date



**DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT**

I, Prashanth Pilly, a board member, hereby disclose that My employer

Or "Other"(describe): _____ could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB20

Contractor Name & Address: Prashanth Pilly, Indian River State College, 3209 Virginia Avenue, Ft. Pierce, FL 34981

Contractor Contact Phone Number: 772-287-3366

Description or Nature of Contract: Facility Use Agreement at the Chastain, Pruitt, and Meuller Campuses for the Eckerd Connects Career Centers

Description of Financial Benefit*: Financial gain to parent organization

For purposes of the above contract the following disclosures are made: The contractor's principals**/owners***: (check one)

☒ have no relative who is a member of the board or an employee of the board; OR

☐ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** ☒ is ☐ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee Print Name

Prashanth Pilly

Print Name

Date

*"Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST ABSTAIN FROM VOTING DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.

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

LAST NAME – FIRST NAME – MIDDLE NAME Pilly, Prashanth	NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE CareerSource Research Coast/LWDB 20
MAILING ADDRESS 3209 Virginia Avenue	THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
CITY Ft. Pierce	COUNTY St. Lucie
DATE ON WHICH VOTE OCCURRED June 25, 2025	NAME OF POLITICAL SUBDIVISION: MY POSITION IS <input type="checkbox"/> ELECTIVE <input checked="" 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, Prashanth Pilly, hereby disclose that on June 25, 20: 25

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 Indian River State College, 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.



CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, James Brann, hereby certify the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: CareerSource Research Coast/LWDB 20

Contractor Name & Address: Leslie Kristof, Keiser University, 9400 SW Discovery Way, Port St. Lucie, FL 34987

Contractor Contact Phone Number: 772-398-9990

Contract Number or Other Identifying Information, if any: n/a

Contract Term: PY 25-26

Value of the Contract with **no** extensions or renewals exercised: Under \$125,000

Value of the Contract with **all** extensions and renewals exercised: n/a

Description of goods and/or services to be procured: Occupational Skills Training from Eligible Training Provider

Method of procurement for the goods and/or services to be procured: n/a

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: Leslie Kristof

The nature of the conflicting interest in the contract: Financial gain to parent organization

The board member or employee with the conflict of interest _____ did _____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
- A draft copy of the related party contract and amendments, as applicable.
- Documentation supporting the method of procurement of the related party contract.
- A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann

Print Name

**Must be certified and attested to by the Board Chair*

Date



**DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT**

I, Leslie Kristof, a board member, hereby disclose that My employer

Or "Other"(describe): _____ could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB 20

Contractor Name & Address: Leslie Kristof, Keiser University, 9400 SW Discovery Way, Port St. Lucie, FL 34987

Contractor Contact Phone Number: 772-398-9990

Description or Nature of Contract: Occupational skills training from Eligible Training Provider

Description of Financial Benefit*: Financial gain to parent organization

For purposes of the above contract the following disclosures are made: The contractor's principals**/owners***: (check one)

☒ have no relative who is a member of the board or an employee of the board; OR
☐ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** ☒ is ☐ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee Print Name

Leslie Kristof
Print Name

Date

*"Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST ABSTAIN FROM VOTING DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.

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

LAST NAME – FIRST NAME – MIDDLE NAME Kristof, Leslie	NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE CareerSource Research Coast/LWDB 20
MAILING ADDRESS 9400 SW Discovery Way	THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
CITY Port St. Lucie	COUNTY St. Lucie
DATE ON WHICH VOTE OCCURRED June 25, 2025	NAME OF POLITICAL SUBDIVISION: MY POSITION IS <input type="checkbox"/> ELECTIVE <input checked="" 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, Leslie Kristof, hereby disclose that on June 25, 2025

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 Keiser University, 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.



CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, James Brann, hereby certify the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: CareerSource Research Coast/LWDB 20

Contractor Name & Address: Terrance Moore, Moore Solutions, Inc., 1680 SE Lyngate Dr., Ste. 202, Port St. Lucie, FL 34952

Contractor Contact Phone Number: 772-337-4005

Contract Number or Other Identifying Information, if any: n/a

Contract Term: PY 25-26

Value of the Contract with **no** extensions or renewals exercised: Under \$10,000

Value of the Contract with **all** extensions and renewals exercised: n/a

Description of goods and/or services to be procured: Worksite agreement for WIOA Youth Work Experience

Method of procurement for the goods and/or services to be procured: n/a

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: Terrance Moore

The nature of the conflicting interest in the contract: Financial gain to parent organization

The board member or employee with the conflict of interest _____ did _____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
- A draft copy of the related party contract and amendments, as applicable.
- Documentation supporting the method of procurement of the related party contract.
- A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann
Print Name

**Must be certified and attested to by the Board Chair*

Date



**DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT**

I, Terrance Moore, a board member, hereby disclose that My business

Or "Other"(describe): _____ could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB 20

Contractor Name & Address: CareerSource Research Coast/LWDB 20

Contractor Contact Phone Number: Terrance Moore, Moore Solutions, Inc., 1680 SE Lyngate Dr., Ste. 202, Port St. Lucie, FL 34952

Description or Nature of Contract: Worksite agreement for WIOA Youth Work Experience

Description of Financial Benefit*: Financial gain to parent organization

For purposes of the above contract the following disclosures are made: The contractor's principals**/owners***: (check one)

☒ have no relative who is a member of the board or an employee of the board; OR

☐ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** ☒ is ☐ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee Print Name

Terrance Moore
Print Name

Date

*"Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST ABSTAIN FROM VOTING DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.

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

LAST NAME – FIRST NAME – MIDDLE NAME Moore, Terrance	NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE CareerSource Research Coast/LWDB 20
MAILING ADDRESS 1680 SE Lyngate Dr., Ste. 202	THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
CITY Port St. Lucie	COUNTY St. Lucie
DATE ON WHICH VOTE OCCURRED June 25, 2025	NAME OF POLITICAL SUBDIVISION: MY POSITION IS <input type="checkbox"/> ELECTIVE <input checked="" 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, Terrance Moore, hereby disclose that on June 25, 2025

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 Moore Solutions, Inc., 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.



CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, Leslie Kristof, hereby certify the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: CareerSource Research Coast/LWDB 20

Contractor Name & Address: James Brann, The Porch Factory, 705 N 39th Street, Ft. Pierce, FL 34947

Contractor Contact Phone Number: 772-465-6772

Contract Number or Other Identifying Information, if any: n/a

Contract Term: PY 25-26

Value of the Contract with **no** extensions or renewals exercised: Under \$30,000

Value of the Contract with **all** extensions and renewals exercised: n/a

Description of goods and/or services to be procured: On the Job Training Contract

Method of procurement for the goods and/or services to be procured: n/a

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: James Brann

The nature of the conflicting interest in the contract: Financial gain to parent organization

The board member or employee with the conflict of interest _____ did _____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
- A draft copy of the related party contract and amendments, as applicable.
- Documentation supporting the method of procurement of the related party contract.
- A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

Leslie Kristof

Print Name

**Must be certified and attested to by the Board Chair*

Date



**DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT**

I, James Brann, a board member, hereby disclose that My business

Or "Other"(describe): _____ could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB 20

Contractor Name & Address: James Brann, The Porch Factory, 705 N 39th Street, Ft. Pierce, FL 34947

Contractor Contact Phone Number: 772-465-6772

Description or Nature of Contract: On the Job Training Contract

Description of Financial Benefit*: Financial gain to parent organization

For purposes of the above contract the following disclosures are made: The contractor's principals**/owners***: (check one)

☒ have no relative who is a member of the board or an employee of the board; OR

☐ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** ☒ is ☐ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee Print Name

James Brann

Print Name

Date

*"Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST ABSTAIN FROM VOTING DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.

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

LAST NAME – FIRST NAME – MIDDLE NAME Brann, James	NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE CareerSource Research Coast/LWDB 20
MAILING ADDRESS 705 N 39th Street	THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
CITY Fort Pierce	COUNTY St. Lucie
DATE ON WHICH VOTE OCCURRED June 25, 2025	NAME OF POLITICAL SUBDIVISION: MY POSITION IS <input type="checkbox"/> ELECTIVE <input checked="" 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, James Brann, hereby disclose that on June 25, 2025

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 The Porch Factory, 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.



CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, James Brann, hereby certify the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: CareerSource Research Coast/LWDB20

Contractor Name & Address: Kelly Johnson, R.V. Johnson Insurance, 2041 SE Ocean Blvd., Stuart, FL 34996

Contractor Contact Phone Number: 772-287-3366

Contract Number or Other Identifying Information, if any: n/a

Contract Term: PY25-26

Value of the Contract with **no** extensions or renewals exercised: Under \$10,000

Value of the Contract with **all** extensions and renewals exercised: n/a

Description of goods and/or services to be procured: On the Job Training Contract

Method of procurement for the goods and/or services to be procured: n/a

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: Kelly Johnson

The nature of the conflicting interest in the contract: Financial gain to parent organization

The board member or employee with the conflict of interest _____ did _____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
- A draft copy of the related party contract and amendments, as applicable.
- Documentation supporting the method of procurement of the related party contract.
- A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann

Print Name

**Must be certified and attested to by the Board Chair*

Date



**DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT**

I, Kelly Johnson, a board member, hereby disclose that My employer

Or "Other"(describe): _____ could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB20

Contractor Name & Address: Kelly Johnson, R.V. Johnson Insurance, 2041 SE Ocean Blvd., Stuart, FL 34996

Contractor Contact Phone Number: 772-287-3366

Description or Nature of Contract: On the Job Training Contract

Description of Financial Benefit*: Financial gain to parent organization

For purposes of the above contract the following disclosures are made: The contractor's principals**/owners***: (check one)

☒ have no relative who is a member of the board or an employee of the board; OR
☐ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** ☒ is ☐ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee Print Name

Kelly Johnson

Print Name

Date

*"Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST ABSTAIN FROM VOTING DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.

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

LAST NAME – FIRST NAME – MIDDLE NAME Johnson, Kelly	NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE CareerSource Research Coast/LWDB 20
MAILING ADDRESS 041 SE Ocean Blvd.	THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
CITY Stuart	COUNTY Martin
DATE ON WHICH VOTE OCCURRED June 25, 2025	NAME OF POLITICAL SUBDIVISION: MY POSITION IS <input type="checkbox"/> ELECTIVE <input checked="" 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, Kelly Johnson, hereby disclose that on June 25, 2025

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 R.V. Johnson Insurance, 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.



CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, James Brann, hereby certify the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: CareerSource Research Coast/LWDB20

Contractor Name & Address: Deborah Frazier, Treasure Coast Builders Association, 6560 US Highway 1, Port St. Lucie, FL 34952

Contractor Contact Phone Number: 772-336-8222

Contract Number or Other Identifying Information, if any: n/a

Contract Term: PY25-26

Value of the Contract with **no** extensions or renewals exercised: Under \$10,000

Value of the Contract with **all** extensions and renewals exercised: n/a

Description of goods and/or services to be procured: On the Job Training Contract

Method of procurement for the goods and/or services to be procured: n/a

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: Deborah Frazier

The nature of the conflicting interest in the contract: Financial gain to parent organization

The board member or employee with the conflict of interest _____ did _____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
- A draft copy of the related party contract and amendments, as applicable.
- Documentation supporting the method of procurement of the related party contract.
- A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann

Print Name

**Must be certified and attested to by the Board Chair*

Date



**DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT**

I, Deborah Frazier, a board member, hereby disclose that My employer

Or "Other"(describe): _____ could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB20

Contractor Name & Address: Deborah Frazier, Treasure Coast Builders Association, 6560 US Highway 1, Port St. Lucie, FL 34952

Contractor Contact Phone Number: 772-336-8222

Description or Nature of Contract: On the Job Training Contract

Description of Financial Benefit*: Financial gain to parent organization

For purposes of the above contract the following disclosures are made: The contractor's principals**/owners***: (check one)

☒ have no relative who is a member of the board or an employee of the board; OR

_____ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** ☒ is _____ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee Print Name

Deborah Frazier

Print Name

Date

*"Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST ABSTAIN FROM VOTING DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.

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

LAST NAME – FIRST NAME – MIDDLE NAME Frazier, Deborah	NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE CareerSource Research Coast/LWDB 20
MAILING ADDRESS 6560 US Highway 1, Port St. Lucie, FL 34952	THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
CITY Port St. Lucie	COUNTY St. Lucie
DATE ON WHICH VOTE OCCURRED June 25, 2025	NAME OF POLITICAL SUBDIVISION: MY POSITION IS <input type="checkbox"/> ELECTIVE <input checked="" 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, Deborah Frazier, hereby disclose that on June 25, 20: 25

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 Treasure Coast Builders Association, 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.



CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, James Brann, hereby certify the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: CareerSource Research Coast/LWDB 20

Contractor Name & Address: Dr. David Moore, School District of Indian River County/Treasure Coast Technical College, 6500 57th Street, Vero Beach, FL 32967

Contractor Contact Phone Number: 772-564-3150

Contract Number or Other Identifying Information, if any: n/a

Contract Term: PY 25-26

Value of the Contract with **no** extensions or renewals exercised: Under \$10,000

Value of the Contract with **all** extensions and renewals exercised: n/a

Description of goods and/or services to be procured: Facility Use Agreement for the Eckerd Connects Career Center

Method of procurement for the goods and/or services to be procured: n/a

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: Dr. David Moore

The nature of the conflicting interest in the contract: Financial gain to parent organization

The board member or employee with the conflict of interest _____ did _____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
- A draft copy of the related party contract and amendments, as applicable.
- Documentation supporting the method of procurement of the related party contract.
- A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann

Print Name

**Must be certified and attested to by the Board Chair*

Date



**DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT**

I, Dr. David Moore, a board member, hereby disclose that My employer

Or "Other"(describe): _____ could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB 20

Contractor Name & Address: Dr. David Moore, School District of Indian River County/Treasure Coast Technical College, 6500 57th Street, Vero Beach, FL 32967

Contractor Contact Phone Number: n/a

Description or Nature of Contract: Facility Use Agreement for the Eckerd Connects Career Center

Description of Financial Benefit*: Financial gain to parent organization

For purposes of the above contract the following disclosures are made: The contractor's principals**/owners***: (check one)

☒ have no relative who is a member of the board or an employee of the board; OR
☐ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** ☒ is ☐ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee Print Name

Dr. David Moore
Print Name

Date

*"Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST ABSTAIN FROM VOTING DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.



CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, James Brann, hereby certify the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: CareerSource Research Coast/LWDB 20

Contractor Name & Address: Christi Shields, School District of Indian River County/Treasure Coast Technical College, 6500 57th Street, Vero Beach, FL 32967

Contractor Contact Phone Number: 772-564-5006

Contract Number or Other Identifying Information, if any: n/a

Contract Term: PY 25-26

Value of the Contract with **no** extensions or renewals exercised: Under \$10,000

Value of the Contract with **all** extensions and renewals exercised: n/a

Description of goods and/or services to be procured: Facility Use Agreement for the Eckerd Connects Career Center

Method of procurement for the goods and/or services to be procured: n/a

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: Christi Shields

The nature of the conflicting interest in the contract: Financial gain to parent organization

The board member or employee with the conflict of interest _____ did _____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
- A draft copy of the related party contract and amendments, as applicable.
- Documentation supporting the method of procurement of the related party contract.
- A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann

Print Name

**Must be certified and attested to by the Board Chair*

Date



**DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT**

I, Christi Shields, a board member, hereby disclose that My employer

Or "Other"(describe): _____ could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB 20

Contractor Name & Address: Christi Shields, School District of Indian River County/Treasure Coast Technical College, 6500 57th Street, Vero Beach, FL 32967

Contractor Contact Phone Number: 772-564-5006

Description or Nature of Contract: Facility Use Agreement for the Eckerd Connects Career Center

Description of Financial Benefit*: Financial gain to parent organization

For purposes of the above contract the following disclosures are made: The contractor's principals**/owners***: (check one)

☒ have no relative who is a member of the board or an employee of the board; OR
☐ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** ☒ is ☐ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee Print Name

Christi Shields
Print Name

Date

*"Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST ABSTAIN FROM VOTING DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.

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

LAST NAME – FIRST NAME – MIDDLE NAME Shields, Christi	NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE CareerSource Research Coast/LWDB 20
MAILING ADDRESS 6500 57th Street	THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
CITY Vero Beach	COUNTY Indian River
DATE ON WHICH VOTE OCCURRED June 25, 2025	NAME OF POLITICAL SUBDIVISION: MY POSITION IS <input type="checkbox"/> ELECTIVE <input checked="" 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, Christie Shields, hereby disclose that on June 25, 2025

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 Treasure Coast Technical College, 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.



CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, James Brann, hereby certify the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: CareerSource Research Coast/LWDB 20

Contractor Name & Address: Dr. David Moore, School District of Indian River County/Treasure Coast Technical College, 6500 57th Street, Vero Beach, FL 32967

Contractor Contact Phone Number: 772-564-3150

Contract Number or Other Identifying Information, if any: n/a

Contract Term: PY 25-26

Value of the Contract with **no** extensions or renewals exercised: Under \$50,000

Value of the Contract with **all** extensions and renewals exercised: n/a

Description of goods and/or services to be procured: Occupational Skills Training from Eligible Training Provider

Method of procurement for the goods and/or services to be procured: n/a

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: Dr. David Moore

The nature of the conflicting interest in the contract: Financial gain to parent organization

The board member or employee with the conflict of interest ____ did ____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
- A draft copy of the related party contract and amendments, as applicable.
- Documentation supporting the method of procurement of the related party contract.
- A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann

Print Name

**Must be certified and attested to by the Board Chair*

Date



**DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT**

I, Dr. David Moore, a board member, hereby disclose that My employer

Or "Other"(describe): _____ could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB 20

Contractor Name & Address: Dr. David Moore, School District of Indian River County/Treasure Coast Technical College, 6500 57th Street, Vero Beach, FL 32967

Contractor Contact Phone Number: 772-564-3150

Description or Nature of Contract: Occupational skills training from Eligible Training Provider

Description of Financial Benefit*: Financial gain to parent organization

For purposes of the above contract the following disclosures are made: The contractor's principals**/owners***: (check one)

☒ have no relative who is a member of the board or an employee of the board; OR
☐ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** ☒ is ☐ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee Print Name

Dr. David Moore
Print Name

Date

*"Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST ABSTAIN FROM VOTING DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.



CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, James Brann, hereby certify the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: CareerSource Research Coast/LWDB 20

Contractor Name & Address: Christi Shields, School District of Indian River County/Treasure Coast Technical College, 6500 57th Street, Vero Beach, FL 32967

Contractor Contact Phone Number: 772-564-5006

Contract Number or Other Identifying Information, if any: n/a

Contract Term: PY 25-26

Value of the Contract with **no** extensions or renewals exercised: Under \$50,000

Value of the Contract with **all** extensions and renewals exercised: n/a

Description of goods and/or services to be procured: Occupational Skills Training from Eligible Training Provider

Method of procurement for the goods and/or services to be procured: n/a

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: Christ Shields

The nature of the conflicting interest in the contract: Financial gain to parent organization

The board member or employee with the conflict of interest _____ did _____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
- A draft copy of the related party contract and amendments, as applicable.
- Documentation supporting the method of procurement of the related party contract.
- A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann

Print Name

**Must be certified and attested to by the Board Chair*

Date



**DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT**

I, Christi Shields, a board member, hereby disclose that My employer

Or "Other"(describe): _____ could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB 20

Contractor Name & Address: Christi Shields, School District of Indian River County, /Treasure Coast Technical College, 6500 57th Street, Vero Beach, FL 32967

Contractor Contact Phone Number: 772-564-5006

Description or Nature of Contract: Occupational skills training from Eligible Training Provider

Description of Financial Benefit*: Financial gain to parent organization

For purposes of the above contract the following disclosures are made: The contractor's principals**/owners***: (check one)

☒ have no relative who is a member of the board or an employee of the board; OR
☐ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** ☒ is ☐ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee Print Name

Christi Shields
Print Name

Date

*"Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST ABSTAIN FROM VOTING DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.

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

LAST NAME – FIRST NAME – MIDDLE NAME Shields, Christi	NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE CareerSource Research Coast/LWDB 20
MAILING ADDRESS 6500 57th Street	THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
CITY Vero Beach	COUNTY Indian River
DATE ON WHICH VOTE OCCURRED June 25, 2025	NAME OF POLITICAL SUBDIVISION: MY POSITION IS <input type="checkbox"/> ELECTIVE <input checked="" 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, Christie Shields, hereby disclose that on June 25, 2025

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 Treasure Coast Technical College, 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.



CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, James Brann, hereby certify the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: CareerSource Research Coast/LWDB20

Contractor Name & Address: David Bean, Walmart Distribution Center 7038, 4001 S Jenkins Rd., Fort Pierce, FL 34981

Contractor Contact Phone Number: 772-46-4500 ext 624

Contract Number or Other Identifying Information, if any: n/a

Contract Term: PY25-26

Value of the Contract with **no** extensions or renewals exercised: Under \$10,000

Value of the Contract with **all** extensions and renewals exercised: n/a

Description of goods and/or services to be procured: On the Job Training Contract

Method of procurement for the goods and/or services to be procured: n/a

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: David Bean

The nature of the conflicting interest in the contract: Financial gain to parent organization

The board member or employee with the conflict of interest _____ did _____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
- A draft copy of the related party contract and amendments, as applicable.
- Documentation supporting the method of procurement of the related party contract.
- A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann
Print Name

**Must be certified and attested to by the Board Chair*

Date



**DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT**

I, David Bean, a board member, hereby disclose that My employer

Or "Other"(describe): _____ could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB20

Contractor Name & Address: David Bean, Walmart Distribution Center 7038, 4001 S Jenkins Rd., Fort Pierce, FL 34981

Contractor Contact Phone Number: 772-46-4500 ext 624

Description or Nature of Contract: On the Job Training Contract

Description of Financial Benefit*: Financial gain to parent organization

For purposes of the above contract the following disclosures are made: The contractor's principals**/owners***: (check one)

☒ have no relative who is a member of the board or an employee of the board; OR
☐ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** ☒ is ☐ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee Print Name

David Bean
Print Name

Date

*"Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST ABSTAIN FROM VOTING DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.

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

LAST NAME – FIRST NAME – MIDDLE NAME Bean, David		NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE CareerSource Research Coast/LWDB 20
MAILING ADDRESS 4001 S Jenkins Road		THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
CITY Ft. Pierce	COUNTY St ,Lucie	NAME OF POLITICAL SUBDIVISION:
DATE ON WHICH VOTE OCCURRED June 25, 2025		MY POSITION IS <input type="checkbox"/> ELECTIVE <input checked="" 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, David Bean, hereby disclose that on June 25, 2025

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 Walmart Distribution Center 7038, 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	Board/Committee Schedule - PY 2025 - 2026
Strategic Plans/Goals	N/A
Policy/Plan/Law	By-Laws of The Workforce Board of the Treasure Coast, Region 20
Action Requested	Review and Approve Board/Committee Schedule - PY 2025 - 2026
Background	Based on the required number of meetings for the Board of Directors stipulated in the by-laws, staff has prepared the meeting calendar for Program Year 2025 - 2026.
Staff Recommendations	Review and Approve Board/Committee Schedule
Supporting Material	Board/Committee Schedule - PY 2025-2026
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

Committee/Board Schedule

July '25						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

October '25						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

January '26						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

April '26						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

August '25						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

November '25						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

February '26						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

May '26						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

September '25						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

December '25						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

March '26						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

June '26						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

- Youth Council meets quarterly at 8:00am on the third Tuesday
- Programs & Services Committee meets quarterly at 8:00am on the last Wednesday (except November)
- Executive Committee meets monthly at 8:00am on the second Friday after the first Tuesday
- Board of Directors meets quarterly at 8:00am on the last Wednesday (Tentative)
- Workforce Readiness Taskforce meets quarterly on the first Thursday

Members will be notified of any changes in the above schedule. All meetings are held at the Workforce Board of the Treasure Coast, Inc., d/b/a CareerSource Research Coast Administrative Office, located at 4100 Okeechobee Road, Fort Pierce, Unit 90A. Questions, special needs, or special accommodations, please contact Jennifer Eimann at (866) 482-4473 x. 418 or via email at jeimann@careersourcerc.com.

AGENDA ITEM SUMMARY

Title	CSRC Paid Holidays & Compressed Work Schedule - PY 2025-2026
Strategic Plans/Goals	N/A
Policy/Plan/Law	DEO Grantee Subgrantee Agreement
Action Requested	Review and Approve CSRC Paid Holidays & Compressed Work Schedule for PY 2025-2026
Background	Per the DEO Grantee Subgrantee agreement, annually before July 1, the Board of Directors must approve the proposed office/staff work schedules to include paid holidays for the upcoming program year.
Staff Recommendations	Approve CSRC Paid Holidays & Compressed Work Schedule - PY 2025-2026
Supporting Material	Paid Holiday Schedule Memo/Compressed Work Schedule Link: https://careersourcerc.com/wp-content/uploads/2025/05/Compressed-Work-Schedule-PY25-26.pdf
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

APPROVED
By Brian Bauer at 12:59 pm, May 09, 2025

Memorandum

To: Brian K. Bauer

From: Jennifer Eimann

Re: PY25-26 Paid Holiday Schedule

Date: June 25, 2025

Of the standard working days in a year, twelve (12) of those days will be paid holidays and are scheduled to occur as listed below per the CareerSource Research Coast Employee Handbook:

- o Independence Day, Friday, July 04, 2025
- o Labor Day, Monday, September 01, 2025
- o Columbus Day, Monday, October 13, 2025
- o Veterans Day, Tuesday, November 11, 2025
- o Thanksgiving Day, Thursday, November 27, 2025
- o Thanksgiving Day (Obs.), Friday, November 28, 2025
- o Christmas Day, Thursday, December 25, 2025
- o Christmas Day (Obs.), Friday, December 26, 2025
- o New Year's Day, Thursday, January 1, 2026
- o New Year's Day (Obs.), Friday, January 2, 2026
- o Martin Luther King Day, Monday, January 19, 2026
- o Memorial Day, Monday, May 25, 2026

Accepted by Board Chair: _____

Date: _____

AGENDA ITEM SUMMARY

Title	Board of Directors Membership Re-Certification
Strategic Plans/Goals	Administration & Strategic Planning
Policy/Plan/Law	Inter-local Agreement
Action Requested	Information Only - Review Membership Re-Certification
Background	<p>Board Members shall be appointed for fixed and staggered terms and may serve until their successors are appointed. After the initial staggered terms, the terms of Workforce Development Board Members shall be four (4) years. Any vacancy in the membership of the Workforce Development Board shall be filled in the same manner as the original appointment. Members may be reappointed for successive terms if the sponsoring organization agrees. Any member of the Workforce Development Board may be removed for cause in accordance with procedures established by the Workforce Development Board.</p>
Staff Recommendations	<p>Review LWDB Membership Roster for PY 2025-2026</p> <ul style="list-style-type: none">• BU - Business• GRVRD - Government Representative-Vocational Rehabilitation• WOY - Workforce Community-Based Organization Representing Youth• EPTC - Education and Training Provider-Institute of Higher Learning• WOV - Workforce Community-Based Organization Representing Veterans• GRO - Government Representative• GRED - Government Representative Economic Development
Supporting Material	LWDB Membership Roster PY 2025-2026
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (800) 482-4473 ext. 418</p>

LOCAL WORKFORCE DEVELOPMENT BOARD (LWDB) MEMBERSHIP - CareerSource Research Coast 20

Total Number of Board Members: 24/24

Date Form Completed: 06/26/24

MEMBER NAME	AREA(S) OF REPRESENTATION	NOMINATING ORGANIZATION	DEMOGRAPHICS			ORIGINAL APPOINTMENT	PERIOD OF APPOINTMENT	RENEWAL DATE	TERM LIMIT
Werner Bols	BU - Business	Bols Construction	Male	White (not Hispanic)	Veteran	07/01/83	07/01/22 06/30/26	07/01/26	06/30/30
Pamela Burchell	BU - Business	Pamela Burchell Consulting	Female	White (not Hispanic)	Older Individual	01/28/08	07/01/23 06/30/27	07/01/27	06/30/31
Vacant (H. Caseltine)	BU - Business						07/01/25 06/30/29	07/01/29	06/30/33
Robert Cenk	BU - Business	Ce. Ce. Contracting	Male	White (not Hispanic)	Older Individual	09/28/15	07/01/24 06/30/28	07/01/28	06/30/32
Wayne Olson	GRVRD - Government Representative-VR	DOE - Vocational Rehabilitation	Male	White (not Hispanic)	Older Individual	09/01/11	07/01/23 06/30/27	07/01/27	n/a
William Armstead	BU - Business WOY - Workforce-Community-Based Organization Representing Youth	Boys & Girls Club of St. Lucie County	Male	Black/ African American (not Hispanic)	Veteran	07/01/23	07/01/23 06/30/27	07/01/27	06/30/31
Dr. Timothy Moore	WOY - Workforce-Community-Based Organization Representing Youth ETPC - Education and Training Provider - Higher Ed.	Indian River State College	Male	White (not Hispanic)	Older Individual	08/01/20	07/01/23 06/30/27	07/01/27	n/a
Michael Kauffmann	WOLO - Workforce-Labor Organization WOJ - Workforce-Joint Labor Mgmt. Apprenticeship Program	Local 402 Ironworkers	Male	White (not Hispanic)	n/a	07/01/22	07/01/22 06/30/26	07/01/26	n/a
Terrance Moore	BU - Business	Moore Solutions, Inc.	Male	Black/ African American (not Hispanic)	Older Individual	07/01/12	07/01/24 06/30/28	07/01/28	06/30/32
Lorna Landherr	BU - Business	Cleveland Clinic Indian River Hospital	Female	White (not Hispanic)	n/a	07/01/23	07/01/23 06/30/27	07/01/27	06/30/31
Dr. Jonathan Prince	WOY - Workforce-Community-Based Organization Representing Youth WOJ - Workforce-Joint Labor Mgmt. Apprenticeship Program	St. Lucie Public Schools	Male	White (not Hispanic)	n/a	07/01/22	07/01/22 06/30/26	07/01/26	n/a
David Freeland	WOLO - Workforce-Labor Organization	SLC Classroom Teachers'	Male	White (not Hispanic)	n/a	04/01/18	07/01/24 06/30/28	07/01/28	n/a
Jose Capellan	WOV - Workforce-Community-Based Organization Representing Veterans GRO - Government Rep-Other	SLC Veteran Services	Male	White and Hispanic	Veteran	11/01/20	07/01/23 06/30/27	07/01/27	n/a
Vacant (P. Tesch)	BU - Business						07/01/25 06/30/29	07/01/29	06/30/33
Erin Lowry	GRO - Government Representative-Other	SLC Board of County Commissioners	Female	White (not Hispanic)	n/a	12/01/22	12/01/24 11/30/25	12/01/25	n/a
Deborah Frazier	BU - Business	Treasure Coast Builders Association	Female	White (not Hispanic)	n/a	07/01/24	07/01/24 06/30/28	07/01/28	06/30/32

Dr. David Moore	WOY - Workforce-Community Based Organizations Representing Youth ETPA-Education & Training Provider	Indian River County School District	Male	White (not Hispanic)	Veteran	07/01/16	07/01/24 06/30/28	07/01/28	n/a
Leslie Kristof	BU - Business ETPC - Education and Training Provider - Higher Ed.	Keiser University	Female	White (not Hispanic)	n/a	07/26/18	07/01/24 06/30/28	07/01/28	06/30/32
Joe Catrambone	BU - Business	MC Chamber of Commerce	Male	White (not Hispanic)	n/a	07/01/25	07/01/25 06/30/26	07/01/27	06/30/31
Kevin Staten	BU - Business	Bank of America	Male	White (not Hispanic)	n/a	07/01/23	07/01/23 06/30/27	07/01/27	06/30/31
James Brann	BU - Business	The Porch Factory	Male	White (not Hispanic)	n/a	03/01/20	07/01/23 06/30/27	07/01/27	06/30/31
Michael Maine	Organization Representing Youth ETPA - Education and Training Provider - Adult Ed.	Martin County School District	Male	White (not Hispanic)	n/a	07/01/23	07/01/23 06/30/27	07/01/27	n/a
Kelly Johnson	BU - Business	R.V. Johnson Insurance	Female	White (not Hispanic)	n/a	07/01/24	07/01/24 07/01/28	07/01/28	06/30/32
David Bean	BU - Business	Walmart Distribution Center	Male	White (not Hispanic)	n/a	07/01/24	07/01/24 07/01/28	07/01/28	06/30/32

Agenda Item 16

AGENDA ITEM SUMMARY

Title	CareerSource Research Coast (CSRC) Updates
Strategic Plans/Goals	Strategic Planning, Commitments, and Projects
Policy/Plan/Law	Workforce Development Board of the Treasure Coast By-Laws
Action Requested	None - Information only
Background	<p>The primary functions of the Executive Committee shall be to coordinate workforce development activities with regional economic development strategies and increase accountability by assuring that education and workforce development activities in the area are effective and relevant to current and future labor market needs.</p> <p>Staff will provide updates on CSRC programs and current initiatives to the Executive Committee members.</p>
Staff Recommendations	None - Information Only
Supporting Material	None - Information Only
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418