



Board of Directors

MEETING AGENDA

Meeting Details

Date: Wednesday, Sept. 24, 2025
Time: 8:00 am
Location: 4100 Okeechobee Road,
Fort Pierce, Florida 34947, Unit 90A

MSTeams Virtual Meeting Access:

Access Code: 978 961 016#
Phone: 772-800-5467
URL: [Join the meeting now](#)

Opening Remarks

1. Welcome & Call to Order
2. Pledge of Allegiance
3. Roll Call and Attendance (Page 3)
 - a. Board Members
 - b. Staff
4. Conflict of Interest Declaration (Pages 4-6)

Voting Items

5. Consent Agenda (Pages 7-109)
 - a. Review and Approve June 25, 2025, Board of Directors Meeting Minutes
 - b. Review and Approve July 15, 2025, Youth Council Meeting Minutes
 - c. Review and Approve August 27, 2025, Program and Services Meeting Minutes
 - d. Review and September 12, 2025, Executive Committee Meeting Minutes
 - I. Review and Approve Financial Statements - May, June, July 2025
 - II. Review and Approve Review and Approve Welfare Transition (WT) - Transitional Supportive Services Policy
 - III. Review and Approve Welfare Transition (WT) - Up-Front Diversion Policy
 - IV. Review and Approve Welfare Transition (WT) - Work Requirement Penalties and Pre-Penalty Counseling Policy
 - V. Review and Approve Welfare Transition (WT) - Hardship Extensions for Temporary Cash Assistance Policy
 - VI. Review and Approve Reemployment Services and Eligibility Assessment (RESEA) - Program Design and Framework Policy
 - VII. Review and Approve Workforce Innovation & Opportunity Act (WIOA) - Program Framework and Design Policy
6. Review and Approve Final Budget - PY 2025-2026 (Pages 110-117)
7. Review and Approve Workforce Innovation & Opportunity Act (WIOA) - Youth Services Subrecipient Contract for PY2025-2026 (RFP Term 5 of 5) (Page 118)

8. Review and Approve Local Targeted Occupations List (LTOL) for 2nd Quarter - PY2025-2026 (Pages 119-123)
9. Review and Approve Declaration of Authority - Angela Browning, Designee for Timothy Moore, President, Indian River State College (Pages 124-125)
10. Review and Approve the Executive Committee's Recommendation for Executive Staff Salary Compensation (Pages 126-127)

Information/Discussion

11. Primary Indicators of Performance - 4th Quarter (Pages 128-129)
12. Department of Commerce (FLORIDACOMMERCE) Financial and Programmatic Compliance Monitoring Review - PY 2024-2025 (Page 130)
13. Chair's Report (Page 131)
 - a. Board of Directors Orientation
 - b. Ad Hoc Search Committee - Board Membership
14. President's Report (Page 132)
 - CareerSource Research Coast Reorganization/Reach Office Update
 - Workforce Development Professional Summit - September 8-10, 2025
 - Lippes Mathias LLP General Counsel - Engagement Letter
 - Port St. Lucie Business Center Lease Settlement
15. Open to the Public (Page 133)
16. Open to the Board (Page 134)
17. Adjournment - Next Board of Directors Meeting - January 28, 2025

**BOARD OF DIRECTORS MEETING
AGENDA
ATTENDANCE ROSTER
JULY 1, 2025 - JUNE 30, 2026**

#	BOARD MEMBER		09/24	01/28	04/29	06/24	Total
1	Werner	Bols					
2	Jim	Brann - Chair					
3	Pamela	Burchell					
4	Jose	Capellan					
5	Joseph	Catrambone					
6	Bob	Cenk					
7	Erin	Lowry					
8	David	Freeland					
9	Jon Aliesha	Prince Seitz (Designee)					
10	Mike	Kauffmann					
11	Leslie	Kristof - Past Chair					
12	Michael Tracey	Maine Miller (Designee)					
13	Dr. Tim Angela	Moore Browning (Designee)					
14	Terrance	Moore					
15	Dr. David Christie	Moore Shields (Designee) Treasurer					
16	Wayne	Olson					
17	Lorna	Landherr					
18	Will	Armstead - Vice Chair					
19	Kevin	Staten					
20	Kelly	Johnson					
21	Deb	Frazier					
#	ADMINISTRATIVE STAFF		09/24	01/28	04/29	06/24	Total
1	Brian	Bauer					
2	Tracey	McMorris					
3	Lisa	Delligatti					
4	Shelly	Batton					
5	Martin	Rivera/IT Dept					
5	Jennifer	Eimann					

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

Agenda Item 4

AGENDA ITEM SUMMARY

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

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

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

WHO MUST FILE FORM 8B

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

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

INSTRUCTIONS FOR COMPLIANCE WITH SECTION 112.3143, FLORIDA STATUTES

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

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

* * * * *

ELECTED OFFICERS:

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

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

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

* * * * *

APPOINTED OFFICERS:

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

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

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

APPOINTED OFFICERS (continued)

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

DISCLOSURE OF LOCAL OFFICER'S INTEREST

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

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

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

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

Date Filed

Signature

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

AGENDA ITEM SUMMARY

Title	Consent Agenda
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Board By-Laws
Action Requested	Approve Consent Agenda, as presented
Background	<p>Consent Agenda</p> <ul style="list-style-type: none"> a. Review and Approve June 25, 2025, Board of Directors Meeting Minutes b. Review and Approve July 15, 2025, Youth Council Meeting Minutes c. Review and Approve August 27, 2025, Program and Services Meeting Minutes d. Review and September 12, 2025, Executive Committee Meeting Minutes <ul style="list-style-type: none"> I. Review and Approve Financial Statements - May, June, July 2025 II. Review and Approve Review and Approve Welfare Transition (WT) - Transitional Supportive Services Policy III. Review and Approve Welfare Transition (WT) - Up-Front Diversion Policy IV. Review and Approve Welfare Transition (WT) - Work Requirement Penalties and Pre-Penalty Counseling Policy V. Review and Approve Welfare Transition (WT) - Hardship Extensions for Temporary Cash Assistance Policy VI. Review and Approve Reemployment Services and Eligibility Assessment (RESEA) - Program Design and Framework Policy VII. Review and Approve Workforce Innovation & Opportunity Act (WIOA) - Program Framework and Design Policy
Staff Recommendation	Review and Approve Consent Agenda Items, as presented
Supporting Material	Draft Policies
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

Agenda Item 5a Board of Directors Meeting Minutes

June 25, 2025

Meeting Agenda

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

Voting Items

6. Consent Agenda
 - a. Review and Approve May 21, 2025, Program and Services Meeting Minutes
 - b. Review and Approve May 28, 2025, Board of Directors Meeting Minutes
 - c. Review and Approve June 13, 2025, Executive Committee Meeting Minutes
 - I. Review and Approve Financial Statements - April 2025
 - II. Review and Approve Jobs for Veterans State Grants (JVSG) - Employment and Advocacy Services Policy Revisions
 - III. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - On-the-Job Training Program Policy Revisions
 - IV. Review and Approve Wagner Peyser (WP) - Job Orders and Placements Policy Revisions
 - V. Review and Approve Wagner Peyser (WP) - Job Seeker Registration, Application, and Services Policy Revisions
 - VI. Review and Approve Renewable Vendor Contracts - PY2025-2026
 - Manpower
 - Taylor, Hall, Miller, Parker (THMP)
 - Lippes Mathias, Attorneys at Law - Employment
 - James Moore, CPA
 - VII. Review and Approve Board and Committee Schedule - PY2025- 2026
 - VIII. Review and Approve CSRC Paid Holidays Memo and Compressed Work Schedule - PY2025-2026

7. Review & Approve Workforce Innovation and Opportunity Act (WIOA) - Individual Training Account (ITA) Policy Revisions
8. Local Targeted Occupations List (LTOL) for 1st Quarter - PY2025-2026
9. Review and Approve Draft Budget - PY 2025-2026
10. Review and Approve Individual Training Account (ITA) Waiver Request - PY2025- 2026
11. Review and Approve NDWG Employer of Record (EOR) Contract - PY2025-2026
12. Review and Approve Risk Evaluation Form Subrecipient Services - WIOA Youth Services Contract Renewal - PY2025-2026
13. Review and Approve Risk Evaluation Form Subrecipient Services - Workforce Coordination Consulting OSO Contract Renewal - PY2025-2026
14. Review and Approve Board Member Contract/COI Exemption Requests - PY2025-2026

Information/Discussion

15. Workforce Readiness Taskforce Quarterly Report
16. Chair's Report
 - a. Workforce Innovation Opportunity Act (WIOA) Presentation
17. President's Report
 - a. CareerSource Research Coast Administrative Plan Update - PY2025-2026
 - b. Board of Directors Membership Recertification - PY2025-2026
 - c. Appointment of Directors Nominated to the Workforce Development Board of the Treasure Coast
 - d. CareerSource Research Coast Consolidation/Reorganization Update
18. Open to the Board
19. Open to the Public
20. Adjournment - Next Meeting September 24, 2025

Members Present

Leslie Kristof	Jim Brann	Deb Frazier
Werner Bols	Bob Cenk	Aliesha Seitz
Prasanth Pilly	William Armstead	Kelly Johnson

Members Participating by Teleconference

Jose Capellan	Lorna Landherr	Christie Shields
Tracey Miller	Terrance Moore	Wayne Olson
Wayne Olson		

Members Excused

Tracey Miller	Michael Kauffmann	Erin Lowry
David Freeland	David Bean	Kevin Staten
Pete Tesch	Terissa Aronson	

Public in Attendance

Michelle Miller

Administrative Staff Participating In-person/Teleconference

Brian Bauer	Tracey McMorris	Shelly Batton
Christina Coble	Jennifer Eimann	

Call to Order

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

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

Jim Brann, Chair, asked board members to identify any potential conflicts of interest related to the agenda, excluding Agenda Item 14 - Board Member Contract/COI Exemption Requests. No conflicts of interest were declared.

Agenda Item 5 - Installation of Officers - Michelle Miller, Clerk of Court, St. Lucie County:

Brian Bauer, President/CEO, stated that the Board's By-Laws state that the Chairperson, Vice Chairperson, and Treasurer shall be appointed annually by the Board and shall serve a one (1) year term commencing July 1. The Chairperson's and the Vice Chairperson's terms shall be limited to two (2) consecutive one (1) year terms, and the Treasurer shall be limited to four (4) consecutive one (1) year terms. There are no limitations on the number of terms in sequence or in different offices.

The Slate of Officers presented for Installation by Michelle Miller, Clerk of Court, St. Lucie County, consisted of James Brann for Chair, William Armstead for Vice Chair, and Christi Shields for Treasurer. All were sworn in.

Mr. Bauer presented the slate of officers of the Workforce Development Board of the Treasure Coast for the 2025 - 2026 Program Year.

Agenda Item 6 - Consent Agenda:

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

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

Agenda Item 7 - Review & Approve Workforce Innovation and Opportunity Act (WIOA) - Individual Training Account (ITA) Policy Revisions:

Brian Bauer, President/CEO, explained that revisions to the ITA Training Account Policy were made to align with the state-driven Local Targeted Occupation List (LTOL) requirements. Entry wages were adjusted to match LTOL standards, which clearly distinguish between high-wage and average occupations. Additionally, the service delivery area expanded beyond the original three counties to include Palm Beach County as part of joining a Regional Planning Area (RPA) with southern neighbors.

Changes reflect that Career planners will now conduct objective assessments for all program participants. These comprehensive, in-depth evaluations will identify individual barriers, needs, and financial requirements, ensuring alignment with other regional programs and improving service consistency across all four counties.

Based on annual policy review and budget considerations, maximum ITA investments were reduced from previous levels:

- **Tier 1 occupations:** Decreased from \$10,000 to \$7,500 maximum
- **Tier 2 occupations:** Decreased from \$15,000 to \$10,000 maximum

These reductions address budget management concerns, as the organization exceeded its 40% ITA waiver target, reaching 45-46% at certain points during the year.

In addition, entry wage thresholds were updated to reflect Florida's increasing minimum wage:

- **Tier 1:** Increased - \$15.00 to \$17.26/hour
- **Tier 2:** Increased - \$17.27/hour

Mr. Bauer stated that these policy modifications aim to serve more individuals while maintaining fiscal responsibility, improve alignment with targeted occupation outcomes, and enhance coordination within the four-county regional partnership. The changes balance investment levels with service capacity to maximize program effectiveness.

A motion was made by Werner Bols to approve the Workforce Innovation and Opportunity Act (WIOA) - Individual Training Account (ITA) Policy Revisions, as presented. Deb Frazier seconded the motion. The motion passed unanimously.

Agenda Item 8 - Review and Approve Local Targeted Occupations List (LTOL) for the 1st Quarter of PY 2024-2025:

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

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

Staff reviewed local labor market information and resources regarding LTOL. One occupation, Team Assemblers, is recommended to be added, and eleven occupations, Business Teachers, Postsecondary, Captains, Mates, and Pilots of Water Vessels, Career/Technical Education Teachers, Postsecondary, Clergy, Education Administrators, Kindergarten through Secondary, Education Administrators, Postsecondary, Electrical and Electronic Engineering Technologists and Technicians, First-Line Supervisors of Housekeeping and Janitorial Workers, Pest Control Workers, Physician Assistants, and Postsecondary Teachers, All Other, are recommended to be removed from the CSRC PY 2025-2026 LTOL for the 1st Quarter of the PY 2025-2026 list.

Staff recommends approval of this LTOL for the 1st Quarter of PY 2025-2026.

A motion was made by Prasanth Pilly to approve the Local Targeted Occupations List for the 1st Quarter of PY 25-26, as presented. Werner Bols seconded the motion, which passed unanimously.

Agenda Item 9 - Review and Approve Draft Budget - PY 2025-2026:

Brian Bauer, President/CEO, presented the Draft Budget for PY 2025-2026:

Facility Costs

The budget reflects significant changes in rental expenses

- Primary Location:** Garden City facility
- New Facility:** Additional rent included for new space preparation
- Extended Commitment:** Five-year additional rent totaling \$189,000 to offset space preparation costs
- Expansion:** Three new locations at Indian River State College campuses

Staffing and Payroll

The budget accounts for all current staff positions

- Notable Change:** Finance department accountant position removed following anticipated resignation
- Cost Reduction:** Salaries and benefits decreased by approximately \$235,000 compared to PY 24-25

•**Indirect Rate:** Currently running at 27%, expected to decrease in the new program year due to fewer staff charging to indirect costs

A motion was made by Leslie Kristof to approve the Draft Budget - PY 2025-2026, as presented. Christi Shields seconded the motion. The motion passed unanimously.

Agenda Item 10 - Review and Approve Individual Training Account (ITA) Waiver Request - PY2025-2026:

Brian Bauer, President/CEO, explained that FLORIDACOMMERCE mandates that workforce boards allocate 50% of their training budget directly to training expenses, including books, fees, and tuition. However, boards can request a waiver to reduce this percentage requirement.

The board is requesting a 40% waiver for this year, representing a significant reduction from the standard 50% requirement.

Mr. Bauer emphasized the significance of this waiver in maintaining operational flexibility and meeting client needs, while also highlighting the challenges presented by state funding policies. He also mentioned potential partnerships with the Promise program to enhance eligibility screening for clients.

A motion was made by Prasanth Pilly to approve the Individual Training Account (ITA) Waiver Request -PY2025-2026, as presented. Deb Frazier seconded the motion. The motion passed unanimously.

Agenda Item 11 - Review and Approve RFP 25-001-NDWG - Employer of Record (EOR):

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

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

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

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

A motion was made by Werner Bols to approve the RFP 25-001-NDWG - Employer of Record (EOR), as presented. Prasanth Pilly seconded the motion. The motion passed unanimously.

Agenda Item 12 - Review and Approve Risk Evaluation Form Subrecipient Services - WIOA Youth Services Contract Renewal - PY 2025-2026:

Brian Bauer, President and CEO, discussed how staff present contracts to the board and executive committee each year for performance-based approval. The Eckerd Youth WIOA Youth contract requires additional documentation due to its sub-recipient status, necessitating comprehensive performance data to demonstrate contract compliance and deliverable achievement.

The Risk Evaluation Forms provide evidence of Eckerd Youth's favorable performance during the 2024-25 contract period. This performance data supports our recommendation for board and committee approval of the 2025-26 annual contract renewal.

A motion was made by Leslie Kristof to approve the Risk Evaluation Form Subrecipient Services - WIOA Youth Services Contract Renewal - PY 2025-2026, as presented. Kelly Johnson seconded the motion. The motion passed unanimously.

Agenda Item 13 - Review and Approve Risk Evaluation Form Subrecipient Services Workforce Coordination Consulting OSO Contract PY2024-2025:

Brian Bauer, President/CEO, stated that based on the financial and programmatic risk evaluation forms for subrecipient services from our one-stop operator, Workforce Coordination Consulting, LLC., is being recommended for renewal for PY 2025-2026.

A motion was made by Prasanth Pilly to approve the Risk Evaluation Form Subrecipient Services - Workforce Coordination Consulting OSO Contract - PY2024-2025, as presented. Leslie Kristof seconded the motion, which passed unanimously.

Agenda Item 14 - Review and Approve Renewable 2025- 2026:

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

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

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

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

A motion was made by Werner Bols and seconded by Kelly Johnson to approve any/all potential OJT contracts as stated in the OJT agreement with Cleveland Clinic Indian River, not to exceed \$100,000. The motion was passed with board member Lorna Landherr abstaining.

A motion was made by Leslie Kristof and seconded by Werner Bols to approve any/all potential student training vouchers as stated in the training provider agreement with Indian River State College, not to exceed \$125,000. The motion was passed with Dr. Prasanth Pilly, Designee, abstaining, and board member Dr. Timothy Moore completing a Disclosure and Certification of Conflict of Interest in a Contract, as he did not attend the meeting.

A motion was made by Leslie Kristof and seconded by Deb Frazier to approve the facilities use agreement/contract with Indian River State College, not to exceed \$10,000. The motion was passed with Dr. Prasanth Pilly, Designee, abstaining, and board member Dr. Timothy Moore completing a Disclosure and Certification of Conflict of Interest in a Contract, as he did not attend the meeting.

A motion was made by William Armstead and seconded by Bob Cenk to approve any/all potential student training vouchers as stated in the training provider agreement with Keiser University, not to exceed \$125,000. The motion was passed with board member Leslie Kristof abstaining.

A motion was made by Dr. Prasanth Pilly and seconded by Deb Frazier to approve the worksite agreement/contract with Moore Solutions, Inc., not to exceed \$10,000. The motion was passed with board member Terrance Moore abstaining.

A motion was made by Kelly Johnson and seconded by Dr. Prasanth Pilly to approve any/all potential OJT contracts as stated in the OJT agreement with The Porch Factory, not to exceed \$30,000. The motion was passed with board member Jim Brann abstaining.

A motion was made by Werner Bols and seconded by Deb Frazier to approve any/all potential OJT contracts as stated in the OJT agreement with RV Johnson Insurance, not to exceed \$10,000. The motion was passed with board member Kelly Johnson abstaining.

A motion was made by Dr. Prasanth Pilly and seconded by Terrance Moore to approve any/all potential OJT contracts as stated in the OJT agreement with Treasure Coast Builders Association, not to exceed \$10,000. The motion was passed with board member Deb Frazier abstaining.

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

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

A motion was made by William Armstead and seconded by Werner Bols to approve any/all potential OJT contracts as stated in the OJT agreement with Walmart Distribution Center 7038, not to exceed \$10,000. The motion was passed with board member David Bean completing a Disclosure and Certification of Conflict of Interest in a Contract, as he did not attend the meeting.

Agenda Item 15 - Workforce Readiness Taskforce Quarterly Report:

Christina Coble, Business Services Manager, stated that a panel discussion took place at the June 5, 2025 meeting. She explained that manufacturing on the Treasure Coast represents a critical economic driver with exceptional growth potential. The sector offers competitive wages and career advancement opportunities, with projected growth rates nearly three times the national average. This positions manufacturing as a premier pathway for regional workforce development initiatives.

The panel concluded that the Treasure Coast manufacturing sector stands at a critical juncture. While facing significant workforce challenges, the region demonstrates strong collaborative potential between industry, education, and community organizations. Success requires sustained commitment to addressing both immediate skill gaps and long-term talent development strategies. The sector's growth potential, combined with emerging partnerships and innovative programs, positions the region for manufacturing workforce development success.

Agenda Item 16 - Chair's Report:

Jim Brann, Chair, introduced Christina Coble and Shelly Batton, who presented a PowerPoint on WIOA and Business Services.

Director of Programs, Shelly Batton, and Business Services Manager, Christina Coble, presented an overview of the Workforce Innovation and Opportunity Act (WIOA) and Business Services provided by CSRC staff. This presentation provided more detailed information to all Board members, so they can communicate these services more confidently within the community.

Agenda Item 17 - President's Report:

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

Board of Directors Membership Recertification - PY2025-2026 - Mr. Bauer discussed board membership status, indicating one open seat following Helen Caseltine's retirement. Additionally, Pete Tesch has submitted his letter of resignation effective June 30, 2025. Mr. Bauer stated that further discussions and inquiries will be necessary to determine viable candidates to fill the seats.

Appointment of Directors Nominated to the Workforce Development Board of the Treasure Coast: Mr. Bauer explained that on June 13, 2023, the Treasure Coast Workforce Consortium approved the appointment of a Business Member (BU) seat to the CareerSource Research Coast Board of Directors. This position is designated for local Chambers of Commerce representing the three counties served by the organization. The seat will rotate annually among the three primary chambers, with terms running from July 1 through June 30.

Joseph Catrambone, Stuart/Martin Chamber of Commerce, was appointed for the period of July 1, 2025, to June 30, 2026.

Agenda Item 18 - Open to the Board:

No comments

Agenda Item 19 - Open to the Public:

No Comments

Agenda 20 - Adjournment:

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

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

STAFF CERTIFICATION

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

Brian Bauer
Board Staff

Date



Agenda Item 5b Youth Council Meeting Minutes

July 15, 2025

Opening Remarks

1. Welcome & Attendance

Voting Items

2. Review and Approve the Acceptance of Workforce Innovation Opportunity Act (WIOA) - Subrecipient Services - Youth Services Contract Renewal - PY 2025-2026

Information/Discussion

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

Members Participating by Teleconference:

Aliesha Seitz, Christie Shields, Lana Barros, Robert McPartlan, Freddie Woolfork

Members Present

None - Teleconference Only

Members Excused

Deb Frazier, Prashanth Pilly, Terrance Moore, Lorna Landherr, William Armstead, David Freeland

Members Unexcused

None

Staff Participating by Teleconference

Shelly Batton, Kate Sayger, Angie Stickland, Jennifer Eimann

Call to Order

Terrance Moore, Chair, was not available to attend the meeting. Shelly Batton, Director of Programs, called the meeting to order at 8:04 am.

Agenda Item 2 - Review and Approve the Acceptance of the Workforce Innovation Opportunity Act (WIOA) - Subrecipient Services - Youth Services Contract Renewal - PY 2025-2026:

Shelly Batton, Director of Programs, presented the following information regarding the Youth Services contract renewal.

Contract Overview

Staff recommends renewing Eckerd's youth services contract with modifications to funding and service targets based on current budget allocations.

Key Changes from the Previous Year

- **Funding reduction:** Contract amount decreased from \$800,000 to \$750,000 due to budget constraints
- **Service capacity adjusted:** Total youth served reduced proportionally based on available funding

Current Year Service Targets

Eckerd will serve **206 total youth** through the following breakdown:

- 79 carryover participants from the current program year
- 60 new enrollments (45 out-of-school youth + 15 in-school youth)
- 67 follow-up participants

Ms. Batton requested committee support to advance the youth contract to the Programs and Services Committee for review and approval in August. While not requiring a formal vote today, staff seeks endorsement to proceed with the contract renewal process.

Robert McPartlan moved to approve the acceptance of the Workforce Innovation Opportunity Act (WIOA) - Subrecipient Services - Youth Services Contract Renewal for PY 2025-2026. Christi Shields seconded the motion.

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

Shelly Batton, Director of Programs, presented the Primary Indicators of Performance for the 3rd Quarter of PY 2024- 2025. Ms. Batton explained that the areas highlighted in blue reflect those performance goals exceeded (greater than 100% of negotiated). Likewise, goals highlighted in green show that performance goals were met (90-100% of negotiated), and those reflected in yellow still need to be met (less than 90% of negotiated) by CSRC.

Ms. Batton noted the 3rd quarter performance results, which cover the period from January through March, and that performance reporting is significantly delayed. We typically don't receive fourth quarter results until late August or early September.

She reviewed the youth program results, which show that all indicators are blue, representing exceptional performance. This means our youth programs have not only met but exceeded every performance goal for the third quarter.

Ms. Batton stated that this outstanding achievement across all five indicators demonstrates the effectiveness of our programs and the dedication of our staff and community partners.

Agenda Item 4 - Workforce Innovation Opportunity Act (WIOA) Youth - Internal Performance Report - 4th Quarter PY 2024-2025:

Angie Strickland, Program Manager, presented the WIOA Youth Connections Performance Report for the 4th quarter PY 2024-2025.

Ms. Strickland shared the following performance measures:

- Out of School Youth (OSY) Enrollments - On Track - Goal 53 Participants - YTD 53 OSY Enrollments
- In-School Youth (ISY) Enrollments - On Track - Goal 17 Participants - YTD 17 ISY Enrollments
- Total Number of Enrollments - On Track - Goal 70 Participants - YTD 70 Enrollments
- % ISY Enrollments – Needs Improvement - Goal 25% - YTD 24.3% ISY Enrollments
- Work Experience (W/Ex) Internship Placements - YTD 49 Internship Placements
- W/Ex Successful Internship Completions - YTD 44 Successful Internship Completions
- W/Ex Internship Completion Percentage - YTD 89.8% Internship Completion Percentage
- W/Ex Expenditures - On Track - Goal \$222,735.00 - YTD \$221,401.10

Ms. Strickland expressed gratitude for the outstanding teamwork and partnerships that made success possible.

Agenda Item 5 - Summer of Success (SOS) Update:

Shelly Batton, Director of Programs, provided information on the Summer of Success Program. St. Lucie County provided valuable work experience for youth ages 16-20. From 93 initial applicants, 90 were interviewed (three did not respond to contact attempts), and 40 participants were ultimately selected based on available budget capacity.

The program structure included a comprehensive one-week "Florida Ready to Work" classroom training focusing on soft skills development. Participants who completed this training received a \$50 gift card and advanced to four-week internships with local employers.

- Participants worked 32 hours per week at \$15 per hour
- 8 employer partners provided 26 different worksites
- Placements matched participants' areas of interest as closely as possible
- All participants successfully completed their internships
- Program concluded on approximately July 11th

The program represents another successful year for the Summer of Success initiative, with Christina Coble, Business Services Manager, working diligently to ensure the program's success.

Ms. Batton explained that Martin County is showing interest in the program, and Kelly Johnson of RV Johnson Insurance is working diligently to coordinate resources and funding for participation in SOS for PY 2025-2026.

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

Shelly Batton, Director of Programs, explained that the TANF (Temporary Assistance for Needy Families) Summer Youth Program supports TANF Purpose 3 – Reducing the Incidence of Out-of-Wedlock Pregnancies, and each summer, when funding permits, we partner with local organizations that focus on teen pregnancy prevention.

This year, we had additional TANF funding available, which allowed us to support two excellent community organizations:

- END IT (Everybody's Not Doing It) - We sponsored 21 young people in their program
- Boys and Girls Club of St. Lucie County - We sponsored 19 participants in their program

Both programs run for a total of eight weeks, with participants having just completed their first four weeks. The programs are scheduled to conclude on August 1st.

Ms. Batton reports that everything is progressing well. We're proud to support these valuable programs and hope to continue this partnership in future years, funding permitting.

The impact these programs have on our young people and the community is invaluable, and we're grateful for the opportunity to contribute to teen pregnancy prevention efforts in our area.

Agenda Item 7 - Workforce Innovation Opportunity Act (WIOA) Youth - Eckerd Program Update:

Angie Strickland, Program Manager, provided updates on the WIOA Youth program.

Ms. Strickland shared that despite budget constraints, the WIOA Youth program achieved several significant milestones this year. Notably, we successfully supported one participant's transition to fire science or paramedic training, demonstrating our commitment to career advancement despite limited resources.

This year, the Youth Program introduced a significant enhancement to our work experience program. Previously, participants were restricted to a standard 192-hour limit. A new flexible approach was piloted that aligns hours with actual job requirements:

- Warehouse positions: 100-120 hours
- HVAC positions: Up to 300 hours
- Hours now match the complexity and learning curve of specific roles

This pilot program exceeded expectations. Both youth participants and employers responded

positively to the changes. We successfully facilitated several transitions from work experience to On-the-Job Training (OJT) programs, creating clear pathways for career development.

After careful consideration and employer feedback, the \$15 hourly wage from the previous program year was maintained. Several employers indicated that the \$15 rate created challenges for post-internship hiring decisions. We anticipate increasing wages in the upcoming program year, pending contract renewal.

Ms. Strickland spoke highly of her staff's performance this year. Their dedication and adaptability were instrumental to our success. Additionally, their partnership with CareerSource proved invaluable - their flexibility in allowing us to serve youth throughout the community was essential to our outreach efforts.

Ms. Strickland also noted that the IT support team deserves recognition for their responsive assistance in setting up our operations wherever needed.

Based on this year's stellar results, Ms. Strickland is optimistic about continuing these successful initiatives into the new program year. We look forward to building on these achievements and maintaining our strong partnerships.

Agenda Item 8 - Adjournment:

Having no other business, the Youth Council meeting was adjourned at 8:32 AM.

BOARD STAFF CERTIFICATION

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

Board Staff
Shelly Batton

Date





Agenda Item 5c Programs and Services Meeting Minutes

August 27, 2025

Opening Remarks

1. Welcome & Attendance

Voting Items

2. Review and Approve Welfare Transition (WT) - Transitional Supportive Services Policy
3. Review & Approve Welfare Transition (WT) - Up-Front Diversion Policy
4. Review & Approve Welfare Transition (WT) - Work Requirement Penalties and Pre-Penalty Counseling Policy
5. Review & Approve Welfare Transition (WT) - Hardship Extensions for Temporary Cash Assistance Policy
6. Review and Approve Reemployment Services and Eligibility Assessment (RESEA) - Program Design and Framework Policy
7. Review and Approve Workforce Innovation & Opportunity Act (WIOA) - Program Design and Framework Policy
8. Review and Approve Workforce Innovation & Opportunity Act (WIOA) - Youth Services Subrecipient Contract for PY2025-2026 (PY 5 of 5)
9. Review and Approve - Local Targeted Occupations List (LTOL) for 2nd Quarter - PY2025-2026

Information/Discussion

10. HOPE Florida Update
11. CareerSource Research Coast (CSRC) Business Services Update
12. CareerSource Research Coast (CSRC) Programs Update
 - a. Wagner-Peyser, Migrant and Seasonal Farmworkers (MSFW)
 - Wagner-Peyser
 - Traffic/Re-employment
 - Outreach Specialist
 - b. Welfare Transition (WT) Program, Supplemental Nutrition Assistance Program (SNAP)
 - Community Service/Work Experience Sites
 - Caseloads
 - FLORIDA System



- c. Jobs for Veterans State Grant (JVSG) Program
 - Stand Down
 - Annual Summit
 - d. Workforce Innovation and Opportunity Act (WIOA) Program - Adult/Dislocated Worker
 - WIOA Orientation
 - Training Grants
 - e. Workforce Innovation and Opportunity Act (WIOA) Program - Youth
 - PY24-25 Internal Performance
13. Adjournment - Next P & S Meeting – November 19, 2025

Members Present

Bob Cenk Deb Frazier

Members Participating by Teleconference

Jim Brann Wayne Olson Kelly Johnson

Members Excused

David Bean Jose Capellan

Members Unexcused

None

Staff Present

Tracey McMorris	Shelly Batton	Christina Coble
Kate Sayger	Jodi Thomas	Martin Rivera
Jennifer Eimann		

Call to Order

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

Agenda Item 2 - Review and Approve Welfare Transition (WT) - Transitional Supportive Services Policy:

Shelly Batton, Director of Programs, noted in her summary that transitional services are services provided to give support to individuals as they actively seek, accept, and maintain employment. These services are not entitlements but provide available support for up to two years to help individuals and families gain the skills and resources they need to make a successful transition from public assistance to self-sufficiency.

During the 2024 legislative session, House Bill 1267 (HB 1267) was passed and included additional requirements related to transitional services, including:

- When contacting a recipient of cash assistance who is determined ineligible for a reason other than a work activity sanction, a workforce system case manager must administer the exit survey, which must be attempted before closure of the case management file.



- Detailed transitional case management requirements, including, but not limited to, the use of a tool to demonstrate future financial impacts of the participant's change in income and benefits over time. The State of Florida will be using the Career Ladder Identifier and Financial Forecaster (CLIFF) Dashboard tool and the One-Stop Service Tracking (OSST) budget planner wizard.

Staff revised CSRC's local Transitional Supportive Services Policy to align with House Bill 1267, as well as to mirror Administrative Policy Number 020 Transitional Benefits and Services.

Deb Frazier moved to approve the Welfare Transition (WT) - Transitional Supportive Services Policy, as presented. Jim Brann seconded the motion, which passed unanimously.

Agenda Item 3 - Review and Approve Welfare Transition (WT) - Up-Front Diversion Policy:

Shelly Batton, Director of Programs, noted in her summary that individuals apply for Temporary Cash Assistance (TCA) for many reasons, including assistance with recurring needs such as shelter, utility payments, food, and monthly expenses. However, many applicants do not need ongoing TCA, but, due to an unexpected circumstance or emergency, require some immediate assistance to secure or retain employment or child support. These immediate obligations may include shelter or utility payments, car repairs to continue employment, or other services that alleviate the applicant's emergency financial need, allowing the person to focus on obtaining or continuing employment. These needs may be met through up-front diversion, which is available only to applicants as an alternative to ongoing TCA.

House Bill 1267, effective July 1, 2024, requires Local Workforce Development Boards (LWDBs) to administer the intake survey as part of the screening process for up-front diversion.

Staff revised CSRC's local Up-Front Diversion Policy to align with House Bill 1267 requirements, as well as to mirror Administrative Policy Number 013 Up-Front Diversion.

Jim Brann moved to approve the Welfare Transition (WT) - Up-Front Diversion Policy, as presented. Kelly Johnson seconded the motion, which passed unanimously.

Agenda Item 4 - Review & Approve Welfare Transition (WT) - Work Requirement Penalties and Pre-Penalty Counseling Policy:

Shelly Batton, Director of Programs, noted in her summary that cash assistance recipients must complete mandatory work participation hours each month to maintain their benefits:

- Single Parents with Children 5 and Under - 87 hours per month in "core activities"
- Single Parents with Children 6 and Older - 130 hours per month total (87 hours in core activities and 43 hours in "core plus" activities)



Activity Types

Core Activities (standalone activities):

- Job searching
- Work experience programs
- Community service
- On-the-job training
- Education/school attendance

Core Plus Activities (must be combined with core activities):

- Job skills training
- Supplemental skill development (e.g., typing, computer skills)

Ms. Batton explained that when recipients fail to meet requirements, career planners must:

- Contact them orally
- Send written notification
- Provide 10 calendar days to comply

If compliance is not achieved within 10 days, the following sanctions apply:

- First Level: 10-day benefit suspension
- Second Level: 1-month benefit suspension
- Third Level: 3-month benefit suspension

Recipients with second or third-level sanctions who have children under 16 may continue receiving benefits through a protective payee, where another person manages the funds solely for the child's benefit.

Penalties can be waived if recipients have valid reasons for non-compliance, such as:

- Hospitalization
- Car accidents
- Other legitimate emergencies

Career planners have the authority to determine good cause and lift penalties without consequences.

Jim Brann moved to approve the Welfare Transition (WT) - Work Requirement Penalties and Pre-Penalty Counseling Policy, as presented. Deb Frazier seconded the motion, which passed unanimously.

Agenda Item 5 - Review & Approve Welfare Transition (WT) - Hardship Extensions for Temporary Cash Assistance Policy:

Shelly Batton, Director of Programs, noted in her summary that the Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) of 1996, also known as the 1996 Welfare Reform Act, became law effective August 22, 1996. The PRWORA changed cash assistance from an open-ended entitlement program to a time-limited cash assistance program, created the federal Temporary Assistance to Needy Families (TANF) Program, which replaced the Aid to Families with Dependent Children, and required work requirements of recipients in exchange for TCA. The state of Florida imposed a cumulative lifetime limit of 48 months of receipt of cash assistance rather than the 60 months allowed by PRWORA.



The 48-month lifetime limit does not apply to:

- Cases in which a child is the only recipient. Therefore, any month that a minor child receives TCA is not counted towards their 48-month lifetime limit.
- An individual who receives Supplemental Security Income (SSI) benefits or Social Security Disability Insurance (SSDI) benefits.
- An individual who is the caretaker of a disabled family member. The case file must contain documentation that the disabled family member requires a caretaker and that there are no other means by which the disabled family member can be cared for.

During the 2024 legislative session, House Bill (HB) 1267 was passed, requiring additional actions for recipients approaching the statutory time limitation for TCA. The bill requires staff:

- Collect information on the TCA recipient's enrollment in other benefits programs, long-term career plan, credentials, education, or training received during enrollment, barriers to employment addressed, and the remaining barriers to employment through administration of an exit survey at the points of contact required when a TCA recipient becomes, or is anticipated to become, ineligible for TCA.
- Utilize a financial tool such as the Career Ladder Identifier and Financial Forecaster (CLIFF) to demonstrate future financial impacts of the participant's change in income and benefits over time.

Staff revised the CSRC's local Hardship Extension Policy to align with House Bill 1267. This revision aims to administer the exit survey and utilize the Career Ladder Identifier Financial Forecaster tool in specified circumstances, while also mirroring Administrative Policy Number 037, Work Requirement Penalties, and Pre-Penalty Counseling.

Kelly Johnson moved to approve the Welfare Transition (WT) - Hardship Extensions for Temporary Cash Assistance Policy, as presented. Kelly Johnson seconded the motion, which passed unanimously.

Agenda Item 6 - Review and Approve Reemployment Services and Eligibility Assessment (RESEA) - Program Design and Framework Policy:

Tracey McMorris, VP of Operations/COO, explained that the Reemployment Services and Eligibility Assessment (RESEA) program began as the voluntary REA pilot launched by USDOL in 2005 to support UI claimants with reemployment needs and reduce improper benefit payments. RESEA replaced REA in 2016 and became mandatory for all Florida LWDBs in 2022. The program helps RA claimants return to work more quickly, reduces the average duration of benefits, and safeguards program integrity by preventing improper payments. It also aligns with WIOA's vision of integrated service delivery and serves as an entry point for claimants into the broader workforce system and partner programs.

As a result, staff developed a policy to align with CareerSource Florida's policy 128 that assists claimants in getting back to work quickly.

Wayne Olson moved to approve the Reemployment Services and Eligibility Assessment (RESEA) - Program Design and Framework Policy, as presented. Deb Frazier seconded the motion, which passed unanimously.



Agenda Item 7 - Review and Approve Workforce Innovation & Opportunity Act (WIOA) - Program Design and Framework Policy:

Shelly Batton, Director of Programs, noted in her summary that the Adult and Dislocated Worker programs provide training and employment services to WIOA-eligible participants.

The one-stop delivery system is the basic delivery system for such services. Through this system, adults and dislocated workers can access a continuum of services that range from access to self-service information about job postings, labor market information, available training programs, etc., to occupational skills training and work-based learning opportunities for high-skilled, high-demand jobs. LWDBs and local career centers work collaboratively with economic development, industry, and business partners to determine the talent needs for the local economy, and with educational institutions, service agencies, and other workforce partners to ensure that the mix of services available to job seekers can meet those talent needs and engage program participants in career pathways that lead to self-sufficiency.

Staff created CSRC's local policy to align with Administrative Policy Number 127 - Adult and Dislocated Worker Program Framework and Design, which became effective on 5/21/2025 and outlines services provided through the Adult and Dislocated Worker Programs under WIOA and the Wagner-Peyser Act Employment Service.

Wayne Olson moved to approve the WIOA - Program Design and Framework Policy, as presented. Kelly Johnson seconded the motion, which passed unanimously.

Agenda Item 8 - Review and Approve Workforce Innovation & Opportunity Act (WIOA) - Youth Services Subrecipient Contract for PY2025-2026 (PY 5 of 5):

Shelly Batton, Director of Programs, explained that CareerSource Research Coast (CSRC) is working with Eckerd Youth to renew the contract for PY 2025-2026 (5 of 5 years from the RFP term). Based on performance and fiscal integrity, a letter of intent has been executed to renew the WIOA Youth Services contract with Eckerd Connects for PY 2025-2026.

Ms. Batton explained that CSRC and Eckerd had reviewed the Statement of Work and discussed changes for the upcoming PY 2025-2026. Mr. Batton stated that the contract awards Eckerd Youth \$750,000 for PY 2025-2026.

Jim Brann moved to approve the Welfare Transition (WT) - Workforce Innovation & Opportunity Act (WIOA) - Youth Services Subrecipient Contract for PY2025-2026 (PY 5 of 5), as presented. Wayne Olson seconded the motion, which passed unanimously.

Agenda Item 9 - Review and Approve - Local Targeted Occupations List (LTOL) for 2nd Quarter - PY2025-2026

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



Staff reviewed local labor market information and resources regarding LTOL. There are no recommended additions or deletions of occupations to the 2nd Quarter of the PY 2025-2026 list. Staff recommends approval of this LTOL for the 2nd Quarter of PY 2025-2026.

Jim Brann moved to approve the Local Targeted Occupations List (LTOL) for the 2nd Quarter - PY2025-2026, as presented. Wayne Olson seconded the motion, which passed unanimously.

Agenda Item 10 - HOPE Florida Update:

Tracey McMorris, VP of Operations/COO, explained that the Hope Florida program has demonstrated strong performance, serving 372 individuals. Ms. McMorris stated that LWDB20 is third in the state behind two of the largest boards.

Ms. McMorris stated that the success of this program is the focus on engaging everyone across our organization in identifying Florida participants. The program emphasizes initial engagement and eligibility screening for participants, while also collaborating with business services to create job opportunities.

Ms. McMorris stated that a key component of our success has been our collaboration with local businesses to create meaningful employment opportunities. Christina Coble and our Business Services team have been instrumental in building these crucial employer relationships and job placement pathways.

Agenda Item 11 - CareerSource Research Coast (CSRC) Business Services Update:

Christina Coble, Business Services Manager, shared the following Business Services Updates:

- On-the-Job Training Update: Ms. Coble stated that the On-the-Job Training (OJT) program connects job seekers with employers who are willing to hire candidates who may not have all the required skills for a position. In exchange for providing on-the-job training, eligible employers can be reimbursed 50% of the job seeker's wages during a predetermined training period, typically lasting 3-5 months.

Ms. Coble stated the following performance outcomes for PY2024-2025:

- Successfully placed 50 participants in on-the-job training positions
- Invested \$225,000 in OJTs for these placements
- Additional funds remain allocated for participants who continued into the new program year, as reimbursements are processed as participants receive their paychecks

Ms. Coble stated that the focus on on-the-job training reflects understanding that classroom training is not suitable for everyone. OJT often provides a more direct pathway to self-sufficiency, enabling participants to re-enter the workforce more quickly. This approach aligns with our core mission of helping individuals achieve independence and reducing their reliance on assistance programs, and remains motivated by our success in assisting people to return to work and achieve self-sufficiency.

- Upcoming Job Fair/Events Update: Ms. Coble stated that the partnership between CSRC and the City of Port St. Lucie continues to yield exceptional results. The job fair held on Monday, August 25th, at the Mid-Florida Event Center was very successful.



Event Highlights:

- 59 employers participated
- 12 community partners provided additional services
- 1,063 job seekers attended

Ms. Coble stated that this impressive turnout reflects both the success of our event and potentially indicates a slight uptick in unemployment as more individuals actively seek new opportunities.

Ms. Coble reiterated that the business services team was instrumental in recruiting employer participants and ensuring diverse industry representation to maximize opportunities for all job seekers. While comprehensive outcome tracking for events of this scale is challenging, she expects to measure positive employment results, particularly for the job seekers we directly serve.

Ms. Coble shared upcoming events:

Keiser University Partnership Job Fair

- Format: Two-phase event (students first, then public access)
- Timeline: Late November (date being finalized this week)
- Duration: 3-4 hours

Paychecks for Patriots Veterans Job Fair

- Date: November 13, 2025
 - Focus: Veteran employment (open to the public)
 - Target: Military veterans transitioning to civilian careers
- Staffing Updates: Ms. Coble shared that Rona Scott, Regional Recruiter, has been promoted to Business Navigator, serving Martin County. Tameka Johnson has been hired as the Regional Recruiter, replacing Ms. Brighthaupt.
 - Summer of Success Update: Ms. Coble shared an overview of how the Summer of Success (SOS) program performed this year.

Ninety-three applications were received for the program this year. Outreach efforts were highly successful, and 90 of the 93 applicants (97% response rate) were interviewed. Only three applicants remained non-responsive despite multiple attempts.

Due to budget constraints, 40 participants from the 90 interviewed were chosen to participate in the SOS program. The quality of applicants was exceptionally strong.

All selected participants completed Florida Ready to Work, a state-recognized certification program focused on:

- Essential employment skills
- Workplace soft skills
- Professional readiness training



This classroom training component is particularly valuable since most participants are entering the workforce for the first time. As discussed in previous meetings, these foundational workplace skills are increasingly important for both youth and adult workers.

Upon completion of the training week, participants received:

- Florida Ready to Work certificate
- Visa gift card incentive

Following certification, participants entered a 4-week paid internship program:

- 32 hours per week
- \$15 per hour
- Total earning potential: \$2,000 per participant

CSRC partnered with eight internship employers across 26 different work sites, providing diverse opportunities to match student interests and career goals.

St. Lucie County (our largest partner)

- Engineering departments
- Parks and Recreation
- Various county departments

This variety ensured we could place students in roles aligned with their interests and career aspirations.

Agenda Item 12 - CareerSource Research Coast (CSRC) Programs Update:

a. Shelly Batton - Wagner-Peyser Updates:

- Increased Traffic and Services - The Comprehensive Career Center has experienced a significant increase in foot traffic. While many visitors initially come to see the new facility, they are primarily seeking employment assistance and support services.
- ID.me Verification Support - A major driver of increased traffic is the reemployment identification confirmation process through ID.me. Many clients find the computer-based verification process challenging and are seeking our assistance in large numbers.

To address this need, the center has established:

- A dedicated computer and phone bank located in the back area of the center
- On-site staff available to provide hands-on assistance
- A direct line to Florida Commerce for immediate support
- Comprehensive help with the entire identification verification process

This ensures clients can receive both immediate technical assistance and direct access to the state resources when needed.



b. Shelly Batton - Migrant and Seasonal Farmworkers (MSFW) Updates:

- Staffing - Actively recruiting for an Outreach Specialist since the previous employee resigned in March.

Two interviews conducted on August 26, 2025, yielded two promising candidates who will be moving forward to the next round. One candidate was particularly impressive and stood out among the applicants. Very optimistic about her potential fit for the role.

This hiring decision is critical for our operations, as the MSFW program has been on hold due to the vacancy. Currently, we have only one staff member managing the entire program, which is not sustainable long-term. We hope to fill this position soon, enabling us to fully restore our MSFW services to the community.

Staff will keep the committee updated on the hiring process.

c. Shelly Batton - Jobs for Veterans State Grant (JVSG) Program Update:

- Stand Down - Our recent community outreach efforts were highly successful. We distributed MREs donated by the Treasure Coast Food Bank, cases of water donated by Walmart, and comprehensive hygiene bags provided by the VA. The positive community response reinforces the value of these initiatives.
- The Annual Florida Veterans Workforce Summit – This event is scheduled for 9/22-9/25 in Tampa. This mandatory event for all Veterans Program staff provides valuable opportunities for:
 - Professional networking
 - Skills training and development
 - Team building activities

Ms. Batton stated that she looks forward to this important gathering and the benefits it brings to the JVSG program.

- Staffing - Two case managers (DVOPs) from our Veterans Program team recently left CSRC.

Ms. Batton reported that two job offers have been made and accepted. These positions are now moving through the Florida Commerce approval process:

- One DVOP (case manager) position
- One consolidated position combining case management and employer advocacy responsibilities

Ms. Batton reported that during this transition period, WIOA career planners have demonstrated exceptional dedication by taking on case management responsibilities for all veterans previously served by our DVOPs. Despite having limited experience in this area and managing a substantial caseload, they are performing admirably and deserve recognition for their commitment to serving our veteran community.



d. Shelly Batton - Workforce Innovation and Opportunity Act (WIOA) Program - Adult/Dislocated Worker:

- WIOA Orientation - Ms. Batton shared a schedule update on the WIOA orientation sessions that are offered twice weekly on Tuesday mornings and Thursday afternoons.

Due to space constraints since our move to the Career Center, we have transitioned from our previous hybrid model (virtual and in-person options) to fully virtual sessions. Despite this change, the program remains highly successful and effective for participants.

The promotional flyer and informational materials were updated to reflect these changes.

- Training Grants - Ms. Batton stated that year-to-date, since July 1st, 15 Individual Training Accounts (ITAs) have been funded. These ITAs support occupational skills training in key areas:
 - Healthcare: RNs, LPNs, and paramedics
 - Transportation: Commercial Driver's License (CDL) programs

e. Workforce Innovation and Opportunity Act (WIOA) Program – Youth:

- PY24-25 Internal Performance - Ms. Batton shared that CareerSource Research Coast (CSRC) is working with Eckerd Youth to renew the contract for PY 2025-2026 (5 of 5 years of RFP term). CSRC and Eckerd had reviewed the PY 2024-2025 Statement of Work.

Ms. Batton confirmed that CSRC would like to renew this contract for the 2025-26 period. This will be the final year of the current contract term. As per the contract, Eckerd Youth will be awarded \$750,000.

Ms. Batton explained that Eckerd Youth has performed exceptionally well throughout this past program year, successfully meeting all established metrics and performance standards. CSRC is very satisfied with their work and looks forward to continuing our partnership.

Agenda Item 13 - Adjournment:

With no further items to discuss, Bob Cenk moved to adjourn the meeting, seconded by Deborah Frazier. All members agreed, and the meeting was adjourned at 9:05 a.m.

The next Programs and Services Committee Meeting – November 19, 2025.



BOARD STAFF CERTIFICATION

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

Shelly Batton
Board Staff

Date

Agenda Item 5d Executive Committee Meeting

September 12, 2025

Opening Remarks

1. Welcome & Attendance
2. Conflict of Interest Declaration

Voting Items

3. Review and Approve Financial Statements - May, June, July 2025
4. Review and Approve Final Budget - PY 2025-2026
5. Consent Agenda
 - a. Review and Approve Welfare Transition (WT) - Transitional Supportive Services Policy
 - b. Review and Approve Welfare Transition (WT) - Up-Front Diversion Policy
 - c. Review and Approve Welfare Transition (WT) - Work Requirement Penalties and Pre-Penalty Counseling Policy
 - d. Review and Approve Welfare Transition (WT) - Hardship Extensions for Temporary Cash Assistance Policy
 - e. Review and Approve Reemployment Services and Eligibility Assessment (RESEA) Program Design and Framework Policy
 - f. Review and Approve Workforce Innovation & Opportunity Act (WIOA) - Program Design and Framework Policy
6. Review and Approve Workforce Innovation & Opportunity Act (WIOA) - Youth Services Subrecipient Contract for PY2025-2026 (RFP Term 5 of 5)
7. Review and Approve Local Targeted Occupations List (LTOL) for 2nd Quarter - PY2025-2026
8. Review and Approve Recommendation for Executive Staff Salary Compensation

Information/Discussion

9. Declaration of Authority - Angela Browning, Designee for Timothy Moore, President, Indian River State College
10. Department of Commerce (FLORIDACOMMERCE) Financial and Programmatic Compliance Monitoring Review - PY 2024-2025
11. CareerSource Research Coast (CSRC) Updates
 - Ad Hoc Search Committee - Board Membership
 - Lippes Mathias LLP General Counsel - Engagement Letter
 - Port St. Lucie Business Center Lease Settlement



Member Present

Leslie Kristof Will Armstead

Members Participating by Teleconference:

Jim Brann Terrance Moore Christi Shields

Members Excused

Bob Cenk Werner Bols

Administrative Staff Present/Teleconference:

Brian Bauer Tracey McMorris Lisa Delligatti
Jennifer Eimann

Call to Order:

Jim Brann, Chair, called the meeting to order at 8:07 a.m. A quorum was established.

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

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

Agenda Item 3 - Review and Approve Financial Statements - May, June, July 2025:

Lisa Delligatti, CFO, provided an update on the current financial status and recent grant developments for PY2025-2026.

July expenses were significantly lower than anticipated due to several factors:

- Payroll Accruals: Our accounting is based on June 30th cutoffs, so any payroll with access to June pay periods was accrued in June. This included the first two payrolls and 1.5 days of the third payroll, resulting in minimal July payroll expenses.
- Facility Costs: We did not incur rent expenses until July 15th, which was lower than originally budgeted.

Ms. Delligatti stated that expenses will increase in August as we return to normal operational levels with three full payroll periods.

Grant Program Updates:

New program year funding comes with important changes:

- HOPE Navigator and HOPE Training grants have been combined into a single NFA (Notice of Funding Award)
- HOPE Training is now called Sector Strategic Focus
- You will no longer see a separate "Apprenticeship Navigator" line item

Ms. Delligatti explained that several grants end on September 30th as they follow the state fiscal year cycle. Once these close, new funding will be released.

With no further discussion, Leslie Kristok moved to approve the Financial Statements - May, June, and July 2025, as presented. William Armstead seconded the motion, which passed unanimously.



Agenda Item 4 - Review and Approve Final Budget - PY 2025-2026:

Lisa Delligatti, CFO, presented the funding allocations for PY 2025-2026. Ms. Delligatti explained that each year, the Board approves a budget for the following program year.

Board Staff has received final allocations for the WIOA, Wagner Peyser, and Welfare Transition programs for PY 2025-2026. Based on this information, the finance department met with Executive Management staff and drafted a final budget to present to the Board of Directors. The Board will have the opportunity to approve the 2025-2026 final budget at the September 24, 2025 meeting.

With no further discussion, William Armstead moved to approve the Final Budget - PY 2025-2026, as presented. Leslie Kristof seconded the motion, which passed unanimously.

Agenda Item 5 - Consent Agenda:

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

With no further discussion, Christi Shields moved to approve the Consent Agenda, as presented. Terrance Moore seconded the motion, which passed unanimously.

Agenda Item 6 - Review and Approve Workforce Innovation & Opportunity Act (WIOA) - Youth Services Subrecipient Contract for PY2025-2026 (RFP Term 5 of 5):

Brian Bauer, President/CEO, shared that CareerSource Research Coast (CSRC) is working with Eckerd Youth to renew the contract for PY 2025-2026 (5 of 5 years of RFP term). CSRC and Eckerd had reviewed the PY 2024-2025 Statement of Work.

Ms. Bauer confirmed that CSRC would like to renew this contract for the 2025-26 period. This will be the final year of the current contract term. As per the contract, Eckerd Youth will be awarded \$750,000.

Ms. Bauer explained that Eckerd Youth has performed exceptionally well throughout this past program year, successfully meeting all established metrics and performance standards. CSRC is very satisfied with their work and looks forward to continuing our partnership.

With no further discussion, Terrance Moore moved to approve the Workforce Innovation & Opportunity Act (WIOA) - Youth Services Subrecipient Contract for PY2025-2026, as presented. Leslie Kristof seconded the motion, which passed unanimously.

Agenda Item 7 - Review and Approve Local Targeted Occupations List (LTOL) for 2nd Quarter - PY2025-2026:

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



Staff reviewed local labor market information and resources regarding LTOL. There are no recommended additions or deletions of occupations to the 1st Quarter of the PY 2025-2026 list. Staff recommends approval of this LTOL for the 1st Quarter of PY 2025-2026

With no further discussion, Leslie Kristof moved to approve the Local Targeted Occupations List (LTOL) for 2nd Quarter - PY2025-2026, as presented. William Armstead seconded the motion, which passed unanimously.

Agenda Item 8 - Review and Approve Recommendation for Executive Staff Salary Compensation:

Mr. Bauer asked that this item be moved to the end of the agenda to allow time for discussion by committee members.

The committee reached a unanimous consensus to advance to Agenda Item 9, postponing Agenda Item 8 until last.

Agenda Item 9 - Declaration of Authority - Angela Browning, Designee for Timothy Moore, President, Indian River State College:

Brian Bauer, President/CEO, stated that the By-Laws of the Workforce Development Board permit mandatory board members to designate a single, high-ranking designee for decision-making authority from his/her organization to represent him/her at the Board and/or at the standing or Ad Hoc committee meetings. Per the Board's By-Laws, Timothy Moore has requested that Angela Browning represents him at the Board of Directors and P & S Committee meeting when Dr. Moore is not available to attend.

Agenda Item 10 - Department of Commerce (FLORIDACOMMERCE) Financial and Programmatic Compliance Monitoring Review - PY 2024-2025:

Brian Bauer, President/CEO, stated that our finance department, under Lisa Delligatti's outstanding leadership, achieved another year with zero findings. Congratulations to Ms. Delligatti and her entire team for maintaining exceptional fiscal management standards with no findings, observations (ONIs) noncompliance issues in our financial report monitoring.

Mr. Bauer presented a summary of the Program Year, July 1, 2023- June 30, 2024, Programmatic Monitoring Report:

- SNAP Program:
 - 1 current year finding (increase from 0 last year)
 - 1 current year O&I (increase from 0 last year)
 - Status: Both issues addressed in CAP, approved by Florida Commerce
- WIOA Adult Program:
 - 0 findings (excellent performance)
 - 1 current year ONI
 - Status: Addressed in CAP, approved by Florida Commerce
- Wagner-Peyser Program:
 - 1 finding (increase from 0 last year)
 - 5 prior year ONIs (all identified and described)
 - Status: All addressed in CAP, approved by Florida Commerce
 - Note: Given the high staff interaction nature of this program, maintaining findings under 5 is considered excellent



- JVSG (Veterans Program):
 - 1 current year finding
 - Status: Addressed in CAP, approved by Florida Commerce
 - Note: This continues to be a challenging program area
- MSFW (Migrant Seasonal Farm Worker Program):
 - 2 findings this year (same as last year)
 - Challenge: Declining agricultural sector and participant population
- Board Governance:
 - 2 findings
 - 1 ONI
 - Note: Financial Disclosure Compliance: Board members must complete financial disclosures online and on time, and,
Consortium Chair Election: Modified our process to comply with interlocal agreement requirements - we no longer elect a consortium chair; instead, each member signs all documents, and,
Board Orientation Timeline: Addressed orientation completion requirements

Mr. Bauer stated that all corrective action plans have been submitted and approved by Florida Commerce. We continue to work closely with state leadership on program improvements and policy clarifications, particularly regarding the MSFW program's future structure.

Agenda Item 11 - CareerSource Research Coast (CSRC) Updates:

Brian Bauer, President/CEO, presented the following updates to the Executive Committee Members.

Ad Hoc Search Committee - Board Membership:

Mr. Bauer announced that David Bean from Walmart Distribution submitted his resignation last week. With Mr. Bean's departure, we now have three private sector positions available on the board.

To address these openings, Will Armstead and Jim Brann will collaborate to establish an Ad Hoc search committee. This committee will be responsible for identifying and reaching out to qualified candidates for these board positions.

The committee will keep the board updated as the process moves forward.

Lippes Mathias LLP General Counsel - Engagement Letter:

Mr. Bauer shared that he executed an engagement letter with the same law firm that handles our other legal needs, Lippes Mathias, LLP. The following details were provided:

- Payment Structure: Pay-as-you-go basis only - no retainer fees required
- Activation: Services are only invoked when specific needs arise
- Firm Background: This is the same firm that represents CareerSource Palm Beach, so they're already well-versed in:
 - Workforce development operations
 - Federal funding requirements and regulations
 - Our organizational structure and processes



Contract Terms:

- Agreement is signed and currently active
- Prorated for the current program year
- Will renew annually each July along with our other contracts

This arrangement ensures we have immediate access to qualified general counsel services when needed, without ongoing costs, and with a firm that already understands our industry and compliance requirements.

Port St. Lucie Business Center Lease Settlement:

Mr. Bauer provided a final update on the legal settlement being managed with St. Lucie Business Center.

Career Source Research Coast (CSRC) has reached a settlement resolution. The matter has been successfully resolved, with the organization being responsible for only \$5,000 toward the settlement. This amount represents our deductible portion.

The insurance carrier stepped in to cover the settlement amount to bring this matter to a close. While we had a strong case and good probability of success if we had proceeded to trial, both we and the carrier preferred to avoid the risks and costs associated with continued litigation. Given our limited financial resources and the restriction on using grant funding for such purposes, this resolution was the most practical path forward.

Mr. Bauer stated that future considerations may impact our insurance policy renewal next year, though we expect to maintain reasonable coverage.

REVISIT Agenda Item 8 - Review and Approve Recommendation for Executive Staff Salary Compensation:

Brian Bauer stated that in accordance with the DEO Grantee/Sub-Grantee Agreement requirements, any modifications to executive staff compensation must receive documented Board approval and comply with local policies and procedures. The Board must verify that these adjustments represent reasonable and necessary investments in successful award performance and demonstrate prudent use of federal funding.

The Executive Committee reviewed Executive Staff Salary Compensation, and after further discussion, recommended the following Executive Staff Salary Increases:

- Brian Bauer - Annual salary adjustment to \$147,000
- Tracey McMorris - Annual salary adjustment to \$107,500
- Lisa Delligatti - Annual salary adjustment to \$107,500

With no further discussion, Leslie Kristof moved to Approve Recommendation for Executive Staff Salary Compensation, with revisions. William Armstead seconded the motion, which passed unanimously.



Agenda Item 18 - Adjournment:

With no further items to discuss, a motion was made by Jim Brann to adjourn the meeting, seconded by Leslie Kristof. The motion passed unanimously, and the meeting was adjourned at 9:10 a.m.

Next Executive Committee Meeting – October 17, 2025

BOARD SECRETARY CERTIFICATION

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

Brian Bauer
Secretary

Date

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 May, June, and July Financial Reports - PY 2024-2025, and 2025-2026
Background	The Board approved the budget for PY 2024-2025. The Executive Committee will review the PY 2025-2026 final budget, all amendments to the budget, and monthly expenditures at the September 12, 2025 committee meeting. The Board will have the opportunity to review and approve the 2025-2026 final budget at the September 24, 2025 meeting.
Staff Recommendations	Review and Approve May, June, and July 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

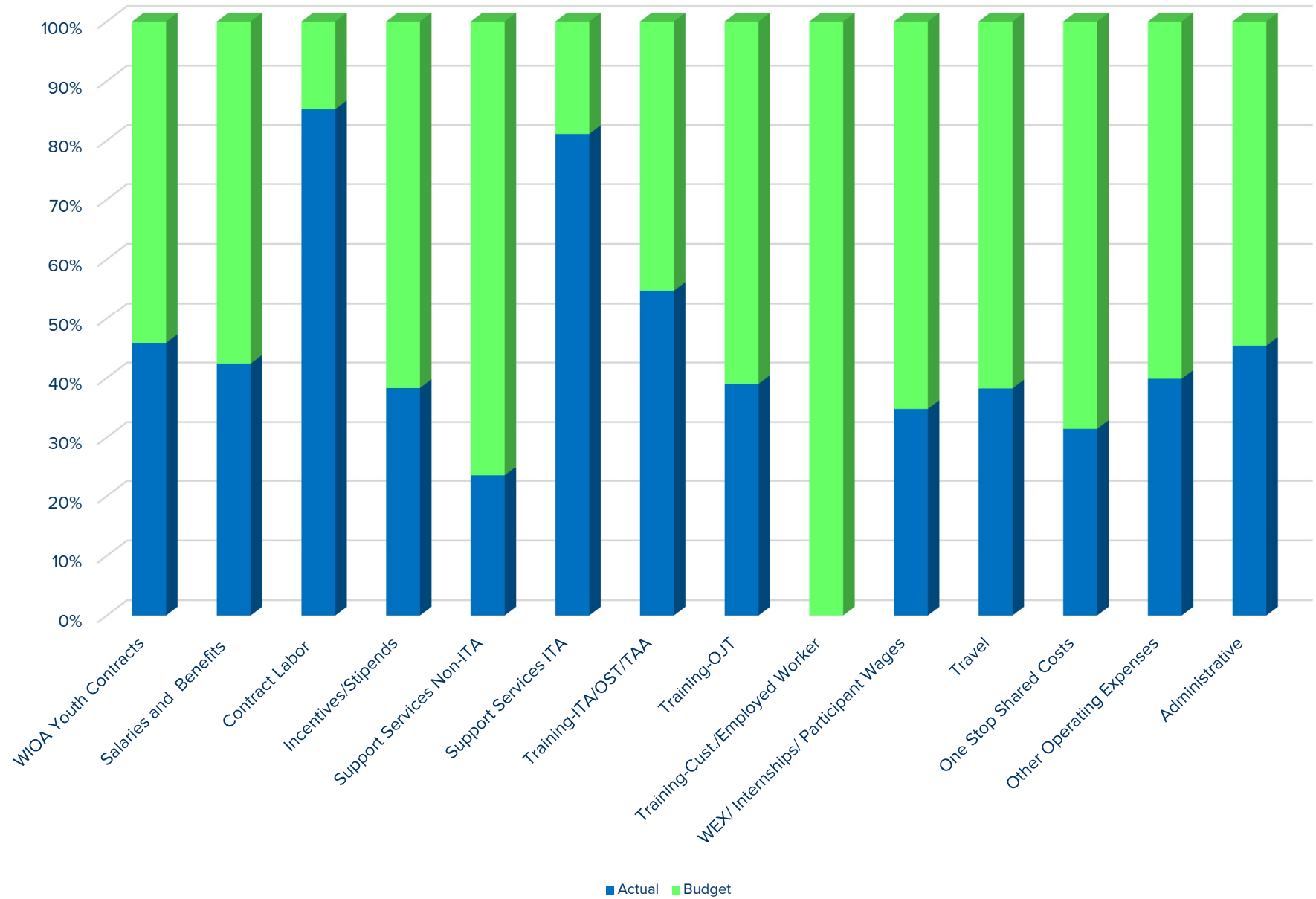
LWDB 20
Summary of Funding and Expenditures
as of May 31, 2025

PY 24-25 TOTAL AVAILABLE FUNDING	INDIRECT	10 ADULT	12 DW	11 YOUTH	17 WIOA Supplemental	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	392 DWG Helene Milton	40 WTP	470 Apprenticeship Navigator	474 Rapid Response Navigator
PY 24-25 Allocations		\$ 826,927	\$ 747,469	\$ 684,294	\$ 170,532	\$ 794,094	\$ 277,746	\$ 126,167	\$ 166,108	\$ 445,253	\$ 75,000	\$ 963,229	\$ 80,000	\$ 63,800
PY 24-25 Supplemental		\$ -	\$ 164,384	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ (340,990)	\$ -	\$ (78,446)	\$ (91,168)	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 25-26		\$ -	\$ (323,313)	\$ (337,262)	\$ -	\$ (330,407)	\$ (93,026)	\$ (8,699)	\$ (41,090)	\$ (114,078)	\$ -	\$ (369,333)	\$ -	\$ (34,419)
Carryforward from PY 23-24		\$ 8,026	\$ 800,000	\$ 595,000	\$ -	\$ 101,125	\$ 76,500	\$ 20,463	\$ 24,529	\$ 122,540	\$ -	\$ 265,803	\$ -	\$ -
Total DEO Grant Funding		\$ 834,953	\$ 1,388,540	\$ 942,032	\$ 170,532	\$ 223,822	\$ 261,220	\$ 59,485	\$ 58,379	\$ 461,462	\$ 75,000	\$ 859,699	\$ 80,000	\$ 40,581
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ -	\$ 834,953	\$ 1,388,540	\$ 942,032	\$ 170,532	\$ 223,822	\$ 261,220	\$ 59,485	\$ 58,379	\$ 461,462	\$ 75,000	\$ 859,699	\$ 80,000	\$ 40,581
FUNDING DRAWN DOWN YTD	INDIRECT	10 ADULT	12 DW	11 YOUTH	17 WIOA Supplemental	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	392 DWG Helene Milton	40 WTP	470 Apprenticeship Navigator	474 Rapid Response Navigator
PY 24-25 Allocations		\$ 769,907	\$ 20,100	\$ 133,512	\$ 45,938	\$ 147,395	\$ 58,175	\$ 22,011	\$ 17,007	\$ 182,672	\$ 53,740	\$ 366,681	\$ 70,200	\$ 13,250
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	\$ 850,068	\$ 595,000	\$ -	\$ 101,125	\$ 76,500	\$ 20,463	\$ 24,529	\$ 122,540	\$ -	\$ 265,803	\$ -	\$ -
Total DEO Grant Funding		\$ 777,933	\$ 870,168	\$ 728,512	\$ 45,938	\$ 248,519	\$ 134,675	\$ 42,474	\$ 41,535	\$ 305,212	\$ 53,740	\$ 632,484	\$ 70,200	\$ 13,250
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL		\$ 777,933	\$ 870,168	\$ 728,512	\$ 45,938	\$ 248,519	\$ 134,675	\$ 42,474	\$ 41,535	\$ 305,212	\$ 107,480	\$ 632,484	\$ 70,200	\$ 13,250
% of Total Budgeted Funding Received		93.17%	62.67%	77.33%	26.94%	111.03%	51.56%	71.40%	71.15%	66.14%	143.31%	73.57%	87.75%	32.65%
EXPENDITURES														
Administrative	\$ -	\$ 75,304	\$ 88,711	\$ 16,483	\$ 26,549	\$ 80,447	\$ 19,063	\$ 4,798	\$ 4,697	\$ 44,348	\$ 8,202	\$ 86,756	\$ 10,733	\$ 1,794
Salaries and Benefits	\$ 409,326	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 151,981	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (561,307)	\$ 248,863	\$ 11,036	\$ 16,483	\$ -	\$ 11,231	\$ 19,063	\$ 4,798	\$ 4,697	\$ 44,348	\$ 8,202	\$ 86,756	\$ 10,733	\$ 1,794
Reclassification	\$ -	\$ (173,559)	\$ 77,675	\$ -	\$ 26,549	\$ 69,216	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ 683,791	\$ 767,403	\$ 776,942	\$ 1,077	\$ 159,438	\$ 115,091	\$ 38,008	\$ 37,301	\$ 267,764	\$ 45,538	\$ 522,950	\$ 63,566	\$ 10,863
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 678,410	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 219,836	\$ 661,546	\$ 29,153	\$ 14,560	\$ -	\$ 23,719	\$ 77,307	\$ 5,064	\$ 5,864	\$ 182,045	\$ 3,749	\$ 297,476	\$ 48,034	\$ 8,469
Contract Labor	\$ -	\$ 7,866	\$ 358	\$ -	\$ -	\$ 47	\$ 5,633	\$ 19	\$ 28	\$ 18,646	\$ 10,000	\$ 45,806	\$ 279	\$ 93
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,525	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ 672	\$ 36	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,416	\$ -	\$ -
Support Services ITA	\$ -	\$ 41,159	\$ 1,959	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 100	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ 292,107	\$ 12,414	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,595	\$ -	\$ -
Training-OJT	\$ -	\$ 185,826	\$ 6,486	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 27,946	\$ -	\$ -	\$ -
Travel	\$ 1,114	\$ 3,859	\$ 154	\$ 590	\$ -	\$ 561	\$ 1,150	\$ 4,674	\$ 2,447	\$ 1,045	\$ 5	\$ 2,560	\$ 414	\$ 52
One Stop Shared Costs	\$ -	\$ 79,917	\$ 3,579	\$ -	\$ -	\$ 40,176	\$ 12,226	\$ 23,942	\$ 24,627	\$ 32,428	\$ 359	\$ 50,899	\$ 7,333	\$ 1,021
Other Operating Expenses	\$ 34,179	\$ 73,980	\$ 5,698	\$ 75,889	\$ -	\$ 16,085	\$ 10,111	\$ 2,129	\$ 2,201	\$ 13,443	\$ 28	\$ 75,140	\$ 2,627	\$ 414
Allocated Program Indirect	\$ (255,128)	\$ 113,115	\$ 5,016	\$ 7,492	\$ -	\$ 5,105	\$ 8,665	\$ 2,181	\$ 2,135	\$ 20,157	\$ 3,648	\$ 39,433	\$ 4,878	\$ 816
Reclassification	\$ -	\$ (776,255)	\$ 702,552	\$ -	\$ 1,077	\$ 73,745	\$ -	\$ -	\$ -	\$ -	\$ (197)	\$ -	\$ -	\$ -
Total Expenditures	\$ 0	\$ 759,095	\$ 856,114	\$ 793,425	\$ 27,626	\$ 239,885	\$ 134,154	\$ 42,806	\$ 41,998	\$ 312,112	\$ 53,740	\$ 609,706	\$ 74,299	\$ 12,658
Funding Over/(under) expenditures	\$ 0	\$ 18,838	\$ 14,054	\$ (64,914)	\$ 18,312	\$ 8,634	\$ 521	\$ (332)	\$ (463)	\$ (6,900)	\$ 53,740	\$ 22,778	\$ (4,099)	\$ 592
YTD % of Budgeted Funds Expended		90.91%	61.66%	84.22%	16.20%	107.18%	51.36%	71.96%	71.94%	67.64%	71.65%	70.92%	92.87%	31.19%

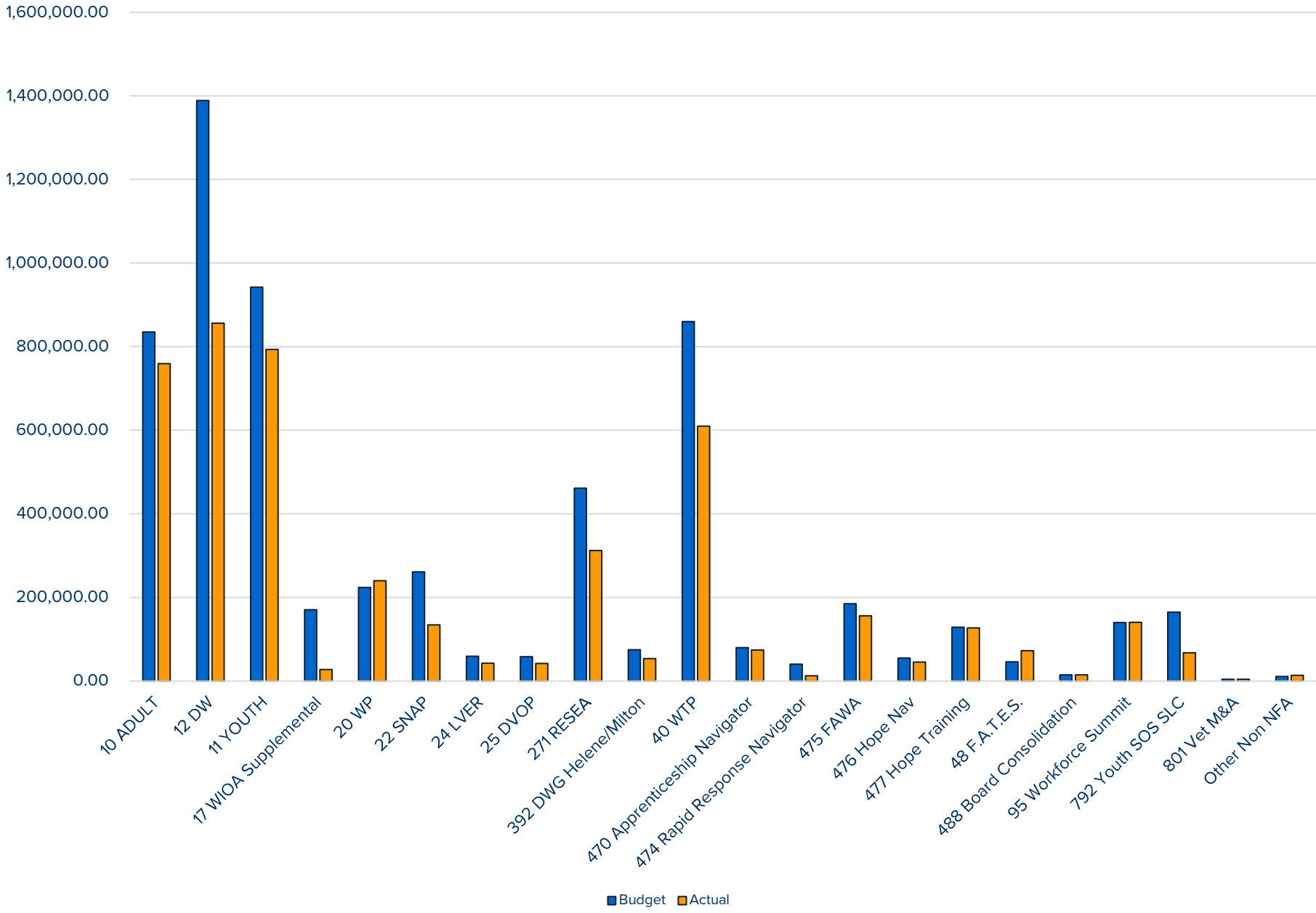
LWDB 20
Summary of Funding and Expenditures
as of May 31, 2025

PY 24-25 TOTAL AVAILABLE FUNDING	475 FAWA	476 Hope Nav	477 Hope Training	48 F.A.T.E.S.	488 Board Consolidation	801 Vet M&A	95 Workforce Summit	792 Youth SOS SLC	Other Non NFA	YEAR TO DATE TOTALS			
PY 24-25 Allocations	\$ -	\$ 54,062	\$ 25,000	\$ -	\$ 15,000	\$ 4,008	\$ 140,000	\$ -	\$ -		\$ 5,658,689		
PY 24-25 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 164,384		
Additional Funds/Incentives	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -		
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ (510,604)		
Carryforward to PY 25-26	\$ (794,777)	\$ (29,278)	\$ -	\$ (89,054)	\$ -	\$ -	\$ -	\$ -	\$ -		\$ (2,564,736)		
Carryforward from PY 23-24	\$ 979,600	\$ 30,000	\$ 104,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 3,127,585		
Total DEO Grant Funding	\$ 184,823	\$ 54,784	\$ 129,000	\$ (89,054)	\$ 15,000	\$ 4,008	\$ 140,000	\$ -	\$ -		\$ 5,894,265		
OTHER NON DEO REVENUES	\$ -	\$ -	\$ -	\$ 135,000	\$ -	\$ -	\$ -	\$ 165,000	\$ 10,757		\$ 310,757		
TOTAL	\$ 184,823	\$ 54,784	\$ 129,000	\$ 45,946	\$ 15,000	\$ 4,008	\$ 140,000	\$ 165,000	\$ 10,757	\$ -	\$ 6,205,022		
FUNDING DRAWN DOWN YTD	475 FAWA	476 Hope Nav	477 Hope Training	48 F.A.T.E.S.	488 Board Consolidation	801 Vet M&A	95 Workforce Summit	792 Youth SOS SLC	Other Non NFA	PY 24-25 Actual	PY 24-25 Budget	VARIANCE	% Expended
PY 24-25 Allocations	\$ -	\$ 5,206	\$ 19,065	\$ -	\$ 15,000	\$ 4,008	\$ 139,434	\$ -	\$ -	\$ 2,083,300	\$ 5,658,689	\$ 3,575,389	36.816%
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	\$ 155,463	\$ 30,000	\$ 104,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,353,517	\$ 3,127,585		
Total DEO Grant Funding	\$ 155,463	\$ 35,206	\$ 123,065	\$ -	\$ 15,000	\$ 4,008	\$ 139,434	\$ -	\$ -	\$ 4,436,817	\$ 5,894,265		
OTHER NON DEO REVENUES	\$ -	\$ -	\$ -	\$ 135,239	\$ -	\$ -	\$ -	\$ 128,925	\$ 30,641	\$ 294,806	\$ 310,757	\$ 15,951	94.867%
TOTAL	\$ 155,463	\$ 35,206	\$ 123,065	\$ 135,239	\$ 15,000	\$ 8,016	\$ 139,434	\$ 128,925	\$ 30,641	\$ 4,731,623	\$ 6,205,022	\$ 1,473,400	76.255%
% of Total Budgeted Funding Received	84.11%	64.26%	95.40%	294.34%	100.00%	200.00%	99.60%	78.14%	284.85%	76.25%			
EXPENDITURES										PY 24-25 Actual	PY 24-25 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ 22,609	\$ 6,551	\$ 18,113	\$ 10,824	\$ 2,335	\$ -	\$ 21,009	\$ 9,979	\$ 2,001	\$ 561,307	\$ 674,672	\$ 113,011	83.20%
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 409,326	\$ 511,554	\$ 102,228	80.02%
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 151,981	\$ 163,118	\$ 11,137	93.17%
Allocated Indirect Costs	\$ 22,609	\$ 6,551	\$ 18,113	\$ 10,824	\$ 2,393	\$ -	\$ 21,009	\$ 9,979	\$ 2,001	\$ 177	\$ 0	\$ (177)	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ (58)	\$ -	\$ -	\$ -	\$ -	\$ (177)	\$ -	\$ (177)	
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Program Training	\$ 133,108	\$ 38,550	\$ 108,685	\$ 61,800	\$ 12,665	\$ 4,008	\$ 119,288	\$ 57,686	\$ 11,652	\$ 4,037,176	\$ 5,473,288	\$ 1,436,112	73.8%
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 678,410	\$ 800,000	\$ 121,590	84.8%
Salaries and Benefits	\$ 58,600	\$ 29,336	\$ 79,436	\$ 4,771	\$ -	\$ -	\$ -	\$ 3,345	\$ 4,502	\$ 1,756,811	\$ 2,386,589	\$ 629,778	73.6%
Contract Labor	\$ 1,180	\$ 68	\$ 867	\$ 46	\$ -	\$ -	\$ -	\$ 6,936	\$ -	\$ 97,870	\$ 16,903	\$ (80,967)	579.0%
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,525	\$ 12,126	\$ 4,601	62.1%
Support Services Non-ITA	\$ -	\$ -	\$ 104	\$ 25	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,253	\$ 10,600	\$ 7,347	30.7%
Support Services ITA	\$ -	\$ -	\$ 275	\$ 5,878	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 49,371	\$ 11,500	\$ (37,871)	429.3%
Training-ITA/OST/TAA	\$ -	\$ -	\$ 669	\$ 44,999	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 351,784	\$ 290,957	\$ (60,827)	120.9%
Training-OJT	\$ -	\$ -	\$ 2,276	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 194,588	\$ 304,638	\$ 110,050	63.9%
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	\$ 573	\$ 76	\$ 1,092	\$ 15	\$ -	\$ -	\$ -	\$ 134	\$ 218	\$ 20,732	\$ 33,500	\$ 12,768	61.9%
One Stop Shared Costs	\$ 9,830	\$ 3,912	\$ 13,911	\$ 599	\$ -	\$ -	\$ -	\$ 133	\$ -	\$ 304,892	\$ 665,167	\$ 360,275	45.8%
Other Operating Expenses	\$ 52,648	\$ 2,180	\$ 1,823	\$ 547	\$ 12,500	\$ 4,008	\$ 109,739	\$ 3,657	\$ 6,023	\$ 505,048	\$ 762,562	\$ 257,514	66.2%
Allocated Program Indirect	\$ 10,276	\$ 2,978	\$ 8,233	\$ 4,920	\$ 1,088	\$ -	\$ 9,549	\$ 4,536	\$ 910	\$ 0	\$ 3,324	\$ -	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ (923)	\$ -	\$ -	\$ -	\$ -	\$ 0	\$ -	\$ 0	
Total Expenditures	\$ 155,717	\$ 45,102	\$ 126,799	\$ 72,624	\$ 15,000	\$ 4,008	\$ 140,297	\$ 67,664	\$ 13,653	\$ 4,598,483	\$ 6,147,960	\$ 1,549,122	74.8%
Funding Over/(under) expenditures	\$ (254)	\$ (9,896)	\$ (3,734)	\$ 62,614	\$ -	\$ 4,008	\$ (863)	\$ 61,261	\$ 16,988	\$ 133,140			
YTD % of Budgeted Funds Expended	84.25%	82.33%	98.29%	158.06%	100.00%	100.00%	100.21%	41.01%	126.93%	74.11%			

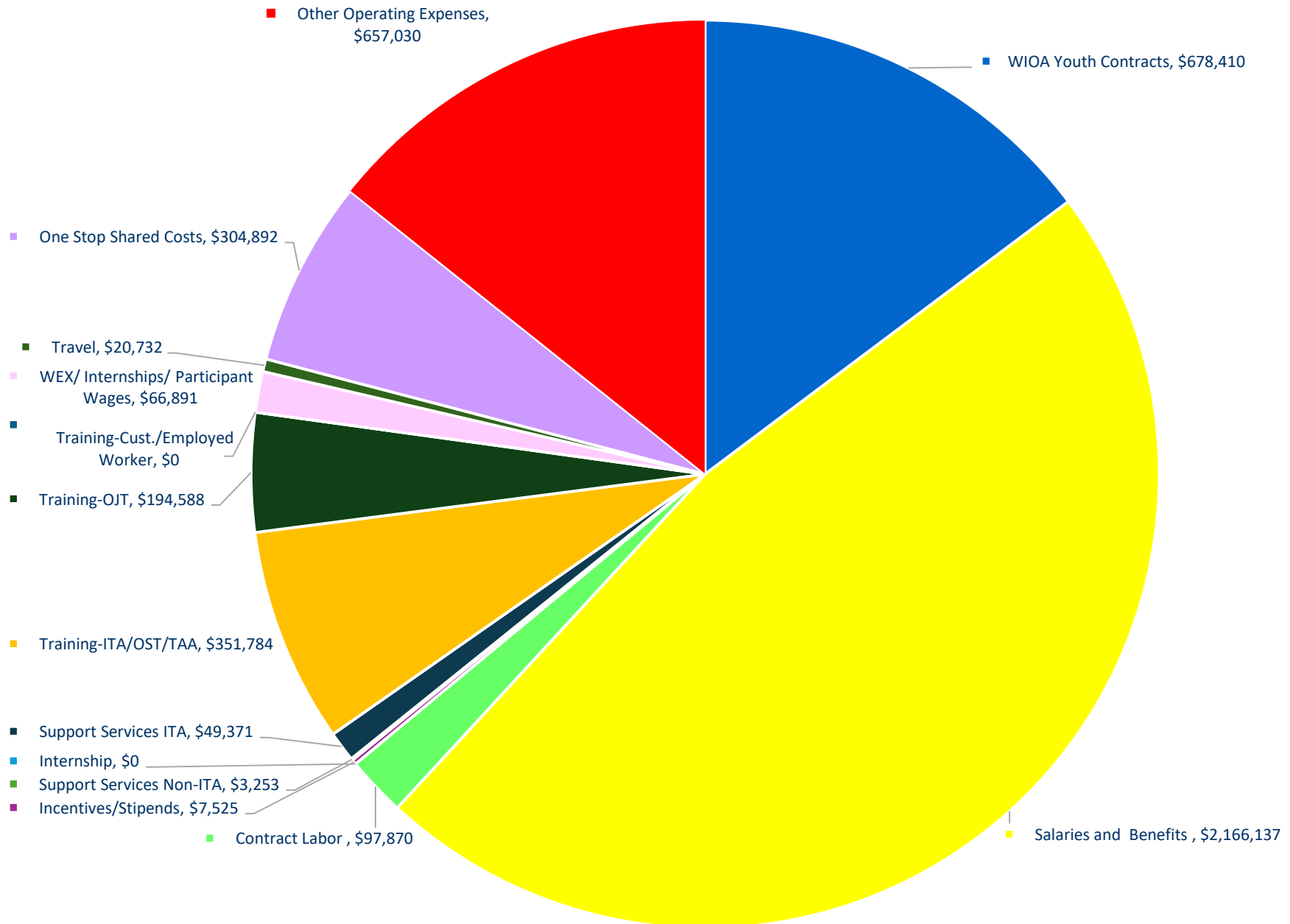
Expenditures by Category



Budget to Actual by Program



Expenditure Categories



Workforce Development Board of the Treasure Coast, Inc.
Statement of Financial Position
As of 5/31/2025

Assets

Current assets

Cash - Accounts Payable	5,212.59
Cash - Payroll	25,682.46
Cash - Business Checking W/Int.	442,825.70
Accounts Receivable Customers	2,961.03
Accounts Receivable - Other	534.48
Prepaid Expenses	74,396.85
Deposits	11,367.08
Due TO/ Due FROM	4,215.19

Total Current assets 567,195.38

Non-current assets

Data Processing Equipment	119,215.39
Vehicles	447,386.10
Lease Assets - Building	3,719,789.00
Lease Assets - Equipment	248,370.00
Leasehold Improvements	217,855.62
Accumulated Depreciation	(711,185.63)
Accumulated Amortization	(1,515,593.00)
Other Assets	24,240.00

Total Non-current assets 2,550,077.48

Total Assets **3,117,272.86**

Liabilities & Net Assets

Current Liabilities

Accounts Payable	49,052.02
Accrued Expenses	70,003.19
Federal Withholding Tax	(2,107.94)
FICA Payable	2,108.53
SUTA Payable	34.44
Principal Insurance	256.77
Health Insurance Payable	1,990.24
AFLAC Payable	77.92
Legal Shield	95.73
Workers Comp Payable	5,944.22
Accrued Leave	101,681.04
Lease Interest Payable	5,257.00
Refundable Advances	1,935.77
Deferred Revenue	2,755.00

Total Current Liabilities 239,083.93

Non-current liabilities

Short-term Lease Liability	316,523.00
Long-term Lease Liability	2,650,628.00
Lease Liability Offset	(316,523.00)

Total Non-current liabilities 2,650,628.00

Net Assets

Beginning of Year	1,032,582.20
Current Year	(805,021.27)
Total Net Assets	227,560.93

Total Liabilities & Net Assets **3,117,272.86**

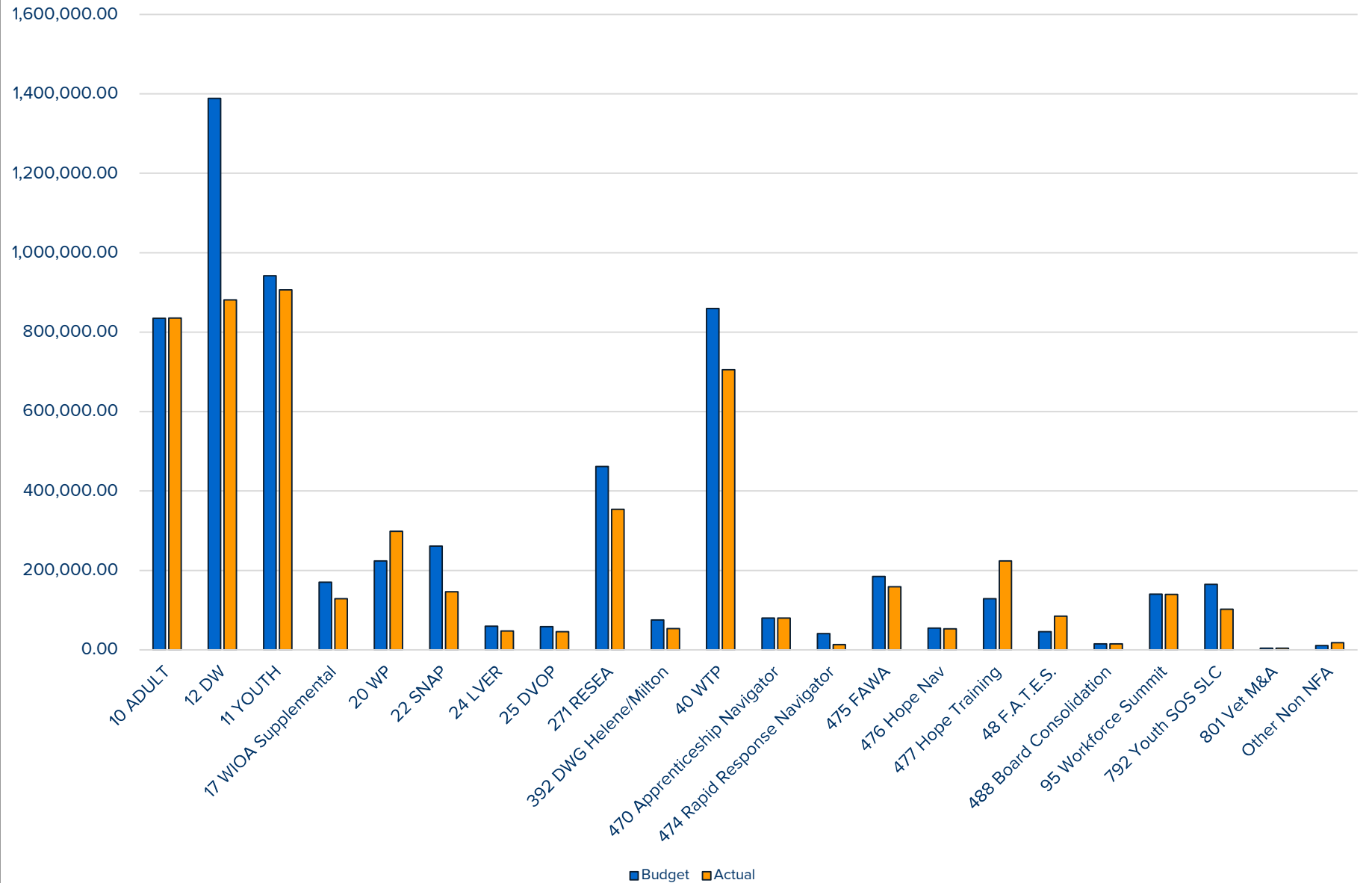
LWDB 20
Summary of Funding and Expenditures
as of June 30, 2025

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		\$ 827,277	\$ 759,632	\$ 684,294	\$ 170,532	\$ 735,532	\$ 215,022	\$ 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)	\$ -	\$ (197,111)	\$ (93,026)	\$ (8,699)	\$ (41,090)	\$ (114,078)	\$ -	\$ (369,333)	\$ -	\$ -
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		\$ 835,303	\$ 1,400,703	\$ 942,032	\$ 170,532	\$ 298,556	\$ 198,496	\$ 59,485	\$ 58,379	\$ 368,715	\$ 75,000	\$ 859,699	\$ 80,000	\$ 23,800
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ -	\$ 835,303	\$ 1,400,703	\$ 942,032	\$ 170,532	\$ 298,556	\$ 198,496	\$ 59,485	\$ 58,379	\$ 368,715	\$ 75,000	\$ 859,699	\$ 80,000	\$ 23,800
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		\$ 827,277	\$ 20,100	\$ 311,435	\$ 128,480	\$ 197,441	\$ 69,761	\$ 26,847	\$ 21,417	\$ 231,326	\$ 53,740	\$ 439,885	\$ 80,000	\$ 12,950
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	\$ 861,128	\$ 595,000	\$ -	\$ 101,125	\$ 76,500	\$ 20,463	\$ 24,529	\$ 122,540	\$ -	\$ 265,803	\$ -	\$ -
Total DEO Grant Funding		\$ 835,303	\$ 881,228	\$ 906,435	\$ 128,480	\$ 298,566	\$ 146,261	\$ 47,310	\$ 45,946	\$ 353,866	\$ 53,740	\$ 705,688	\$ 80,000	\$ 12,950
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL		\$ 835,303	\$ 881,228	\$ 906,435	\$ 128,480	\$ 298,566	\$ 146,261	\$ 47,310	\$ 45,946	\$ 353,866	\$ 53,740	\$ 705,688	\$ 80,000	\$ 12,950
% of Total Budgeted Funding Received		100.00%	62.91%	96.22%	75.34%	100.00%	73.68%	79.53%	78.70%	95.97%	71.65%	82.09%	100.00%	54.41%
EXPENDITURES														
Administrative	\$ -	\$ 82,904	\$ 90,995	\$ 17,845	\$ 36,576	\$ 112,902	\$ 21,052	\$ 5,464	\$ 5,278	\$ 51,005	\$ 8,202	\$ 101,975	\$ 11,612	\$ 1,855
Salaries and Benefits	\$ 499,719	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 155,592	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (655,312)	\$ 280,793	\$ 15,218	\$ 17,845	\$ -	\$ 12,631	\$ 21,052	\$ 5,464	\$ 5,278	\$ 51,005	\$ 8,099	\$ 101,975	\$ 13,989	\$ 1,855
Reclassification	\$ -	\$ (197,889)	\$ 75,777	\$ -	\$ 36,576	\$ 100,271	\$ -	\$ -	\$ -	\$ -	\$ 103	\$ -	\$ (2,377)	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ 752,399	\$ 790,233	\$ 888,590	\$ 91,904	\$ 185,664	\$ 125,209	\$ 41,846	\$ 40,668	\$ 302,861	\$ 45,538	\$ 603,713	\$ 68,388	\$ 11,094
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 782,390	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 251,677	\$ 759,729	\$ 35,254	\$ 16,758	\$ -	\$ 27,564	\$ 85,822	\$ 6,161	\$ 6,960	\$ 210,346	\$ 3,749	\$ 345,789	\$ 63,416	\$ 8,696
Contract Labor	\$ -	\$ 7,866	\$ 358	\$ -	\$ -	\$ 47	\$ 5,876	\$ 19	\$ 28	\$ 20,671	\$ 10,000	\$ 48,242	\$ 279	\$ 93
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,050	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ 1,422	\$ 36	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,416	\$ -	\$ -
Support Services ITA	\$ -	\$ 47,209	\$ 1,959	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 100	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ 317,887	\$ 27,144	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,595	\$ -	\$ -
Training-OJT	\$ -	\$ 203,229	\$ 6,486	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 27,946	\$ -	\$ -	\$ -
Travel	\$ 1,357	\$ 4,329	\$ 188	\$ 601	\$ -	\$ 681	\$ 1,185	\$ 5,120	\$ 2,460	\$ 1,170	\$ 5	\$ 2,779	\$ 455	\$ 52
One Stop Shared Costs	\$ -	\$ 84,100	\$ 3,674	\$ -	\$ -	\$ 43,076	\$ 12,809	\$ 25,862	\$ 26,546	\$ 34,495	\$ 359	\$ 53,821	\$ 8,437	\$ 1,021
Other Operating Expenses	\$ 36,210	\$ 75,290	\$ 5,865	\$ 80,965	\$ -	\$ 16,518	\$ 10,225	\$ 2,273	\$ 2,344	\$ 13,666	\$ 28	\$ 95,910	\$ 2,660	\$ 414
Allocated Program Indirect	\$ (289,245)	\$ 123,938	\$ 6,717	\$ 7,877	\$ -	\$ 5,575	\$ 9,292	\$ 2,412	\$ 2,329	\$ 22,513	\$ 3,575	\$ 45,010	\$ 6,174	\$ 819
Reclassification	\$ -	\$ (872,599)	\$ 702,552	\$ -	\$ 91,904	\$ 92,203	\$ -	\$ -	\$ -	\$ -	\$ (124)	\$ -	\$ (13,035)	\$ -
Total Expenditures	\$ 0	\$ 835,303	\$ 881,228	\$ 906,435	\$ 128,480	\$ 298,566	\$ 146,261	\$ 47,310	\$ 45,946	\$ 353,866	\$ 53,740	\$ 705,688	\$ 80,000	\$ 12,950
Funding Over/(under) expenditures	\$ 0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
YTD % of Budgeted Funds Expended		100.00%	62.91%	96.22%	75.34%	100.00%	73.68%	79.53%	78.70%	95.97%	71.65%	82.09%	100.00%	54.41%

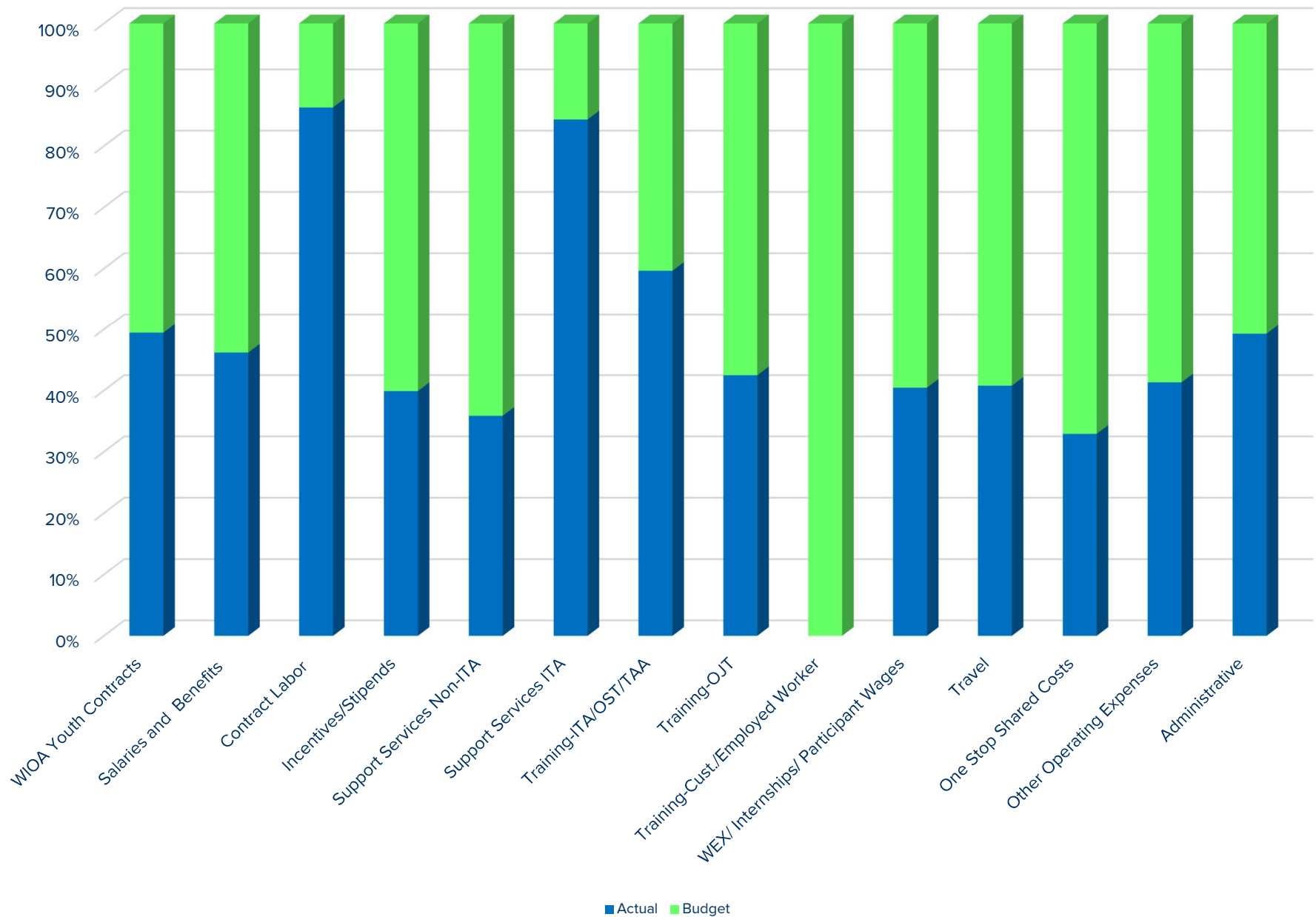
LWDB 20
Summary of Funding and Expenditures
as of June 30, 2025

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	\$ -	\$ 96,919	\$ 135,373	\$ -	\$ 15,000	\$ 4,008	\$ 140,000	\$ -	\$ -		\$ 5,703,146		
PY 24-25 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 164,384		
Additional Funds/Incentives	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -		
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ (510,604)		
Carryforward to PY 25-26	\$ -	\$ (29,278)	\$ -	\$ (89,054)	\$ -	\$ -	\$ -	\$ -	\$ -		\$ (1,602,244)		
Carryforward from PY 23-24	\$ 229,600	\$ 30,000	\$ 104,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 2,377,585		
Total DEO Grant Funding	\$ 229,600	\$ 97,641	\$ 239,373	\$ (89,054)	\$ 15,000	\$ 4,008	\$ 140,000	\$ -	\$ -		\$ 6,007,267		
OTHER NON DEO REVENUES	\$ -	\$ -	\$ -	\$ 135,000	\$ -	\$ -	\$ -	\$ 165,000	\$ 10,757		\$ 310,757		
TOTAL	\$ 229,600	\$ 97,641	\$ 239,373	\$ 45,946	\$ 15,000	\$ 4,008	\$ 140,000	\$ 165,000	\$ 10,757	\$ -	\$ 6,318,024		
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	\$ -	\$ 22,719	\$ 119,661	\$ -	\$ 15,000	\$ 4,008	\$ 139,434	\$ -	\$ -	\$ 2,721,482	\$ 5,703,146	\$ 2,981,663	47.719%
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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (1,602,244)	\$ (1,602,244)	
Carryforward from PY 23-24	\$ 159,006	\$ 30,000	\$ 104,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,368,119	\$ 2,377,585		
Total DEO Grant Funding	\$ 159,006	\$ 52,719	\$ 223,661	\$ -	\$ 15,000	\$ 4,008	\$ 139,434	\$ -	\$ -	\$ 5,089,602	\$ 6,007,267		
OTHER NON DEO REVENUES	\$ -	\$ -	\$ -	\$ 84,778	\$ -	\$ -	\$ -	\$ 102,138	\$ 32,216	\$ 219,132	\$ 310,757	\$ 91,625	70.516%
TOTAL	\$ 159,006	\$ 52,719	\$ 223,661	\$ 84,778	\$ 15,000	\$ 4,008	\$ 139,434	\$ 102,138	\$ 32,216	\$ 5,308,734	\$ 6,318,024	\$ 1,009,290	84.025%
% of Total Budgeted Funding Received	69.25%	53.99%	93.44%	184.52%	100.00%	100.00%	99.60%	61.90%	299.49%	84.03%			
EXPENDITURES										PY 24-25 Actual	PY 24-25 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ 23,310	\$ 7,747	\$ 22,329	\$ 12,758	\$ 2,335	\$ -	\$ 21,205	\$ 15,273	\$ 2,690	\$ 655,312	\$ 674,672	\$ 19,361	97.13%
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 499,719	\$ 511,554	\$ 11,835	97.69%
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 155,592	\$ 163,118	\$ 7,526	95.39%
Allocated Indirect Costs	\$ 23,310	\$ 7,747	\$ 34,709	\$ 12,758	\$ 2,415	\$ -	\$ 21,205	\$ 15,273	\$ 2,690	\$ (0)	\$ 0	\$ 0	
Reclassification	\$ -	\$ -	\$ (12,380)	\$ -	\$ (81)	\$ -	\$ -	\$ -	\$ -	\$ 0	\$ -	\$ 0	
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Program Training	\$ 135,696	\$ 44,972	\$ 201,332	\$ 72,019	\$ 12,665	\$ 4,008	\$ 118,230	\$ 86,865	\$ 15,410	\$ 4,639,307	\$ 5,473,288	\$ 833,981	84.8%
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 782,390	\$ 800,000	\$ 17,610	97.8%
Salaries and Benefits	\$ 60,335	\$ 34,768	\$ 111,743	\$ 5,934	\$ -	\$ -	\$ -	\$ 7,377	\$ 5,792	\$ 2,047,869	\$ 2,386,589	\$ 338,720	85.8%
Contract Labor	\$ 1,180	\$ 68	\$ 867	\$ 46	\$ -	\$ -	\$ -	\$ 10,802	\$ -	\$ 106,441	\$ 16,903	\$ (89,538)	629.7%
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,050	\$ 12,126	\$ 4,076	66.4%
Support Services Non-ITA	\$ -	\$ -	\$ 2,030	\$ 25	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,929	\$ 10,600	\$ 4,671	55.9%
Support Services ITA	\$ -	\$ -	\$ 5,750	\$ 6,858	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 61,876	\$ 11,500	\$ (50,376)	538.1%
Training-ITA/OST/TAA	\$ -	\$ -	\$ 31,330	\$ 52,229	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 430,185	\$ 290,957	\$ (139,228)	147.9%
Training-OJT	\$ 653	\$ -	\$ 14,620	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 224,987	\$ 304,638	\$ 79,650	73.9%
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 50,000	\$ 50,000	0.0%
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 57,264	\$ -	\$ 85,211	\$ 125,421	\$ 40,210	67.9%
Travel	\$ 579	\$ 95	\$ 1,191	\$ 18	\$ -	\$ -	\$ -	\$ 461	\$ 337	\$ 23,064	\$ 33,500	\$ 10,436	68.8%
One Stop Shared Costs	\$ 10,006	\$ 4,425	\$ 16,576	\$ 691	\$ -	\$ -	\$ -	\$ 392	\$ 52	\$ 326,342	\$ 665,167	\$ 338,825	49.1%
Other Operating Expenses	\$ 52,654	\$ 1,906	\$ 1,906	\$ 588	\$ 12,500	\$ 4,008	\$ 108,870	\$ 3,827	\$ 8,042	\$ 536,961	\$ 762,562	\$ 225,601	70.4%
Allocated Program Indirect	\$ 10,289	\$ 3,420	\$ 15,320	\$ 5,631	\$ 1,066	\$ -	\$ 9,359	\$ 6,741	\$ 1,187	\$ (0)	\$ 3,324	\$ -	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ (901)	\$ -	\$ -	\$ -	\$ -	\$ 0	\$ -	\$ 0	
Total Expenditures	\$ 159,006	\$ 52,719	\$ 223,661	\$ 84,778	\$ 15,000	\$ 4,008	\$ 139,434	\$ 102,138	\$ 18,100	\$ 5,294,618	\$ 6,147,960	\$ 853,342	86.1%
Funding Over/(under) expenditures	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 14,116	\$ 14,116			
YTD % of Budgeted Funds Expended	69.25%	53.99%	93.44%	184.52%	100.00%	100.00%	99.60%	61.90%	168.27%	83.80%			

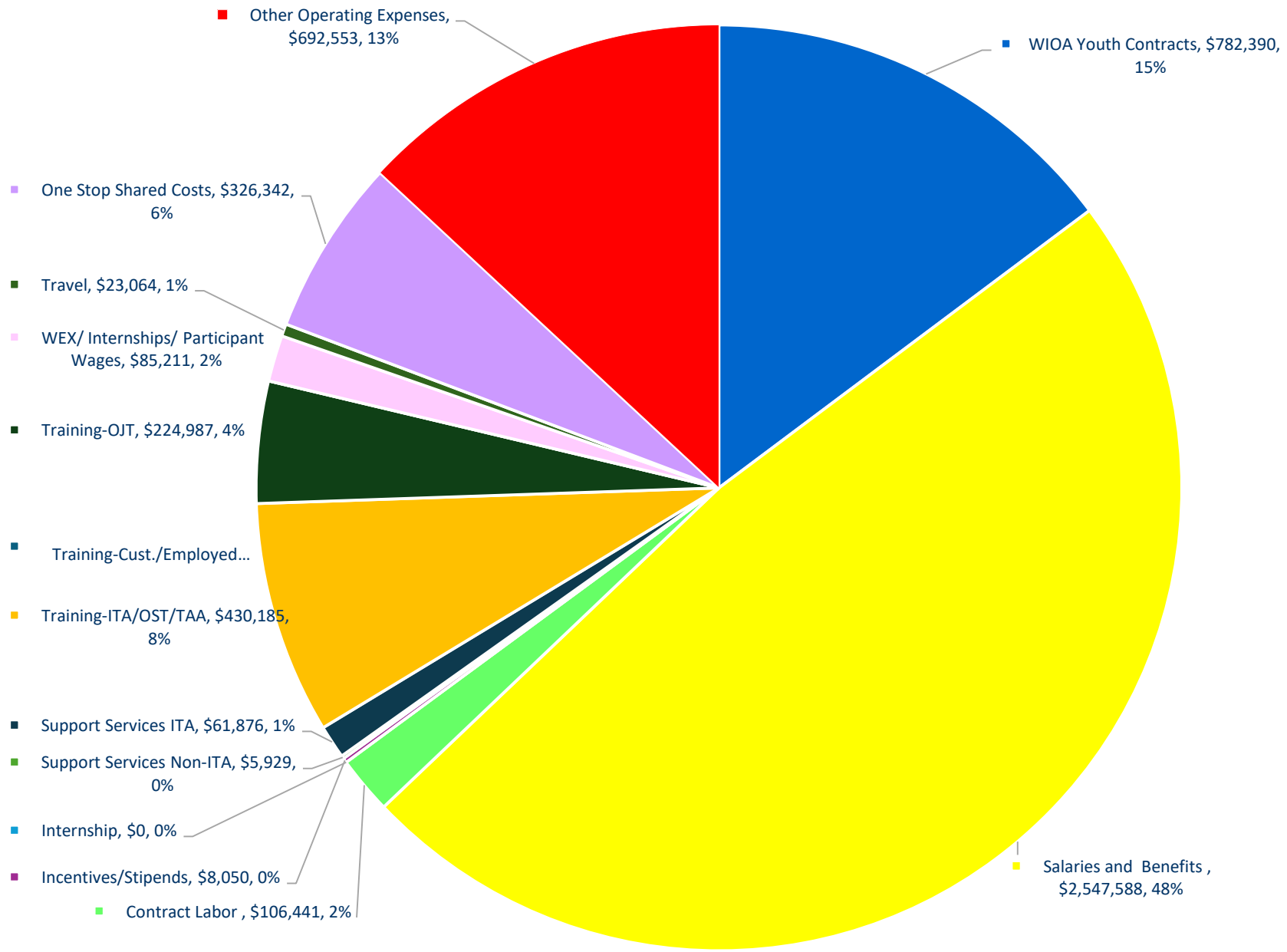
Budget to Actual by Program



Expenditures by Category



Expenditure Categories



Workforce Development Board of the Treasure Coast, Inc.
Statement of Financial Position
As of 6/30/2025

	Current Year
Assets	
Current assets	
Cash - Accounts Payable	5,212.59
Cash - Payroll	30,603.08
Cash - Business Checking W/Int.	559,030.21
Accounts Receivable Customers	111.03
Accounts Receivable - Other	534.48
Grants Receivable	188,150.96
Prepaid Expenses	71,026.06
Deposits	4,765.71
Due TO/ Due FROM	6,347.76
Total Current assets	865,781.88
Non-current assets	
Data Processing Equipment	119,215.39
Vehicles	447,386.10
Lease Assets - Building	3,719,789.00
Lease Assets - Equipment	248,370.00
Leasehold Improvements	217,855.62
Accumulated Depreciation	(711,185.63)
Accumulated Amortization	(1,515,593.00)
Other Assets	24,240.00
Total Non-current assets	2,550,077.48
Total Assets	<u>3,415,859.36</u>
Liabilities & Net Assets	
Current Liabilities	
Accounts Payable	193,656.10
Payroll Accounts Payable	1,407.73
Accrued Expenses	125,163.70
Federal Withholding Tax	6,518.25
FICA Payable	15,147.58
SUTA Payable	36.49
Principal Insurance	2,115.45
Difference Card Fees	1,376.70
Health Insurance Payable	22,489.30
AFLAC Payable	1,000.18
Legal Shield	464.83
Workers Comp Payable	6,104.10
Retirement Withholding	6,551.29
Other Benefits Payable	754.11
Salaries Payable	64,178.15
Accrued Leave	82,414.91
Lease Interest Payable	5,257.00
Refundable Advances	100,892.33
Deferred Revenue	1,900.00
Total Current Liabilities	637,428.20
Non-current liabilities	
Short-term Lease Liability	316,523.00
Long-term Lease Liability	2,650,628.00
Lease Liability Offset	(316,523.00)
Total Non-current liabilities	2,650,628.00
Net Assets	
Beginning of Year	1,032,582.20
Current Year	(904,779.04)
Total Net Assets	127,803.16
Total Liabilities & Net Assets	<u>3,415,859.36</u>

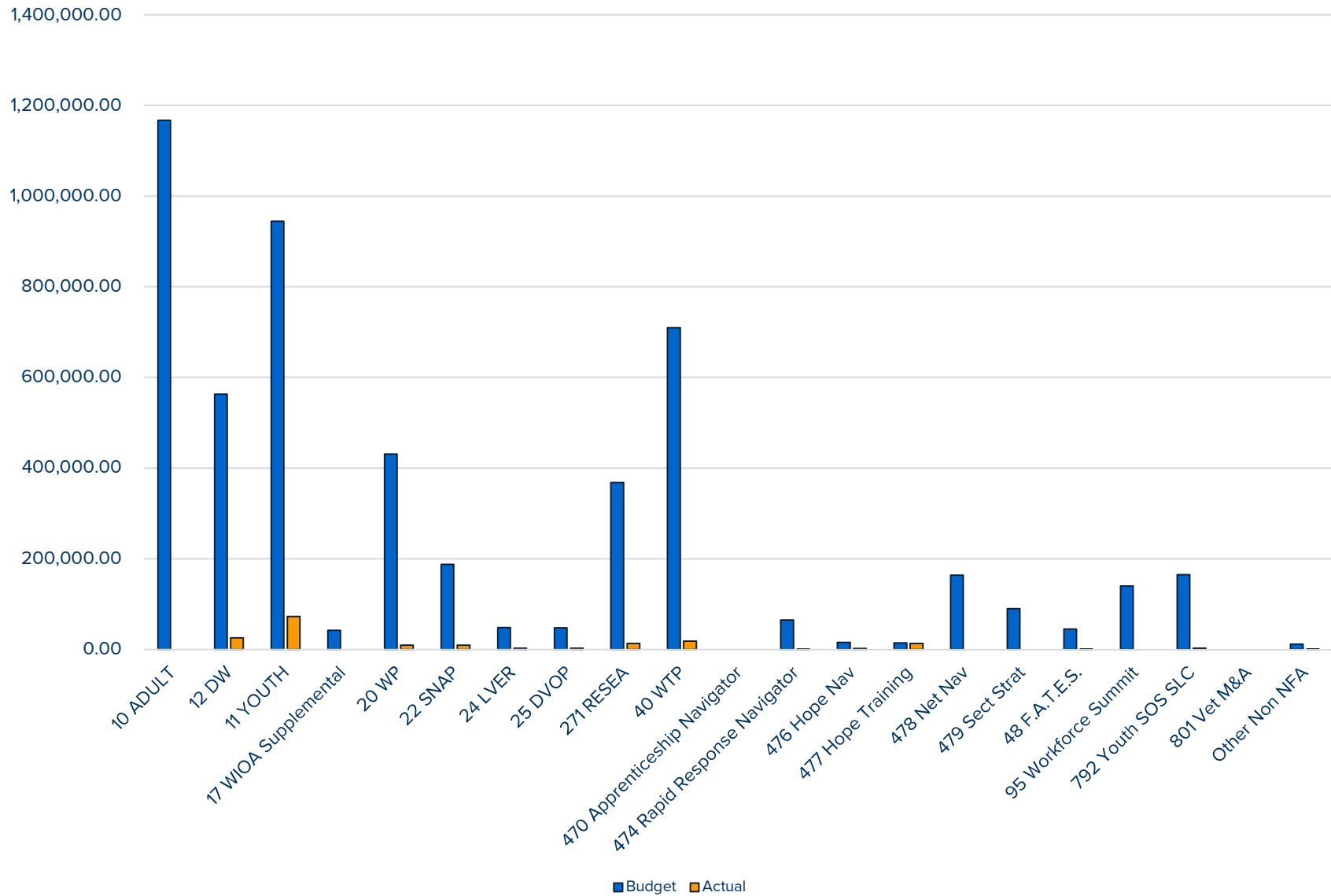
LWDB 20
Summary of Funding and Expenditures
As of July 31, 2025

PY 24-25 TOTAL AVAILABLE FUNDING	INDIRECT	10 ADULT	12 DW	11 YOUTH	17 WIOA Supplemental	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	40 WTP	470 Apprent Navigator	474 Rapid Response Navigator	476 Hope Navigator	477 Hope Training
PY 25-26 Allocations		\$ 1,167,001	\$ 667,134	\$ 949,630	\$ -	\$ 804,045	\$ 231,203	\$ 214,646	\$ 202,538	\$ 298,261	\$ 1,043,690	\$ -	\$ 65,000	\$ -	\$ -
PY 25-26 Supplemental		\$ -	\$ 121,430	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ (345,868)	\$ -	\$ (172,980)	\$ (158,757)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 26-27		\$ -	\$ (1,088,896)	\$ (327,261)	\$ -	\$ (327,591)	\$ (161,540)	\$ -	\$ -	\$ (65,846)	\$ (545,320)	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 24-25		\$ -	\$ 863,556	\$ 322,276	\$ 42,052	\$ 300,430	\$ 118,136	\$ 6,577	\$ 4,248	\$ 135,698	\$ 211,255	\$ -	\$ -	\$ 15,831	\$ 14,620
Total DEO Grant Funding		\$ 1,167,001	\$ 563,224	\$ 944,645	\$ 42,052	\$ 431,016	\$ 187,799	\$ 48,243	\$ 48,029	\$ 368,113	\$ 709,625	\$ -	\$ 65,000	\$ 15,831	\$ 14,620
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ -	\$ 1,167,001	\$ 563,224	\$ 944,645	\$ 42,052	\$ 431,016	\$ 187,799	\$ 48,243	\$ 48,029	\$ 368,113	\$ 709,625	\$ -	\$ 65,000	\$ 15,831	\$ 14,620
FUNDING DRAWN DOWN YTD	INDIRECT	10 ADULT	12 DW	11 YOUTH	17 WIOA Supplemental	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	40 WTP	470 Apprent Navigator	474 Rapid Response Navigator	476 Hope Navigator	477 Hope Training
PY 25-26 Allocations		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 300	\$ -	\$ -
PY 25-26 Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 26-27		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 24-25		\$ -	\$ 93,940	\$ (46,227)	\$ 108	\$ (30,047)	\$ 5,514	\$ 821	\$ 1,516	\$ 15,545	\$ (17,204)	\$ -	\$ -	\$ 4,386	\$ (9,596)
Total DEO Grant Funding		\$ -	\$ 93,940	\$ (46,227)	\$ 108	\$ (30,047)	\$ 5,514	\$ 821	\$ 1,516	\$ 15,545	\$ (17,204)	\$ -	\$ 300	\$ 4,386	\$ (9,596)
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL		\$ -	\$ 93,940	\$ (46,227)	\$ 108	\$ (30,047)	\$ 5,514	\$ 821	\$ 1,516	\$ 15,545	\$ (17,204)	\$ -	\$ 300	\$ 4,386	\$ (9,596)
% of Total Budgeted Funding Received		0.00%	16.68%	-4.89%	0.26%	-6.97%	2.94%	1.70%	3.16%	4.22%	-2.42%	#DIV/0!	0.46%	27.71%	0.00%
EXPENDITURES															
Administrative	\$ -	\$ -	\$ 2,596	\$ 6,768	\$ -	\$ 1,902	\$ 1,317	\$ 219	\$ 215	\$ 1,811	\$ 2,547	\$ -	\$ 4	\$ 319	\$ 1,847
Salaries and Benefits	\$ 10,980	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 9,064	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (20,044)	\$ 3,471	\$ 125	\$ 6,768	\$ -	\$ 763	\$ 1,317	\$ 219	\$ 215	\$ 1,811	\$ 2,547	\$ 139	\$ 4	\$ 319	\$ 1,847
Reclassification	\$ -	\$ (3,471)	\$ 2,471	\$ -	\$ -	\$ 1,139	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (139)	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ -	\$ 22,721	\$ 65,920	\$ -	\$ 7,768	\$ 8,046	\$ 2,348	\$ 2,344	\$ 11,597	\$ 15,984	\$ -	\$ 32	\$ 1,993	\$ 11,760
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 50,639	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 7,930	\$ 13,041	\$ 348	\$ 2,126	\$ -	\$ 1,488	\$ 3,138	\$ 213	\$ 213	\$ 6,951	\$ 7,070	\$ 435	\$ 13	\$ 1,310	\$ 7,344
Contract Labor	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,055	\$ -	\$ -	\$ -	\$ 2,436	\$ -	\$ -	\$ -	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 100
Training-ITA/OST/TAA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-OJT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
One Stop Shared Costs	\$ 1,146	\$ 5,501	\$ 156	\$ 766	\$ -	\$ 4,134	\$ 1,474	\$ 1,871	\$ 1,871	\$ 3,096	\$ 3,329	\$ 532	\$ 15	\$ 468	\$ 3,053
Other Operating Expenses	\$ 2,828	\$ 1,353	\$ 186	\$ 8,369	\$ -	\$ 614	\$ 597	\$ 134	\$ 133	\$ 475	\$ 1,636	\$ 29	\$ 1	\$ 26	\$ 167
Allocated Program Indirect	\$ (11,905)	\$ 2,062	\$ 74	\$ 4,020	\$ -	\$ 453	\$ 782	\$ 130	\$ 128	\$ 1,075	\$ 1,513	\$ 83	\$ 2	\$ 189	\$ 1,097
Reclassification	\$ -	\$ (21,956)	\$ 21,956	\$ -	\$ -	\$ 1,079	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (1,079)	\$ -	\$ -	\$ -
Total Expenditures	\$ 0	\$ -	\$ 25,317	\$ 72,688	\$ -	\$ 9,670	\$ 9,363	\$ 2,567	\$ 2,559	\$ 13,408	\$ 18,530	\$ -	\$ 36	\$ 2,312	\$ 13,607
Funding Over/(under) expenditures	\$ 0	\$ -	\$ 68,623	\$ (118,916)	\$ 108	\$ (39,717)	\$ (3,849)	\$ (1,746)	\$ (1,044)	\$ 2,138	\$ (35,735)	\$ -	\$ 264	\$ 2,074	\$ (23,203)
YTD % of Budgeted Funds Expended		0.00%	4.50%	7.69%	0.00%	2.24%	4.99%	5.32%	5.33%	3.64%	2.61%	#DIV/0!	0.06%	14.60%	0.00%

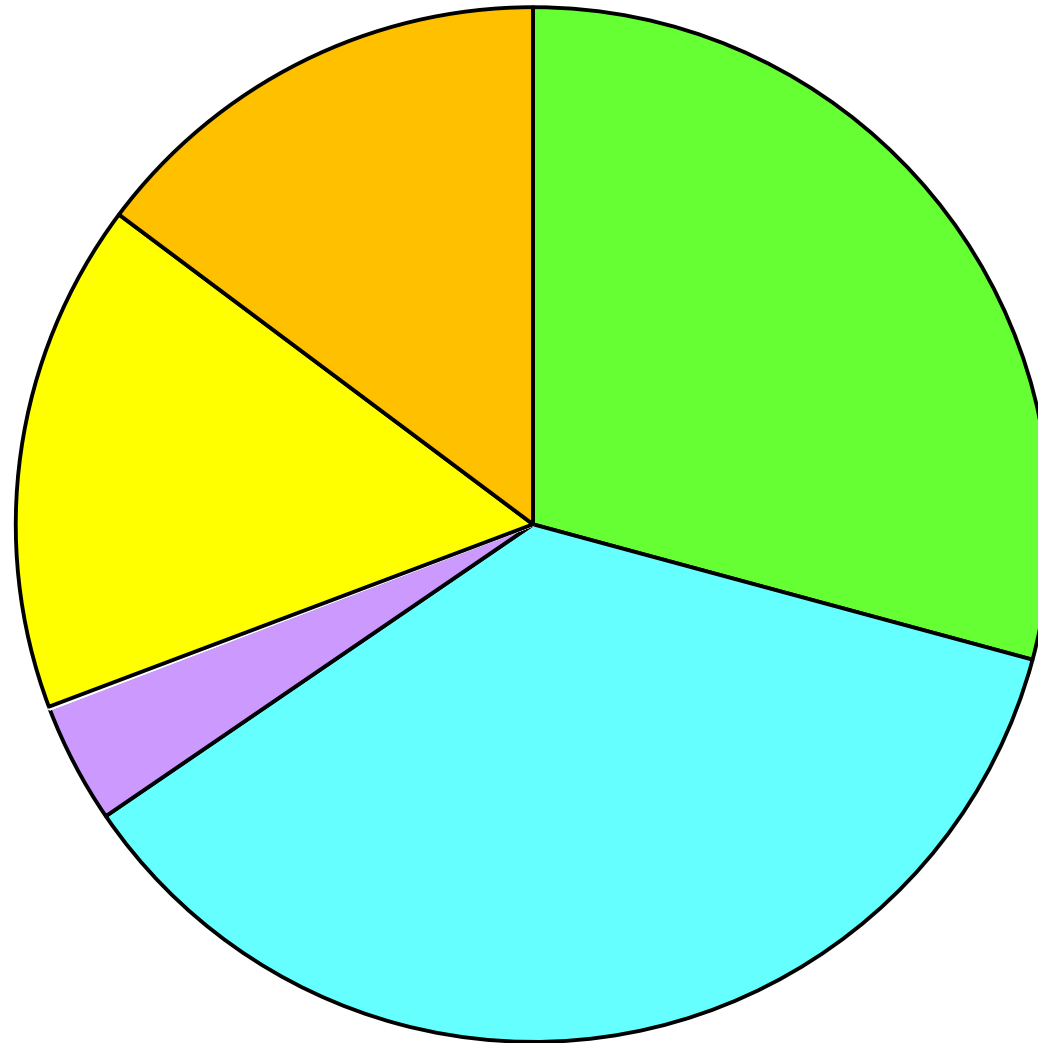
LWDB 20
Summary of Funding and Expenditures
As of July 31, 2025

PY 24-25 TOTAL AVAILABLE FUNDING	478 Network Navigators	479 Sectors of Strategic Focus	48 F.A.T.E.S.	792 Youth SOS SLC	95 Workforce Summit	Other Non NFA	YEAR TO DATE TOTALS			
PY 25-26 Allocations	\$ 163,571	\$ 90,000	\$ -	\$ -	\$ 140,000	\$ -		\$ 6,036,719		
PY 25-26 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 121,430		
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -		
Additional Funds/Incentives	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -		
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ (677,605)		
Carryforward to PY 26-27	\$ -	\$ -	\$ (5,733)	\$ -	\$ -	\$ -		\$ (2,522,187)		
Carryforward from PY 24-25	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 2,034,681		
Total DEO Grant Funding	\$ 163,571	\$ 90,000	\$ (5,733)	\$ -	\$ 140,000	\$ -		\$ 4,993,038		
OTHER NON DEO REVENUES	\$ -	\$ -	\$ 50,461	\$ 165,000	\$ -	\$ 11,547		\$ 227,008		
TOTAL	\$ 163,571	\$ 90,000	\$ 44,728	\$ 165,000	\$ 140,000	\$ 11,547	\$ -	\$ 5,220,045		
FUNDING DRAWN DOWN YTD	478 Network Navigators	479 Sectors of Strategic Focus	48 F.A.T.E.S.	792 Youth SOS SLC	95 Workforce Summit	Other Non NFA	PY 25-26 Actual	PY 25-26 Budget	VARIANCE	% Expended
PY 25-26 Allocations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 300	\$ 6,036,719	\$ 6,036,419	0.005%
PY 25-26 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 121,430	\$ 121,430	0.000%
Additional Funds/Incentives	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (677,605)	\$ (677,605)	
Carryforward to PY 26-27	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (2,522,187)	\$ (2,522,187)	
Carryforward from PY 24-25	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 18,757	\$ 2,034,681	\$ 2,015,924	0.922%
Total DEO Grant Funding	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 19,057	\$ 4,993,038	\$ 4,973,981	0.382%
OTHER NON DEO REVENUES	\$ -	\$ -	\$ 50,461	\$ 26,787	\$ -	\$ 151	\$ 77,399	\$ 227,008	\$ 149,609	34.095%
TOTAL	\$ -	\$ -	\$ 50,461	\$ 26,787	\$ -	\$ 151	\$ 96,456	\$ 5,220,045	\$ 5,123,589	1.848%
% of Total Budgeted Funding Received	0.00%	0.00%	112.82%	16.23%	0.00%	1.31%	1.85%			
EXPENDITURES							PY 25-26 Actual	PY 25-26 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ -	\$ -	\$ 39	\$ 452	\$ -	\$ 8	\$ 20,044	\$ 548,372	\$ 528,328	3.66%
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 10,980	\$ 402,460	\$ 391,480	2.73%
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 9,064	\$ 145,912	\$ 136,848	6.21%
Allocated Indirect Costs	\$ -	\$ -	\$ 39	\$ 452	\$ -	\$ 8	\$ 0	\$ (0)	\$ (0)	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0	\$ -	\$ 0	
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Program Training	\$ -	\$ -	\$ 246	\$ 2,511	\$ -	\$ 61	\$ 153,331	\$ 4,671,677	\$ 4,518,345	3.3%
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 50,639	\$ 750,000	\$ 699,361	6.8%
Salaries and Benefits	\$ -	\$ -	\$ 160	\$ 84	\$ -	\$ 26	\$ 51,891	\$ 2,228,511	\$ 2,176,620	2.3%
Contract Labor	\$ -	\$ -	\$ -	\$ 1,991	\$ -	\$ -	\$ 6,482	\$ 9,347	\$ 2,865	69.3%
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 14,198	\$ 14,198	0.0%
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 10,000	\$ 10,000	0.0%
Support Services ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 100	\$ 54,895	\$ 54,795	0.2%
Training-ITA/OST/TAA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 279,330	\$ 279,330	0.0%
Training-OJT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 320,746	\$ 320,746	0.0%
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 104,448	\$ 104,448	0.0%
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 16,190	\$ 16,190	0.0%
One Stop Shared Costs	\$ -	\$ -	\$ 59	\$ 167	\$ -	\$ 29	\$ 27,667	\$ 402,021	\$ 374,354	6.9%
Other Operating Expenses	\$ -	\$ -	\$ 3	\$ -	\$ -	\$ 1	\$ 16,552	\$ 481,990	\$ 465,438	3.4%
Allocated Program Indirect	\$ -	\$ -	\$ 23	\$ 269	\$ -	\$ 5	\$ 0	\$ 0	\$ -	
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Expenditures	\$ -	\$ -	\$ 285	\$ 2,963	\$ -	\$ 69	\$ 173,376	\$ 5,220,045	\$ 5,046,669	3.3%
Funding Over/(under) expenditures	\$ -	\$ -	\$ 50,176	\$ 23,824	\$ -	\$ 82	\$ (76,919)			
YTD % of Budgeted Funds Expended	0.00%	0.00%	0.64%	1.80%	0.00%	0.60%	3.32%			

Budget to Actual by Program



PY 25-26 Expenditures by Category



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

Workforce Development Board of the Treasure Coast, Inc.
Statement of Financial Position
As of 7/31/2025

	7/31/25
Assets	
Current assets	
Cash - Accounts Payable	5,212.59
Cash - Payroll	126,934.74
Cash - Business	242,234.15
Checking W/Int.	
Accounts Receivable	111.03
Customers	
Accounts Receivable -	534.48
Other	
Grants Receivable	2,042.64
Prepaid Expenses	47,902.85
Deposits	4,765.71
Due TO/ Due FROM	6,207.15
Total Current assets	435,945.34
Non-current assets	
Data Processing	119,215.39
Vehicles	447,386.10
Lease Assets - Building	3,719,789.00
Lease Assets -	248,370.00
Leasehold Improvements	217,855.62
Accumulated	(711,185.63)
Accumulated	(1,515,593.00)
Other Assets	24,240.00
Total Non-current assets	2,550,077.48
Total Assets	<u>2,986,022.82</u>
Liabilities & Net Assets	
Current Liabilities	
Accounts Payable	133,851.69
Accrued Expenses	50,433.64
Federal Withholding Tax	(2,107.94)
FICA Payable	2,108.53
SUTA Payable	37.99
Principal Insurance	256.77
Health Insurance Payable	1,220.33
AFLAC Payable	1,000.18
Legal Shield	495.48
Workers Comp Payable	5,944.22
Accrued Leave	80,222.32
Sick Leave Liability	44,265.49
Lease Interest Payable	5,257.00
Refundable Advances	1,935.77
Deferred Revenue	1,662.50
Total Current Liabilities	326,583.97
Non-current liabilities	
Short-term Lease Liability	316,523.00
Long-term Lease Liability	2,650,628.00
Lease Liability Offest	(316,523.00)
Total Non-current liabilities	2,650,628.00
Net Assets	
Beginning of Year	1,032,582.20
Current Year	(1,023,771.35)
Total Net Assets	8,810.85
Total Liabilities & Net Assets	<u>2,986,022.82</u>

AGENDA ITEM SUMMARY

Title	Review and Approve the Welfare Transition (WT) - Transitional Supportive Services Policy
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Code of Federal Regulation: 45 C.F.R. 260.30; 45 C.F.R. 260.31; Florida Statutes, sections 445.002(3)(5); 445.021; 445.025; 445.026; 445.028; 445.030; 445.031; 445.0281 and 445.032(2); Florida Administrative Code: Rules 65A-4.212 and 65A-4.218; Florida Temporary Assistance to Needy Families (TANF) State Plan; CareerSource Florida Administrative Policy Number 020-Transitional Benefits and Services.
Action Requested	Review and Approve revisions to the Welfare Transition (WT) - Transitional Supportive Services Policy
Background	<p>Transitional services are services provided to give support to individuals as they actively seek, accept and maintain employment. These services are not entitlement but provide available support for up to two years to help individuals and families gain the skills and resources they need to make a successful transition from public assistance to self-sufficiency.</p> <p>During the 2024 legislative session, House Bill 1267 (HB 1267) was passed and included additional requirements related to transitional services, including:</p> <ol style="list-style-type: none"> 1. When contacting a recipient of cash assistance who is determined ineligible for a reason other than a work activity sanction, a workforce system case manager must administer the exit survey, which must be attempted before closure of the case management file. 2. Detailed transitional case management requirements, including, but not limited to, the use of a tool to demonstrate future financial impacts of the participant's change in income and benefits over time. The State of Florida will be using the Career Ladder Identifier and Financial Forecaster (CLIFF) Dashboard tool and the One-Stop Service Tracking (OSST) budget planner wizard. <p>Staff revised CSRC's local Transitional Supportive Services Policy to align with House Bill 1267, as well as to mirror Administrative Policy Number 020 Transitional Benefits and Services.</p>
Staff Recommendations	Review and Approve Revisions to the Welfare Transition Program Transitional Supportive Services Policy
Supporting Material	Welfare Transition (WT) - Transitional Supportive Services Policy
Board Staff	<p>Tracey McMorris Vice President of Operations/COO tmcmorris@careersourcerc.com (866) 482-4473 ext. 528</p>

PURPOSE

The purpose of this policy is to establish a uniform standard for the delivery of transitional supportive services to former Welfare Transition Program participants.

REFERENCES

Code of Federal Regulation: 45 C.F.R. 260.30; 45 C.F.R. 260.31; Florida Statutes, sections 445.002(3)(5); 445.021; 445.025; 445.026; 445.028; 445.030; 445.031; 445.0281 and 445.032(2); Florida Administrative Code: Rules 65A-4.212 and 65A-4.218; Florida Temporary Assistance to Needy Families (TANF) State Plan; CareerSource Florida Administrative Policy Number 020-Transitional Benefits and Services.

BACKGROUND

Transitional services are services provided to give support to individuals as they actively seek, accept and maintain employment. These services are not an entitlement but provide available support for up to two years to help individuals and families gain the skills and resources they need to make a successful transition from public assistance to self-sufficiency. The Welfare Transition (WT) transitional services covered in this policy are Transitional Education and Training, Transitional Transportation, and Transitional Child Care (TCC). Families and individuals who leave temporary cash assistance (TCA) due to an increase in income (including an increase in child support), recipients of up-front diversion, relocation assistance, or a cash assistance severance benefit payment, and other individuals may be eligible for transitional services based upon their individual situation.

During the 2024 legislative session, House Bill 1267 (HB 1267) was passed and included additional requirements related to transitional services, including:

1. When contacting a recipient of cash assistance who is determined ineligible for a reason other than a work activity sanction, a workforce system case manager must administer the exit survey which must be attempted before closure of the case management file.
2. Detailed transitional case management requirements, including, but not limited to, the use of a tool to demonstrate future financial impacts of the participant's change in income and benefits over time. The State of Florida will be using the [Career Ladder Identifier and Financial Forecaster \(CLIFF\) Dashboard tool](#) and the One-Stop Service Tracking (OSST) budget planner wizard.

LOCAL POLICY

Each recipient of cash assistance who is determined ineligible for cash assistance for a reason other than a work activity sanction must be contacted by the Career Planner and provided information about the availability of transitional benefits and services. Such contact must include the administration of the exit survey and be attempted before closure of the case in OSST. Career Planners must screen each family, recipient or other individual on a case-by-case basis to identify and eliminate barriers to obtaining or retaining employment and remedy the need to receive ongoing TCA. Transitional supportive services are based on the availability of funding and are limited to up to two years from the last month of receipt of TCA.

Career Planners must enter data and case notes into OSST timely and accurately.

Each recipient of temporary cash assistance who is determined ineligible for cash assistance due to noncompliance with the work activity requirements must be contacted and provided information in accordance with CSRC's [WTP - Pre-Penalty and Sanctions Policy](#) and [WTP - Pre-Penalty and Sanctions Procedure](#). Such contact must include administration of the exit survey.

- I. Transitional Services General Eligibility and Other Requirements
- A. Career Planners must determine the eligibility and the specific need of individuals applying to receive transitional services.
 - B. Each household applying for benefits must have a minor child living in the home under the age of 18 or 19 and not married or divorced if the child is a full-time student in a secondary school or equivalent. This includes children who would not be included except that the child receives Supplemental Social Security Income (SSI).
 - C. Recipients and other individuals must be a former recipient of TCA, and must be employed, actively seeking employment, in need of assistance to retain employment, or in an education or training program.
 - D. To be eligible for transitional services, the former TCA recipient's case must not have closed due to a sanction.
 - E. The following individuals may be eligible to receive transitional services:
 - 1. Former WT recipients who are ineligible to receive TCA due to increased income. The recipient must have secured employment prior to case closure by the Department of Children and Families (DCF) and the case must have been closed with increased income due to one or more of the following reasons:
 - a. The earned income was budgeted by DCF and the amount of earned income terminated TCA.
 - b. The recipient requested and received a Cash Assistance Severance Benefit.
 - c. The recipient opted not to receive TCA.
 - d. The recipient's TCA time limit expired.
 - e. The recipient began to receive or there was an increase in child support.
 - 2. Former TCA recipients and other individuals who receive relocation assistance including victims of domestic violence.
 - 3. Former TCA recipients and other individuals who receive up-front diversion if their income does not exceed 200 percent of the Federal Poverty Level.
 - 4. Former TCA recipients and other individuals who receive a Cash Assistance Severance Benefit.
- II. Transitional Case Management
- A. Each recipient of cash assistance who is determined ineligible for cash assistance for a reason other than noncompliance with work activity requirements is eligible for voluntary case management services administered by CSRC.
 - B. Case management services must be available to support families who transition to economic self-sufficiency and to mitigate dependency on cash assistance.
 - C. Case management services available include, but are not limited to:
 - 1. Career planning
 - 2. Job search assistance
 - 3. Resume building
 - 4. Basic financial planning, which includes OSST budget planner wizard
 - 5. Benefits management using the [CLIFF Dashboard Tool](#) to demonstrate future financial impacts of the participant's change in income and benefits over time. Participant information must be retained in the case file.
 - 6. Connection to support services.
 - D. Career Planners must connect recipients to other transitional benefits as needed.
 - E. Career Planners must also document the case management activities in OSST and detailed case notes outlining the services provided.
 - F. When an exit survey JotForm is completed, staff must enter an activity code 29 in OSST skill development screen with a start date, complete date and an outcome of "Complete."

- G. When completing a CLIFF dashboard session, staff must enter an activity code 30 in OSST skill development screen with a start date, complete date and an outcome of "Complete."
- H. All other transitional services (transportation, childcare, training) must also be entered and updated in OSST.

III. Types of Transitional Services

Transitional services are based on need and include education and training, transportation and childcare. Following is a description of each service.

A. Cash Assistance Severance Benefit

1. To preserve TCA eligibility months, participants who are working and earning income may choose to receive a one-time, lump-sum payment of \$1,000 in lieu of ongoing TCA.
2. The participant must have received TCA for six consecutive months since October 1, 1996, to be eligible.
3. Program staff informs participants about the benefit and determines if they meet eligibility requirements.
4. Participants must sign an agreement that receipt of the payment precludes applying for assistance for six months unless they can demonstrate an emergency.
5. Families that accept the benefit retain their eligibility for food assistance or Medicaid if the family continues to meet eligibility criteria for those programs.
6. There is no penalty for families that opt not to receive the one-time payment. Please refer to CSRC's [WTP - Cash Assistance Severance Policy](#) and [WTP - Cash Assistance Severance Procedure](#) for guidance on the cash assistance severance benefit.

B. Medical Benefits

This benefit is handled solely by DCF.

1. Families losing eligibility for TCA due to earned income have continued eligibility for Medicaid for the immediately succeeding 12-month period if private medical insurance is unavailable from the employer or is unaffordable.
2. A family will be denied Medicaid during the 12-month period for any month in which the family does not include a dependent child, or, if during the second 6 months of the 12-month period, the family's average gross monthly income during the preceding month exceeds 185 percent of the federal poverty level.
3. The family shall be informed of transitional Medicaid when the family is notified by the Department of Children and Families (DCF) of the termination of temporary cash assistance.
4. The notice from DCF must include a description of the circumstances in which the transitional Medicaid may be terminated.

C. Education and Training

1. To assist former recipients of TCA who are working or actively seeking employment in continuing their training and upgrading their skills, education, or training, support services may be provided for up to two years after the family is no longer receiving TCA.
2. Once the Career Planner has determined a participant is eligible to receive transitional education and training, they must:
 - a. Research, identify and use education or training resources available in the community at no additional cost, when possible.
 - b. CSRC may authorize childcare or other support services in addition to services provided in conjunction with employment. For example, a participant who is employed full time may receive childcare services related to that employment and may also receive additional childcare services in conjunction with training to upgrade the participant's skills.
 - c. Ensure transitional education or training is job-related, whether it improves job skills in a recipient's existing area of employment or whether it prepares the recipient for employment in

another occupation.

- d. Determine whether to enter into an agreement with an employer to share the costs related to upgrading the skills of a recipient hired by the employer. This may include CSRC agreeing to provide support services such as transportation or a wage subsidy in conjunction with training opportunities provided by the employer.

D. Transportation

1. Transitional transportation may be provided to assist former WT recipients with maintaining and sustaining employment or educational opportunities.
2. To assist customers with transportation services, CSRC may establish cooperative agreements with:
 - a. Public transit providers;
 - b. Community transportation coordinators designated under chapter 427, F.S.;
 - c. School districts;
 - d. Churches and community centers;
 - e. Donated motor vehicle programs, van pools and ridesharing programs;
 - f. Small enterprise development and entrepreneurial programs that encourage recipients to become transportation providers;
 - g. Public and private transportation partnerships;
 - h. Other innovative strategies to expand transportation options available to program recipients and individuals.
3. Transitional transportation assistance provided by CSRC may include:
 - a. Bus tokens or passes
 - b. Transit vouchers
 - c. Vehicle repairs
 - d. Gasoline
 - e. Vehicle registration
 - f. Vehicle insurance
 - g. Accident insurance
4. CSRC may provide vehicle operation and repair expenses necessary to make a vehicle functional, registration fees, driver license fees, and liability insurance for up to six months.
 - a. Repairs to the vehicle cannot be completed prior to CSRC approving/issuing payment to the vendor.
 - b. Such expenses may be paid to purchase a vehicle valued at no more than \$8,500 if the vehicle is needed for training, employment, or educational purposes.
5. CSRC must:
 - a. Ensure transitional transportation expenses are paid directly to the vendor or by voucher.
 - b. Ensure that the vehicle operational and repair expenses being requested are necessary to make the vehicle functional.
 - c. Ensure that requests for vehicle repairs are accompanied by an estimate of the cost prepared by a repair facility registered under s. 559.904, F.S.
6. CSRC does not reimburse recipients for transportation expenses paid out of pocket.

E. Childcare

1. Transitional childcare (TCC) is available to the following.
 - a. Former WT recipients who have opted not to receive ongoing TCA.
 - b. Individuals redirected through up-front diversion.
 - 1) Prior to an applicant for up-front diversion receiving TCC, the Career Planner must determine whether the recipient obtained employment within 90 days from the date the up-front diversion process started.
 - 2) If employment is not obtained within the 90-day timeframe, the applicant is not eligible for

TCC.

- 3) The Career Planner must give the eligible TCC applicant a 30-day referral for applicant childcare.
- 4) The childcare referral expires at the close of the 30-day timeframe.
- 5) If the applicant has not obtained employment within the 30 days of the childcare referral, the applicant is responsible for his or her own childcare needs for the remainder of the 90-day time period.
- 6) CSRC must require any family receiving up-front diversion to sign an agreement restricting the family from applying for TCA for three months unless an emergency is demonstrated to the Career Planner.

c. Individuals receiving relocation services.

d. Individuals receiving a cash assistance severance benefit.

2. The Career Planner must track the employment of the former WT recipient or individual to determine whether he or she remains employed or loses employment but becomes reemployed within a two-year time frame.
3. The Career Planner must ensure that a child under the age of 19 lives in the home for each household applying for benefits.
 - a. This includes a child who receives Supplemental Social Security Income (SSI) and would have been included in the TCA group if he or she did not receive SSI.
4. A two-parent household (The Florida Department of Children and Families TCA category ADCU) may be eligible for two years of transitional childcare if one parent is working at least 20 hours per week and the other parent is either attending school full time (12 credit hours) or working for at least 20 hours per week.
5. Participants receiving transitional childcare must attend one appointment every three months with a Career Planner.
6. To confirm ongoing employment, participants must submit supporting documentation within two business days of their pay date.
 - a. If the supporting documentation is submitted late more than once without good cause, the transitional childcare service will be terminated and will not be reinstated.

F. Limitation of Job Search Transitional Child Care

1. A recipient may lose a job for a reason that is considered a good cause.
2. When this occurs, he or she may receive transitional services for 30 calendar days to complete job search activities.
3. The 30-calendar day period begins on the date of the referral.
4. If the recipient does not secure employment prior to the 30-day period, he or she can continue to job search; however, transitional services will not be available.
5. If the recipient secures employment prior to the end of the two-year transitional services period, transitional services may be provided for the time remaining.
6. The Career Planner must ensure that transitional job search childcare is limited to 30 calendar days and to individuals who lose employment due to good cause.
7. Good cause criteria includes, but is not limited to the following.
 - a. The job is no longer available due to job layoffs, business closure, etc.
 - b. Job requirements are illegal or against the moral or religious beliefs of the individual.
 - c. Working conditions or job duties could be harmful to the physical or mental health of the individual.
 - d. Sexual or racial discrimination or harassment on the job.
 - e. Change in the job requirements for which the individual is not qualified.
 - f. Change in the hours or location of employment that is not feasible due to childcare or transportation arrangements.

- g. Family or health problems of the individual or children requiring an extensive period off which the parent is unable to arrange with the employer.

G. Retention Incentive Training Accounts (RITA)

1. These accounts are used to promote job retention and to enable upward mobility to higher skilled, higher paying jobs for participants who have gained employment.
 - a. The training may be related to current employment or preparing for employment in another career.
2. RITAs must complement the Individual Training Accounts required by the federal Workforce Innovation and Opportunity Act (WIOA).
3. Participants may use RITAs to pay for tuition, fees, educational materials, coaching and mentoring, performance incentives, transportation to and from class, childcare costs during education courses, and other such costs as CSRC determines are necessary to effect successful job retention and advancement.

H. Other Support Services

CSRC may provide other transitional support or ancillary services to assist with expenses as outlined below.

1. Childcare co-payment and/or registration fees
2. Uniforms
3. Work clothes
4. Shoes
5. Employer's hiring costs
6. Tools
7. Books
8. Exams and licensure fees
9. Physicals, immunizations, and drug screenings
10. Background checks
11. Eyeglasses

IV. Additional Avenues to Receiving Transitional Services

- A. Families and individuals may receive transitional services, which must include an exit survey using Jotform, the OSST budget planner wizard and the CLIFF Dashboard tool, while participating in the following services:

1. Up-front Diversion Service
 - a. Up-front Diversion is a one-time, short-term assistance for TCA applicants who do not need ongoing assistance but have an unexpected circumstance or emergency that requires immediate assistance to secure or retain employment or child support (i.e., domestic violence).
 - b. Applicants for diversion assistance must meet eligibility requirements, but a modified eligibility process reduces wait time to receive assistance.
 - c. Career Planners must screen each family on a case-by-case basis to identify any barriers to obtaining or retaining employment.
 - d. Appropriate diversion services, payment and/or referral(s) must be identified to alleviate the barriers, so the family does not require ongoing TCA.
 - e. Up-Front Diversion is a four-step process:
 - 1) Linking the applicant to a job opportunity as the first option;
 - 2) Offering services such as child care and transportation;
 - 3) Screening applicants to respond to emergency needs;
 - 4) Offering a one-time payment of up to \$1,000 per family.
 - f. A family or recipient engaged in up-front diversion must demonstrate a need and secure a means to meet on-going expenses when it receives the diversion payment.

- g. Upfront diversion services may be provided in the form of cash, vouchers and other in-kind benefits and must be given for what is needed.
- h. Please refer to CSRC's [WTP - Upfront Diversion Policy](#) and [WTP - Upfront Diversion Procedures](#) for guidance on up-front diversion.
- 2. Relocation Assistance Program
 - a. The Relocation Assistance Program provides relocation funds and services to families receiving TCA or who meet eligibility requirements for the diversion program and who have significant barriers to finding and retaining employment.
 - b. A family may use the funds to relocate to communities where there is greater opportunity for attaining self-sufficiency.
 - c. Career Planners determine eligibility, establish a written relocation plan, verify the community receiving the family has the capacity to provide needed services and employment opportunities, and monitor the family's relocation.
 - d. Please refer to CSRC's [WTP - Relocation Assistance Policy](#) and [WTP - Relocation Assistance Procedure](#) for guidance on relocation assistance.
- 3. Cash Assistance Severance Benefit
 - a. The cash assistance severance benefit is a one-time lump-sum payment of \$1,000 available to eligible, on-going TCA recipients who are working and receiving a salary, but where the salary is not enough for them to completely leave TCA.
 - b. Any month in which TCA recipients receive any amount of TCA is a month that is counted toward their lifetime eligibility limit.
 - c. The benefit of receiving cash assistance severance benefit is that it allows recipients to take a break from cash assistance and conserve months of eligibility, which is 48 months in a lifetime.
 - d. Career Planners must inform working recipients about the cash assistance severance benefit and determine if they meet eligibility requirements.
 - e. Career Planners must inform recipients that receipt of the cash assistance severance benefit prohibits them from applying for assistance for six months, unless the recipient can demonstrate an emergency to CSRC.
 - f. Career Planners must verify employment and salary and case note this information in the OSST.
 - g. Please refer to CSRC's [WTP - Cash Assistance Severance Policy](#) and [WTP - Cash Assistance Severance Procedure](#) for guidance on cash severance benefits.

- V. Tracking Transitional Services Eligibility and Receipt
 - A. Career Planners must monitor individuals receiving transitional services for continued need.
 - B. Individuals must be required to provide proof of continued eligibility, including continued employment, actively searching for employment and enrollment in education or training, with the ongoing need to receive services.
 - C. The Career Planners must track continued employment in OSST at job follow-up intervals of 30, 60, 90 and 180 days provided in OSST.
 - 1. If transitional services are declined, the LWDB is not required to track continued employment.
 - D. A determination of termination of a TCC referral must be completed in Section A of the [Notice of Change in Child Care Status form \(FloridaCommerce WTP 5235\)](#), for any individual who fails to provide documentation and verification of continued employment.
 - 1. The form must be provided by CSRC to the local Early Learning Coalition and the participant.

- VI. Sanctions for Noncompliance
 - A. Sanctioned participants are not eligible for transitional services during the sanction period.
 - B. If the participant complies for a sanction lift, does not return to cash assistance, and subsequently obtains or provides documentation of employment, the individual should be provided with referrals to

agencies for community assistance.

- C. A sanctioned participant who has secured a protective payee to receive cash assistance for the family's children and who subsequently obtains employment is not eligible for transitional services. Career Planners must ensure:
1. A sanctioned participant who reports he or she has secured employment is advised to comply with the sanction.
 2. A sanctioned participant under a level two or three sanction is advised to serve the penalty period prior to complying to lift the sanction or receiving support services.

AGENDA ITEM SUMMARY

Title	Review and Approve the Welfare Transition Program (WT) - Up-Front Diversion Policy
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Section 445.017, F.S.; Section 445.035(2), F.S.; Rule 65A-4.212, F.A.C. (Florida Administrative Code); CareerSource Florida Administrative Policy Number 013.
Action Requested	Review and Approve revisions to the Welfare Transition (WT) Program - Up-Front Diversion Policy
Background	<p>Individuals apply for TCA for many reasons including assistance with recurring needs such as shelter, utility payments, food, and monthly expenses. However, many applicants do not need ongoing TCA, but, due to an unexpected circumstance or emergency, require some immediate assistance to secure or retain employment or child support. These immediate obligations may include a shelter or utility payment, a car repair to continue employment, or other services that will alleviate the applicant's emergency financial need and allow the person to focus on obtaining or continuing employment. These needs may be met through up-front diversion, which is available only to applicants as an alternative to ongoing TCA.</p> <p>House Bill 1267, effective July 1, 2024, requires Local Workforce Development Boards (LWDBs) to administer the intake survey as part of the screening process for up-front diversion.</p> <p>Staff revised CSRC's local Up-Front Diversion Policy to align to House Bill 1267 requirements, as well as to mirror Administrative Policy Number 013 Up-Front Diversion.</p>
Staff Recommendations	Review and Approve the Revisions to the Welfare Transition (WT) Program - Up-Front Diversion Policy
Supporting Material	Welfare Transition (WT) Program - Up-Front Diversion Policy
Board Staff	<p>Tracey McMorris Vice President of Operations/COO tmcmorris@careersourcerc.com (866) 482-4473 ext. 528</p>

PURPOSE

The purpose of this policy is to outline CareerSource Research Coast's requirements for providing up-front diversion to applicants of Temporary Cash Assistance (TCA).

REFERENCES

Section 445.017, F.S.; Section 445.035(2), F.S.; Rule 65A-4.212, F.A.C. (Florida Administrative Code); CareerSource Florida Administrative Policy Number 013.

BACKGROUND

Individuals apply for TCA for many reasons including assistance with recurring needs such as shelter, utility payments, food, and monthly expenses. However, many applicants do not need ongoing TCA, but, due to an unexpected circumstance or emergency, require some immediate assistance to secure or retain employment or child support. These immediate obligations may include a shelter or utility payment, a car repair to continue employment, or other services that will alleviate the applicant's emergency financial need and allow the person to focus on obtaining or continuing employment. These needs may be met through up-front diversion, which is available only to applicants as an alternative to ongoing TCA, in accordance with section 445.017, Florida Statutes (F.S.) and 65A-4.212, Florida Administrative Code (F.A.C.).

House Bill 1267, effective July 1, 2024, amended section 445.017, F.S. to require Local Workforce Development Boards (LWDBs) to administer the intake survey required under section 445.035(2), F.S., as part of the screening process for up-front diversion.

LOCAL POLICY

An applicant for TCA who is deemed eligible for up-front diversion may receive a once in a lifetime payment of up to \$1,000. CareerSource Research Coast (CSRC) is responsible for determining up-front diversion eligibility and approval on a case-by-case basis for the receipt of up-front diversion services, payment, or both in accordance with section 445.017, F.S.

Up-Front Diversion must involve the following four steps:

- a. Linking applicants with job opportunities as the first option.
 1. If the applicant has secured employment, provided documentation, and has been determined eligible for diversion services, the appropriate services should be provided to ensure the applicant begins work and retains employment.
 2. If the applicant has not secured employment, the applicant should begin the process of referral to employment opportunities and diligent job search by CSRC staff.
- b. Offering supportive services, such as childcare or transportation, as an alternative to TCA.
- c. Screening applicants to respond to emergency needs.
- d. Offering a one-time payment of up to \$1,000 per family.

An applicant may initiate a request for up-front diversion in various ways to include:

- Submitting a Request for Assistance (RFA) through the Department of Children and Families (DCF). DCF will explain up-front diversion to the applicant. If the applicant is interested and DCF determines the applicant is potentially eligible for TCA and diversion, the applicant will be referred to CSRC to complete the up-front diversion process and initiate the Welfare Transition (WT) work registration process.

- During the application and WT work registration process, the Career Planner may discover the applicant does not require ongoing TCA and find the applicant to be a potential candidate for up-front diversion. Because the applicant may not require on-going recurring TCA, the applicant can be evaluated as a potential candidate for the up-front diversion at this time.
- An individual who has not applied for TCA may go to CSRC and express interest regarding emergency assistance or an up-front diversion payment. CSRC staff must refer the individual to DCF to submit an RFA for TCA.

A. Screening

Individuals applying for TCA and who indicate an interest for up-front diversion must be TCA-eligible in order to be referred by DCF to CSRC for screening to determine Up-Front Diversion eligibility. The TCA prescreening completed by DCF is an initial determination that applicants are potentially eligible for TCA. Applicants are referred to the appropriate LWDB to begin the WT work registration process and to be screened for up-front diversion eligibility.

Using the [Up-front Diversion Screening form \(FloridaCommerce WTP-2073\)](#), Career Planners will complete up-front diversion screening to determine if, due to an unexpected circumstance or emergency, applicants have short-term barriers to obtaining and maintaining employment or child support that could be met through up-front diversion, or if ongoing TCA is needed. The screening must identify barriers that, if corrected, may prevent the family from requiring TCA on a regular basis. Assistance to overcome a barrier to employment is not limited to cash but may include vouchers or other in-kind benefits. At the time of up-front diversion screening, the Career Planner must also review the intake survey required under section 445.035(2), F.S.

Career Planners must retain all documentation used to determine and verify eligibility in the individual's electronic case file. Career Planners must ensure that the One-Stop Service Tracking (OSST) system is updated to reflect activity entries and case notes to document the information received and outcome of the up-front diversion screening process, to include the approval or denial of the request.

a. Eligibility Criteria and Requirements for Up-Front Diversion

TCA applicants must meet the following eligibility criteria for up-front diversion:

1. The applicant must have a child(ren) under age 18 (or under age 19 if the child is still a full-time student in secondary school or at the equivalent level of career training, and does not include anyone who is married or divorced) residing in the home, or a pregnant woman in the family, and meets TCA eligibility criteria in accordance with sections 414.0252(8) and 414.095(5), (14)(a), F.S.
2. An explanation by the family of the unexpected circumstance or emergency situation and what may be needed to resolve it. Some examples of unexpected circumstances or emergency situations that may be considered short-term barriers to obtaining and maintaining employment or child support are:
 - a. automobile repairs;
 - b. catching up on shelter payments to prevent eviction;
 - c. catching up on utility bills, except for cable television and long-distance telephone charges, to prevent interruption of service;
 - d. medical services;
 - e. replacement of income lost due to medical leave without pay;
 - f. emergency childcare while seeking permanent childcare; and,

- g. clothing, shoes, tools, or equipment necessary for employment.
- 3. A determination by the Career Planner and the applicant as to whether the up-front diversion intervention will assist the family to overcome barriers to employment or child support and eliminate the need for ongoing TCA. This includes determining what the family would need to resolve the emergency situation, the family's plan for resolving the emergency situation, and, if necessary, a budget for meeting future expenses or reducing the likelihood of other emergency situations. The Career Planner will utilize the OSST system's budget planner wizard to assist the family with creating a budget. The budget will be retained in the case file and a copy provided to the family.
- 4. Verification that the individual is currently an applicant and is not currently receiving TCA.
- 5. Verification that the applicant has not exhausted their TCA time limit. Once this limit is reached, individuals are no longer eligible for TCA, to include up-front diversion.
- 6. Verification that the applicant has secured an on-going means for meeting monthly recurring expenses.

b. Identity Verification

Career Planners will document and verify applicant's identity through readily acceptable documentation that includes work or school ID cards, driver's license, voter's registration cards, and birth certificates.

c. Social Security Number (SSN)

A SSN is required for the TCA applicant interested in up-front diversion, or the applicant must apply for a SSN with the Social Security Administration. A SSN must be provided for each family member applicable to eligibility determination. If the applicant has received TCA, food assistance benefits or Medicaid in the past, the household members' SSN numbers should already be documented in the system.

d. Citizenship or Qualified Noncitizenship Status

Document the citizenship or qualified noncitizenship status of the individual requesting up-front diversion. If the individual is a qualified non-citizen, verification is required as indicated on the [TANF Eligibility Form \(FloridaCommerce WTP 0005\(a\)\)](#).

e. Information Pertinent to Determining Eligibility

Career Planners will document and accept applicants' statements, unless questionable, as to household composition, income, resources, or other information pertinent to determining eligibility. A self-attestation is acceptable. Printouts from DCF's FLORIDA system that document household composition are also acceptable.

B. Restriction on Application for TCA

Career Planners must notify applicants that receipt of up-front diversion will restrict application for TCA for three months unless an emergency is demonstrated to the Career Planner. Career Planners must use the [Agreement for Up-Front Diversion Payment/Service \(FloridaCommerce WTP 2073\)](#) to notify applicants of this restriction. Both the applicant and Career Planner must sign the [Agreement for Up-Front Diversion Payment/Service \(FloridaCommerce WTP 2073\)](#) signifying notification to the applicant of:

- a. Transitional services;
- b. Restriction on applying for TCA for three months; and

- c. Repayment requirement of up-front diversion payment (see [Section VI. D. Violation of Agreement and Repayment](#) of this policy).

If a recipient of up-front diversion requests assistance from DCF prior to the three-month restriction period ending, he/she must demonstrate an emergency need to CSRC to be approved for TCA (see [Section VI. Violation of Agreement and Repayment](#) of this policy). Note: The three-month restriction includes the month in which the diversion payment was received.

C. Approval or Denial for Payment of Up-Front Diversion

CSRC is responsible for the approval or denial of a family for receipt of up-front diversion services and determining the level of financial need for a one-time payment of up to, but not to exceed, \$1,000. Recipients of up-front diversion may be eligible for up-front diversion services such as childcare or transportation; however, such services must be short term, non-recurrent services (cannot exceed four months) in accordance with 45 CFR Section 260.31(b) as described in [Section E. Up-Front Diversion as a Provision of Services](#) of this policy. Families who are diverted from the receipt of ongoing TCA through up-front diversion may also be eligible to receive transitional support services such as childcare and transportation as described in [Section F. Transitional Services](#) of this policy.

The [Agreement for Up-Front Diversion Payment/Service \(FloridaCommerce WTP 2073\)](#) must be signed by the applicant indicating that he/she:

- Understands the amount the family is potentially eligible for;
- Understands that the family is declining to receive TCA for three months once the up-front diversion payment is received;
- Understands the family may apply for Medicaid or food stamps anytime in the future;
- Understands the up-front diversion payment up to \$1,000 is a once-in-a-lifetime benefit;
- Understands the family may be eligible to receive transitional childcare (TCC) if (s)he is employed within 90 days of the start of the diversion process and the family's income does not exceed 200 percent of the Federal Poverty Level; and
- Understands that if the application for diversion is denied or the applicant chooses not to receive the up-front diversion payment, the TCA application will be processed by DCF. Career Planners must instruct such applicants to complete the WT work registration process to ensure their application for TCA continues to process with DCF for ongoing TCA benefits.

If the up-front diversion request is approved, the Career Planner must complete the following with the applicant to include:

- a. Review the assessment results to determine what services may be needed by the applicant;
- b. Review the intake survey;
- c. Complete the [Career Ladder Identifier and Financial Forecaster \(CLIFF\) Dashboard tool](#);
- d. Complete the OSST Budget Planner Wizard; and
- e. Complete the exit survey using [Jotform](#).

If the up-front diversion request is not approved, the Career Planner must complete [step a](#) and [step b](#) as listed above, in addition to completing the budget planner wizard in the OSST system.

For approved requests, the Career Planner must stipulate the amount of the authorized payment, sign the [Agreement for Up-Front Diversion Payment/Service \(FloridaCommerce WTP 2073\)](#), and email the completed form to the Program Coordinator, or designee, requesting that it be emailed to the local DCF office. A copy of the completed form must be retained in the case file. Once CSRC's approval of up-front diversion is received, DCF must expedite the process and approve the payment within five working days.

The Career Planner must also ensure that the applicant is notified that the up-front diversion payments and/or services will not count against the applicant's 48-month lifetime limit for receiving TCA.

D. Violation of Agreement and Repayment

If a family that received an up-front diversion payment applies for TCA within three months of receiving the payment, the family must be referred to CSRC for work registration and verification of a determination that a demonstrated emergency exists. A qualified emergency reason may include:

- Hospitalization or illness resulting in a significant loss of income or employment;
- Loss of housing;
- Natural disaster responsible for destruction of the family's property; or
- Other situations of similar nature affecting employment.

Upon receipt of the determination that the family meets emergency criteria, DCF will complete the TCA eligibility determination and calculate the repayment value of the up-front diversion payment. The up-front diversion repayment amount will be withheld from any TCA benefit for which the family is otherwise eligible. The amount to be withheld will be based on proration of the up-front diversion payment over eight months.

E. Up-Front Diversion as a Provision of Services

An applicant who is being considered for up-front diversion may or may not require a cash payment of up to \$1,000.00 to divert the family from receiving TCA on a recurring basis. The applicant may need a basic support service to secure employment, secure child support, or overcome an emergency. Support services include:

- Applicant support services to assist the applicant with job search activities, obtaining employment, initiating the WT work registration process, and/or retaining employment;
- Up-front diversion service provision as an alternative to TCA.

Applicant support services are short-term benefits to assist the TCA applicant with completing the TCA application process and obtaining or retaining employment. Applicant support services may include transportation assistance and childcare. Applicant support services should not exceed 30 days due to DCF's time standard to approve or deny a TCA application. Applicant childcare may be provided through the WT childcare referral process.

Up-front diversion as a provision of services comprises short term, non-recurrent services (defined as no more than four months). Support services that are approved as a diversion from on-going cash assistance through local TANF dollars are considered "non-assistance" because the services are provided for a short time period and are addressing an emergency need. These services are considered

“diversion services,” not applicant services. The provision of services as up-front diversion must be recorded under the Service Plan portion of the Skill Development screen in OSST.

Applicants seeking up-front diversion may be provided support services for 30 days, provided there is local funding available and the services are provided in alignment with CSRC’s WTP - Up-Front Diversion Procedures.

F. Transitional Services

Individuals who receive up-front diversion may be eligible for transitional childcare or transitional services to accept, maintain, or actively seek employment, or to upgrade skills if their income does not exceed 200 percent of the federal poverty level and they meet the eligibility criteria in accordance with sections 445.029, 445.030, 445.031 and 445.032, F.S.

The applicant should be given a 30-day referral for applicant child care. The start date of the referral should be the date the up-front diversion process began. If the applicant has not obtained employment when the 30-day referral expires, the applicant is responsible for their own child care needs for the remainder of the 90-day time period. If the applicant obtains employment within 90 days of when the up-front diversion process began, a transitional child care (TCC) referral may be provided.

If the applicant secures employment within the 90-day time period and subsequently loses employment, the applicant is still eligible to receive a 30-day job search TCC referral that is available to any other transitional participant who loses employment.

Please refer to WTP – Transitional Supportive Services Policy for additional information regarding transitional services in the WT program.

G. Sanctioned Participants

During the screening process, a determination should be made whether the family applying for up-front diversion is currently sanctioned. Sanctioned families, including families receiving TCA through a protective payee, are not eligible for up-front diversion. Families with a current two or three level sanction in place must serve the minimum sanction period and then comply to have the sanction lifted before requesting up-front diversion. Once the applicant has complied to lift the sanction, the applicant must complete the application process with DCF. If interested in up-front diversion, the applicant must complete the up-front diversion process prior to DCF approving and issuing TCA benefits.

AGENDA ITEM SUMMARY

Title	Review and Approve the Welfare Transition (WT) Program - Work Requirement Penalties and Pre-Penalty Counseling Policy
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Personal Responsibility and Work Opportunity Reconciliation Act of 1996, Public Law 104-193, Section 408; 45 Code of Federal Regulations 261.30; Section 445.024, Florida Statutes; Section 414.065; and Florida Administrative Code 65A-4.205.
Action Requested	Review and Approve revisions to the Welfare Transition (WT) Program - Work Requirement Penalties and Pre-Penalty Counseling Policy
Background	<p>Families receiving Temporary Cash Assistance (TCA) must participate in work activities or comply with their Individual Responsibility Plan (IRP) or Alternative Requirement Plans (ARP), as a condition of receiving TCA, unless they are exempt. Specific work activities must be done for the minimum number of hours assigned by the Local Workforce Development Board (LWDB). Work activities include but are not limited to: unsubsidized employment; subsidized private-sector employment or public-sector employment; work experience; on-the-job training (OJT); and community service programs.</p> <p>The Department of Children and Families (DCF) imposes penalties, also known as sanctions, to Welfare Transition (WT) participants for noncompliance with work activities and failure to comply with the IRP and/or ARP. The request for penalties is made to DCF by the LWDB when an individual in a family receiving TCA fails to engage in required work activities.</p> <p>Staff revised CSRC's local Pre-Penalty and Sanctions Policy to align with House Bill 1267 to administer the exit survey and utilize the Career Ladder Identifier Financial Forecaster tool in specified circumstances as well as to mirror Administrative Policy Number 037 Work Requirement Penalties and Pre-Penalty Counseling.</p>
Staff Recommendations	Approve the Revisions to the Welfare Transition (WT) Program - Work Requirement Penalties and Pre-Penalty Counseling Policy
Supporting Material	Welfare Transition (WT) Program - Work Requirement Penalties and Pre-Penalty Counseling Policy
Board Staff	<p>Tracey McMorris Vice President of Operations/COO tcmorris@careersourcerc.com (866) 482-4473 ext. 528</p>

PURPOSE

The purpose of this policy is to outline the requirements for CareerSource Research Coast's Welfare Transition Program to manage pre-penalty counseling and work penalties processes for Welfare Transition participants.

BACKGROUND

The Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) of 1996, also known as the Welfare Reform Act, became law effective August 22, 1996. The PRWORA changed cash assistance from an open-ended entitlement program to a time-limited cash assistance program, created the federal Temporary Assistance to Needy Families (TANF) Program, which replaced the Aid to Families with Dependent Children and required work requirements of recipients in exchange for Temporary Cash Assistance (TCA). Cash assistance is limited to a lifetime total of 48 months as an adult, unless otherwise provided by law.

Families receiving TCA must participate in work activities or comply with their Individual Responsibility Plan (IRP) or Alternative Requirement Plans (ARP), as a condition of receiving TCA, unless they are exempt. Specific work activities must be done for the minimum number of hours assigned by the Local Workforce Development Board (LWDB). Work activities include but are not limited to: unsubsidized employment; subsidized private-sector employment or public-sector employment; work experience; on-the-job training (OJT); and community service programs.

The Department of Children and Families (DCF) imposes penalties, also known as sanctions, to Welfare Transition (WT) participants for noncompliance with work activities and failure to comply with the IRP and/or ARP. The request for penalties is made to DCF by the LWDB when an individual in a family receiving TCA fails to engage in required work activities.

House Bill 1267, effective July 1, 2024, amended section 414.065, F.S. to provide good cause for noncompliance with work requirements for a specified time period under certain circumstances.

REFERENCES

Personal Responsibility and Work Opportunity Reconciliation Act of 1996, Public Law 104-193, Section 408; 45 Code of Federal Regulations (C.F.R.) 261.30; Section 445.024, Florida Statutes (F.S.); Section 414.065, F.S.; and Florida Administrative Code 65A-4.205.

I. LOCAL POLICY

CSRC must ensure that each mandatory adult participant in a family receiving TCA, who does not meet an exception, participates in work activities for a minimum number of hours each month as a condition of receiving cash benefits. Work activities are broken out into two categories – Core and Core Plus. Core activities can stand alone and do not require another activity to meet the work participation requirements. Core Plus activities must be accompanied by a minimum number of hours of participation in a core activity to meet the work participation requirements. There are a total of twelve core and core plus work activities that a participant may be assigned.

Core Work Activities

- Unsubsidized Employment
- Subsidized Private Employment
- Subsidized Public Employment
- Vocational Education Training
- Providing Childcare Services

- Job Search and Job Readiness Assistance
- Work Experience
- Community Service
- On-the-Job Training (OJT)

Core Plus Work Activities

- Job Skills Training
- Education Directly Related to Employment
- Satisfactory Attendance in GED/Secondary Program

Failure of a participant to comply with work activities, without an exception or good cause, will result in penalties being applied.

A. Noncompliance Exceptions

The following are good cause exceptions to the non-compliance penalties; however, they do not constitute exceptions to the applicable time limits for receipt of TCA. Before CSRC requests a sanction, a participant must be notified orally or in writing that he or she is subject to sanction and that action will be taken to impose the sanction, unless the participant complies with the work activity requirements. The participant must be counseled as to the consequences of noncompliance and, if appropriate, referred for services that could assist the participant to fully comply with program requirements. If the participant has good cause for noncompliance or demonstrates satisfactory compliance, the sanction may not be imposed.

1. Noncompliance Related to Childcare

Temporary cash assistance may not be terminated for refusal to participate in work activities if the individual is a single parent caring for a child who has not attained 6 years of age, and the adult proves to CSRC an inability to obtain needed childcare for one or more of the following reasons, as required in 45 C.F.R. section 261.56(b).

- Appropriate childcare** – An eligible childcare provider as defined in 45 CFR 98.2 and section 1002.88, F.S. Childcare options must have hours of operation that meet the needs of the parent's work schedule and meet any special needs of the individual child.
- Reasonable distance** – Reasonable distance depends on the geographic area and availability of public transportation. Staff must discuss and determine mileage and/or time needed for travel to and from the job site with the participant.
- Unsuitability of informal childcare** – Informal childcare is suitable only to the extent such care is provided within the constraints of applicable federal and state laws, regulations, and requirements.
- Affordable childcare arrangements** - Annually, the Department of Education's (DOE) Division of Early Learning (DEL) Childcare Resource and Referral Network surveys all legally operating childcare providers to obtain program and rate information. DEL combines the payment rate data with the Florida Department of Commerce's (FloridaCommerce) Bureau of Workforce Statistics and Economic Research data on the average salary of childcare personnel and data from childcare providers on the average cost of childcare (materials, curricula, food, maintenance costs, and average cost of regulatory fees). This information is then submitted to the state's Early Learning Programs Estimating Conference. The conference uses the data to set the maximum reimbursement rates for the state.

2. Noncompliance Related to Domestic Violence

An individual who is determined to be unable to comply with the work requirements because such compliance would make it probable that the individual would be unable to escape domestic violence or due to mental or physical impairment related to past incidents of domestic violence, must be excused from work requirements. However, the individual must comply with a jointly developed plan that specifies alternative requirements that prepare the individual for self-sufficiency, while providing for the safety of the individual and the individual's dependents. This plan is commonly referred to as the ARP.

3. Noncompliance Related to Medical Incapacity

An individual who cannot participate in assigned work activities due to a medical incapacity may be excepted from the activity for a specific period, except that the individual must be required to comply with the course of treatment necessary for the individual to resume participation. The participant's medical incapacity must be verified by a physician licensed under chapter 458 or chapter 459, F.S. An individual for whom there is medical verification of limitation to participate in work activities must be assigned to work activities consistent with such limitations. Evaluation of an individual's ability to participate in work activities or development of a plan for work activity assignment must include vocational assessment or work evaluation. The department or CSRC must require an individual to cooperate in medical or vocational assessment necessary to evaluate the individual's ability to participate in a work activity.

4. Noncompliance Related to Outpatient Mental Health or Substance Abuse Treatment

If an individual cannot participate in the required hours of work activity due to a need to become or remain involved in outpatient mental health or substance abuse counseling or treatment, the individual may be exempted from the work activity for up to five hours per week, not to exceed 100 hours per year to participate in counseling or treatment. An individual may not be excused from a work activity unless a mental health or substance abuse professional certifies the treatment protocol and provides verification of attendance at the counseling or treatment sessions each week.

5. Noncompliance Due to Medical Incapacity by Applicants for Supplemental Security Income (SSI) or Social Security Disability Income (SSDI)

An individual subject to work activity requirements may be exempted from work requirements if the individual provides information verifying that he or she has filed an application for SSI disability benefits or SSDI disability benefits and the decision is pending development and evaluation under social security disability law, rules, and regulations at the initial reconsideration, administrative law judge, or Social Security Administration Appeals Council levels.

6. Other good cause exceptions for noncompliance

Individuals who are temporarily unable to participate due to circumstances beyond their control may be excepted from the noncompliance penalties. As set forth in Rule 65A-4.205, F.A.C., other good cause reasons for failure to comply include the temporary inability to participate due to circumstances beyond the participant's control such as the following.

- a. A family emergency due to the inability to find suitable childcare for a sick child under age 12.
- b. Hospitalization, medical emergency, or death of an immediate family member.
- c. Natural disaster.
- d. Lack of transportation.
- e. Court appearance.
- f. Caring for a disabled family member when the participant provided verification of the need for care and alternative care is not available.

The Career Planner must determine exceptions to noncompliance penalties based on the information provided by the participant. The Career Planner must document in the One-Stop Service Tracking (OSST)

system any good cause or exception to noncompliance in the participant's case file. The Career Planner must also secure and maintain a copy of supporting documentation.

If a participant demonstrates limitations to assigned work requirements and IRP requirements, the Career Planner must jointly develop an ARP with the participant. The ARP must include activities that the participant has the capacity to achieve. The Career Planner must apply penalties to individuals who do not comply with the ARP.

B. Pre-Penalty Counseling

Individuals failing to comply with work activities will be mailed the Notice of Failure to Participate (FloridaCommerce WTP 2290) within two working days following the failure. This form notifies the participant of the failure and possible sanction by CSRC. The notification must inform the individual that he or she has ten calendar days from the date the notification was mailed to contact the Career Planner to provide a good cause reason as to why he or she did not comply with the work requirement.

During the ten-day period, the Career Planner is required to make both **oral** and **written** attempts to contact and to counsel the participant. This written correspondence is satisfied by the issuance of the Notice of Failure to Participate (FloridaCommerce WTP 2290). The Career Planner must counsel the participant to:

1. Determine if the participant had good cause for failing to meet the work requirement;
2. Refer to or provide services, if appropriate, to assist with the removal of barriers to participation;
3. Understand the consequences for failure to comply with work or alternative requirement plan activity requirements without good cause in accordance with Section 414.065, Subsection (1);
4. Provide information regarding transitional benefits in accordance with Section 445.028(2), F.S., if the participant subsequently obtained employment; and
5. Understand that compliance with work activity during ten-day period will avoid the imposition of a sanction. The Career Planner must provide the participant with another work activity within the ten-day period, if it is impossible for the participant to comply with the original assigned activity.

If during the oral counseling, the participant does not choose to comply with the program requirements, staff must make an attempt to complete the required exit survey using Jotform. Additionally, to document the completion of the exit survey, staff must update the Skill Development screen in OSST with activity code 29 to include a start date, end date, and outcome. If the participant refuses to provide responses for the exit survey, staff must document the participant's refusal and the staff's attempt to complete the exit survey via case notes.

If the participant indicates noncompliance due to having obtained employment, the Career Planner must inform the participant about transitional and cash assistance severance benefits that may be available to them. TCA recipients who have been determined ineligible for cash assistance for a reason other than noncompliance with work requirements are eligible for voluntary case management services via the LWDB. These services must include career planning, job search assistance, resume building, and basic financial planning that includes utilizing the OSST budget planner wizard and the Career Ladder Identifier Financial Forecaster (CLIFF) Dashboard tool to demonstrate future financial impacts of the participant's change in income and benefits over time. The Career Planner must also follow the Local Operating Procedures (LOPs) for determining when participants have complied with work activity requirements outlined in their plan.

Career Planners must also administer an exit survey using Jotform for participants leaving the program according to LOP guidance.

If the participant does not contact the Career Planner within the pre-penalty 10-day period, the Career Planner must request the sanction. In this instance, staff is not required to complete the exit survey due to the lack of response by the participant.

C. Penalty Imposition

The Career Planner must request a penalty for a noncompliant participant who does not meet an exception or demonstrate good cause for failure to comply with program requirements. The Career Planner must document pre-penalty counseling and any additional steps taken to facilitate participant compliance prior to requesting a penalty. There are three levels of penalties or sanctions that may be applied to families with noncompliant individuals as follows:

1. First Noncompliance

TCA is terminated for the family for a minimum of ten days from the effective date of the sanction or until the participant complies with the work requirements.

2. Second Noncompliance

TCA is terminated for the family for one month or until the participant complies with the work requirements, whichever is later. When the noncompliant participant meets the work requirement, TCA must be reinstated to the date of compliance or the first day of the month following the penalty period, whichever is later. TCA may be continued for children, under age 16, through a protective payee.

3. Third Noncompliance

TCA is terminated for the family for three months or until the date the participant complies with the work requirements, whichever is later. When the participant meets this requirement, the program must reinstate TCA to the date of compliance or the first day of the month following the penalty period, whichever is later. TCA may be continued for the children, under age 16, through a protective payee.

If a participant receiving temporary cash assistance who is otherwise exempted from noncompliance penalties fails to comply with the alternative requirement plan required in accordance with this section, the penalties mentioned in this section apply. In addition to penalties for TCA, the family's food assistance benefits will also have penalties applied for each noncompliance level.

D. Procedures

If an individual is non-compliant with a work requirement or the ARP, the Career Planner must:

1. Mail the Notice of Failure to Participate (FloridaCommerce 2290) to the participant within two working days after the first failure. This form notifies the participant of the failure and possible sanction by CSRC. The notification must inform the individual that he or she has ten calendar days from the date the notification was mailed to contact the Career Planner to provide a good cause reason as to why he or she did not comply with the work requirement.
2. During the ten-day period, the Career Planner is required to make both **oral** and **written** attempts to contact and to counsel the participant. This written correspondence is satisfied by the issuance of the Notice of Failure to Participate (FloridaCommerce WTP 2290). The written and oral attempts made via phone or through another locally determined method should be documented in the case notes in the OSST system. If the participant does not have a phone, or the number is disconnected, that should be documented as an attempt.

3. If the participant does not respond and the oral and/or written attempts are not successful, a sanction must be requested after allowing the 10 calendar days for the participant to respond.
4. If the oral/written contact is successful or the individual responds prior to the 10 calendar days, the LWDB must determine if good cause exists for the failure and clearly document this in OSST.
5. If good cause is determined, the sanction process ends. The pre-penalty will be ended with good cause and the end date in OSST would be the same as the failure date. A sanction should not be requested if good cause is established.
6. If the requirements of s. 445.024(2)(a)1. related to participation in adult general education or high school equivalency examination preparation are suspended pursuant to s. 445.024(2)(a)2., a participant in noncompliance because of such suspension is considered to have good cause for noncompliance for up to six weeks after the change in the participant's work requirements. This timeframe allows the participant to transition from the adult general education or high school equivalency examination preparation courses to another activity without adverse impacts.
7. If the participant has subsequently obtained employment, the participant must be counseled regarding the transitional benefits that may be available and provided with information on how to access such benefits.
8. If good cause is not determined but the individual agrees to demonstrate satisfactory compliance:
 - a. The Career Planner must provide counseling regarding the consequences of noncompliance and determine services the participant will need that would assist him or her in becoming compliant.
 - b. The Career Planner must assign the participant to an activity or other work requirement. End the pre-penalty with "compliance" once the individual begins complying using the date they agreed to comply as the end date. It is important to develop an Alternative Requirement Plan, if appropriate.
 - c. If the individual complies and does not have another failure without good cause within 30 calendar days from the date of the first failure, the sanction process ends, and a sanction is not requested.

If a participant's cash assistance case is closed due to a sanction and the participant reapplies for cash assistance, DCF will refer the participant to CSRC to comply. When the participant complies, the Career Planner must send a request to DCF and DCF will lift the sanction and approve the benefits.

Any month a family receives a TCA payment, including payments to a protective payee, is considered a time-limited month. Any month for which a family does not receive a payment is not counted as a time-limited month for calculating time limits, even if the total absence of payment is due to a penalty for noncompliance. DCF is responsible for managing and calculating time limits.

The Career Planner must inform participants during noncompliance counseling that continuation of TCA through a protective payee counts toward the family's cumulative time limit.

E. Protective Payee

Persons who are sanctioned under a level two or three penalty may request a protective payee to receive TCA on behalf of the children. DCF will designate the protective payee. If a sanctioned participant with a protective payee report that he or she has obtained employment, the participant is not eligible for transitional benefits or services. However, the Career Planner must advise the participant to comply with the work requirements and serve the penalty period in order to get the sanction lifted. The

Career Planner may provide referrals to community agencies to assist the participant with securing support for retaining employment.

F. Failure to Demonstrate Satisfactory Compliance

Failure to demonstrate satisfactory compliance occurs when a participant has more than one failure within a 30-calendar day period without good cause. The Career Planner must document a second failure to comply within the 30-calendar day compliance period in OSST. Good cause reported by the participant must also be recorded in OSST and the sanction request must not be made.

If good cause is not reported within three working days after the second failure occurs, the Career Planner must request a sanction. A Notice of Failure to Demonstrate Satisfactory Compliance (FloridaCommerce WTP 2292) must be mailed to the participant within three business days from the date of the failure.

If the participant fails to comply due to having obtained employment, the Career Planner must verify the employment and enter the information in OSST and must administer the exit survey. The Career Planner must record the name and address of the employer and person contacted, as applicable, date employment began, wages, the number of hours worked per week, and the type of work being performed. If the participant is not employed for a minimum of thirty hours per week and remains TCA-eligible, the Career Planner must assign the participant to additional countable work activity hours.

The Career Planner must also advise the participant of all available transitional benefits, to include the use of the OSST budget planner wizard and the CLIFF Dashboard tool. A participant whose assistance is terminated due to a work program sanction is not eligible for transitional benefits.

G. Forgiveness Policy

Section 414.065, F.S. provides that if a participant fully complies with work activity requirements for at least six months, the participant must be reinstated as being in full compliance with program requirements for the purpose of sanctions imposed. If an individual is compliant for six months after a sanction is lifted due to compliance, any subsequent sanction would be treated as a level one. For example, if an individual fully complies for a minimum of six months after complying to have a level three sanction lifted, the next sanction would be considered a level one.

The compliance period, as pertains to the forgiveness policy, does not have to be for six consecutive months. If the mandatory participant's case closes for any reason, other than a work penalty, the time the participant was in compliance with the WT program is counted towards the forgiveness period. The receipt of transitional services or the time during which the participant is in "transitional status" does not count as compliance towards the forgiveness period.

AGENDA ITEM SUMMARY

Title	Review and Approve the Welfare Transition (WT) Program - Hardship Extensions for Temporary Cash Assistance Policy
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Personal Responsibility and Work Opportunity Reconciliation Act of 1996, Public Law 104-193, Section 408; Section 414.105 Florida Statutes; and Florida Administrative Code 65A-4.201.
Action Requested	Review and Approve revisions to the Welfare Transition (WT) Program - Hardship Extensions for Temporary Cash Assistance Policy
Background	<p>The Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) of 1996, also known as the 1996 Welfare Reform Act, became law effective August 22, 1996. The PRWORA changed cash assistance from an open-ended entitlement program to a time limited cash assistance program, created the federal Temporary Assistance to Needy Families (TANF) Program, which replaced the Aid to Families with Dependent Children and required work requirements of recipients in exchange for TCA. The state of Florida imposed a cumulative lifetime limit of 48 months receipt of cash assistance rather than the 60 months allowed by PRWORA.</p> <p>The 48-month lifetime limit does not apply to:</p> <ul style="list-style-type: none"> • Cases in which a child is the only recipient. Therefore, any months that a minor child receives TCA are not counted towards their 48-month lifetime limit. • An individual who receives Supplemental Security Income (SSI) benefits or Social Security Disability Insurance (SSDI) benefits. • An individual who is the caretaker of a disabled family member. The case file must contain documentation that the disabled family member requires a caretaker and that there are no other means by which the disabled family member can be cared for. <p>During the 2024 legislative session, House Bill (HB) 1267 was passed and required additional actions tied to recipients who are approaching the statutory time limitation for TCA. The bill requires that staff:</p> <ul style="list-style-type: none"> • Collect information on the TCA recipient's enrollment in other benefits programs, long-term career plan, credentials, education, or training received during enrollment, barriers to employment addressed, and remaining barriers to employment through

administration of an exit survey at the points of contact required when a TCA recipient becomes, or is anticipated to become, ineligible for TCA.

- Utilize a financial tool such as the Career Ladder Identifier and Financial Forecaster (CLIFF) to demonstrate future financial impacts of the participant's change in income and benefits over time.

Staff revised CSRC's local Pre-Penalty and Sanctions Policy to align with House Bill 1267 to administer the exit survey and utilize the Career Ladder Identifier Financial Forecaster tool in specified circumstances as well as to mirror Administrative Policy Number 037 Work Requirement Penalties and Pre-Penalty Counseling.

**Staff
Recommendations**

Review and Approve the Revisions to the Welfare Transition (WT) Program - Hardship Extensions for Temporary Cash Assistance Policy

Supporting Material

Welfare Transition (WT) Program - Hardship Extensions for Temporary Cash Assistance Policy

Board Staff

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PURPOSE

The purpose of this policy is to outline the requirements for CareerSource Research Coast's Welfare Transition Program to recommend a hardship extension to recipients of Temporary Cash Assistance (TCA).

REFERENCES

Personal Responsibility and Work Opportunity Reconciliation Act of 1996, Public Law 104-193, Section 408; Florida Statutes (FS), Section 414.105; Florida Administrative Code Rule 65A 4.201; and CareerSource Florida Administrative Policy 025.

BACKGROUND

The Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) of 1996, also known as the 1996 Welfare Reform Act, became law effective August 22, 1996. The PRWORA changed cash assistance from an open-ended entitlement program to a time limited cash assistance program, created the federal Temporary Assistance to Needy Families (TANF) Program, which replaced the Aid to Families with Dependent Children and required work requirements of recipients in exchange for TCA. The state of Florida imposed a cumulative lifetime limit of 48 months receipt of cash assistance rather than the 60 months allowed by PRWORA.

The 48-month lifetime limit does not apply to:

- Cases in which a child is the only recipient. Therefore, any months that a minor child receives TCA are not counted towards their 48-month lifetime limit.
- An individual who receives Supplemental Security Income (SSI) benefits or Social Security Disability Insurance (SSDI) benefits.
- An individual who is the caretaker of a disabled family member. The case file must contain documentation that the disabled family member requires a caretaker and that there are no other means by which the disabled family member can be cared for.

During the 2024 legislative session, House Bill (HB) 1267 was passed and required additional actions tied to recipients who are approaching the statutory time limitation for TCA. The bill requires that staff:

- Collect information on the TCA recipient's enrollment in other benefits programs, long-term career plan, credentials, education, or training received during enrollment, barriers to employment addressed, and remaining barriers to employment through administration of an exit survey at the points of contact required when a TCA recipient becomes, or is anticipated to become, ineligible for TCA.
- Utilize a financial tool such as the Career Ladder Identifier and Financial Forecaster (CLIFF) to demonstrate future financial impacts of the participant's change in income and benefits over time.

LOCAL POLICY

The Department of Children and Families (DCF) is responsible for identifying time limits of TCA recipients and notifying CareerSource Research Coast (CSRC) of those who are within six months of their 48-month time limit. The recipients are required to participate in an employability review conducted by CSRC to gauge progress towards self-sufficiency and employment. During the employability review, CSRC must do the following.

- Assess the participant's employment prospects.
- Assess and identify barriers to employment.
- Provide the appropriate services/referrals to assist with eliminating employment barriers.
- Develop a plan to identify actions necessary to obtain employment prior to reaching the end of the time limit.

- Review the hardship extension criteria with the participant and advise him/her whether he/she qualifies for a time limit extension recommendation.
- Provide the participant information regarding a hardship extension, including his/her rights and responsibilities.
- Administer the mandated exit survey to collect information on the participant at the point he/she becomes, or is anticipated to become, ineligible for TCA.
- Assess the participant's potential change in income and benefits over time by utilizing the CLIFF Dashboard.

I. Hardship Extension

- A. A hardship extension allows participants to receive additional months of TCA payments beyond the state established limit of 48 months.
- B. DCF is responsible for the review of the participant's TCA payment history to determine if the participant has reached 42 months of the 48-month lifetime limit.
- C. If the participant has received 42 months of time limited TCA, DCF notifies CSRC.
- D. Upon notification, CSRC schedules an interview with the participant to assess employment prospects and employment barriers, to evaluate the participant's participation in the Welfare Transition program, and to determine if a hardship extension is needed.
- E. If CSRC determines that an extension is warranted, a recommendation must be made to DCF to extend TCA payments beyond the 48-month time limit.
- F. When DCF receives the recommendation and approves the hardship extension request, TCA payments will be extended for the number of months recommended by CSRC.
- G. CSRC must ensure individuals who receive a hardship extension comply with TANF work requirements.
- H. CSRC is responsible for initiating the hardship extension process and conducting an employability review for any current participant who previously refused a hardship extension, but later decides the hardship extension is needed.
- I. Former participants (participant's case closed prior to the receipt of 48-month lifetime limit) who previously refused, but later decide to request a hardship extension, must be directed to complete an ACCESS Florida application for benefits via the DCF website.
- J. In either case, if the LWDB determines that an extension is not warranted, the participant will only receive the allowable 48 months.

II. Eligibility

To receive a hardship extension, an individual must meet one or more of the following eligibility criteria.

- A. Diligent participation in work activities and the inability to obtain employment.
- B. Diligent participation in work activities combined with extraordinary barriers to employment, including conditions that may result in an exemption from work requirements.
- C. Diligent participation in work activities and a need by teen parents for an exemption in order to have 24 months of eligibility beyond receipt of the high school diploma or equivalent.
- D. Significant barriers to employment combined with a need for additional time.
- E. A recommendation of extension for a minor child of a participating family at the end of the eligibility period for TCA based on a review that determines the termination of a child's TCA would likely result in the child being placed into an emergency shelter or foster care.
- F. The participant is a victim of domestic violence, if the effects of such violence delay or otherwise interrupt or adversely affect the participant's participation.

CSRC must ensure individuals who receive a hardship extension comply with TANF work requirements.

CSRC is responsible for initiating the hardship extension process and conducting an employability review for any current participant who previously refused a hardship extension, but later decides the hardship extension is needed. Former participants (participant's case closed prior to the receipt of 48-month lifetime limit) who previously refused, but later decide to request a hardship extension, must be directed to complete an ACCESS Florida application for benefits via the DCF website. In either case, if CSRC determines that an extension is not warranted, the participant will only receive the allowable 48 months.

III. Processing Requests for Hardship Extension of Time Limits

- A. To process requests for a hardship extension of time limited months, staff must do the following.
 1. Document receipt of the [Hardship Extension Review Form \(CF-ES 2082\)](#) in the One-Stop Service Tracking (OSST) system for the participant. A copy of the Hardship Extension Review Form must be retained in the participant's case file.
 2. Schedule an employability review with the participant to assess employment potential and barriers. The employability review appointment is a mandatory appointment. The participant must be notified in writing that a mandatory employability review has been scheduled and provide the date, time and location via an appointment letter.
- B. If the participant attends the employability review and requests a hardship extension, the Career Planner must do the following.
 1. Review the participant's case (participation, engagement, current circumstances, etc.) and indicate if a hardship extension criterion has been met.
 2. Review the participant's employment potential and barriers to employment to assist with identifying actions necessary to become employed prior to reaching the TCA lifetime limit.
 3. Complete and discuss the budget planner wizard in OSST to assist the participant in developing a budget of monthly income and expenses. The budget planner wizard should be printed, signed by the participant, and retained in the case file.
 4. Complete and discuss the results of the CLIFF Dashboard tool. A copy of the results should be provided to the participant and a copy retained in the case file. OSST must be updated with an entry of the activity code 30 on the Skill Development screen including the start date, completion date and closed with an outcome of "Complete".
 5. Develop a plan to identify actions necessary to obtain employment prior to reaching the end of the time limit.
 6. Review the [Hardship Extension Statement of Understanding Form \(WTP 2086\)](#) with the participant. The form must be signed and dated by the participant and staff. A copy should be provided to the participant and a copy retained in the case file.
 7. Determine whether a hardship extension is warranted. Complete and sign Section B of the Hardship Extension Review Form to reflect the staff's recommendation. If a recommendation for additional time is being provided, the form must include the recommended number of additional months. The completed form must be returned to DCF to allow for processing of the LWDB's recommendation.
 8. Require the participant to sign and update Section C of the Hardship Extension Review Form by checking the statement - "I am requesting an extension to my time limits for temporary cash assistance", when the participant is being recommended for a hardship extension. A copy of the completed form must be retained in the case file.
 9. Complete the exit survey via Jotform. Enter an activity code 29 on the Skill Development screen in OSST including the start date, completion date and an outcome of "Complete".
 10. Update the Hardship section of the Alternative Plan within OSST with the actions taken during the employability review process.

- C. If a participant attends the Employability Review, but does not request a hardship extension, the Career Planner must do the following.
1. Discuss the participant's time limits, current situation and options. Staff must assist the participant with identifying barriers to employment and providing (or refer to community partners for) services to overcome barriers to employment and promote their family's self-sufficiency.
 2. Review the [Hardship Extension Statement of Understanding Form \(WTP 2086\)](#) with the participant. The form must be signed and dated by the participant and staff. A copy should be provided to the participant and a copy retained in the case file.
 3. Require the participant to sign and update Section C of the Hardship Extension Review Form by checking the statement - "I am not requesting an extension to my time limits for temporary cash assistance." A copy of the completed form must be retained in the case file.
 4. Return the completed [Hardship Extension Review Form](#) to DCF for processing.
 5. Complete and discuss the budget planner wizard in OSST to assist the participant in developing a budget of monthly income and expenses. The budget planner wizard should be printed, signed by the participant, and retained in the case file.
 6. Complete and discuss the results of the CLIFF Dashboard tool. A copy of the results should be provided to the participant and a copy retained in the case file. OSST must be updated with an entry of the activity code 30 on the Skill Development screen including the start date, completion date and closed with an outcome of "Complete".
 7. Complete the exit survey via Jotform. Enter an activity code 29 on the Skill Development screen in OSST with a start date, completion date and an outcome of "Complete".
 8. Update the Hardship section of the Alternative Plan within OSST with the actions taken during the employability review process.
- D. If the participant does not attend the appointment, staff must do the following.
1. Update Section B on the [Hardship Extension Review Form](#) and document that the participant was a no-show.
 2. Update the Alternative Plan in OSST and document that the participant was a no-show, and no extension is requested.
 3. Return the completed [Hardship Extension Review Form](#) to DCF and retain a copy in the case file.
 4. Initiate the pre-penalty counseling procedures. Document the participant's failure to meet for the mandatory employability review and the outcome of the pre-penalty counseling in the case notes.
 5. Complete the exit survey via Jotform during the pre-penalty counseling, if pre-penalty counseling is successful. Enter an activity code 29 on the Skill Development screen in OSST including the start date, completion date and an outcome of "Complete".
 6. Update OSST with the actions taken as a result of the participant's failure to attend the mandatory employability review.

Once the participant's case is closed due to the expiration of time limited months, staff should refer the participant back to DCF and instruct them to complete an online application for benefits in the DCF's ACCESS system.

IV. Determination of Hardship Extension

If the Career Planner determines that an extension is needed, a recommendation is provided to DCF to extend TCA payments beyond the 48- time limit. DCF is responsible for reviewing the recommendation and making a final determination to deny or approve hardship extension requests.

A. Hardship Extension Approved by DCF

1. Career Planner will schedule an appointment with the participant to discuss the hardship extension approval and continued program participation. Staff should also ensure the participant understands the end date of the hardship extension.
2. Develop or update the Individual Responsibility Plan (IRP) or Alternative Requirement Plan (ARP) to guide the actions needed to assist the participant in gaining employment prior to the expiration of the extension.
3. Engage the participant in work activities to remain compliant in the program. Staff must also provide support services or community referrals to assist the participant in overcoming barriers to program participation.
4. Explain that the participant must comply with his/her IRP and reiterate the work penalties that may be applied if the participant is noncompliant.
5. Update OSST with the actions taken during the appointment.

B. Hardship Extension Denied by DCF

1. Career Planner will update OSST to reflect the denial.
2. Contact and advise the participant of the denial of their hardship extension request.
3. Prepare the individual for the termination of cash assistance and offer him/her referrals for community resources that may assist with their continued path to self-sufficiency.
4. Inform the participant of his/her rights to request a fair hearing and file a grievance with DCF if the participant disagrees with the denial.
5. Complete and discuss the results of the CLIFF Dashboard tool. A copy of the results should be provided to the participant and a copy retained in the case file. OSST must be updated with an entry of the activity code 30 on the Skill Development screen including the start date, completion date and closed with an outcome of "Complete".
6. Complete the exit survey via Jotform. Enter an activity code 29 on the Skill Development screen in OSST with a start date, completion date and an outcome of "Complete".

V. Compliance Requirements

Participants who are on an extension are required to comply with their Individual Responsibility Plan (IRP). This document must include alternative activities. The development of this document must take into consideration the participant's situation and medical ability to comply. Failure of the participant to comply will result in pre-penalty counseling and may also result in a sanction being imposed. Special circumstances related to hardship extensions and program compliance include the following.

- A. Participants who have received an SSI/SSDI time limit extension and are subsequently sanctioned, may comply with the Welfare Transition program to lift their sanction
- B. Non-compliant participants can be sanctioned for failure to comply with work activity requirements, alternative requirements, or plan requirements. If sanctioned, the participant's TCA will close, and the remaining extension months, if any, will be voided.
- C. Participants cannot be prohibited from applying for the remainder of their hardship months, if their case is closed as a result of failure to comply with the work requirements after being approved for a hardship extension. If the participant reapplies for TCA or requests a review, he/she must complete an application for assistance. As part of the application review process, DCF must complete the time limit review process form and forward the referral to CSRC.

VI. Right to Request of Withdraw

Prior to exhausting the 48-month time limit, a participant has the right to request an extension of the time limit. If the participant's TCA case is closed and the participant would like to request an extension, the

Career Planner must notify the participant to file a Request for Assistance (RFA) with DCF. If the participant is a current recipient of TCA and would like to request an extension, the Career Planner must assist with initiating the process. In addition, the participant has a right to withdraw a hardship extension request at any time by notifying their Career Planner. The Career Planner must case note the request and promptly notify DCF of the participant's decision to withdraw the request.

VII. Supplemental Security Income (SSI) Program and the Social Security Disability Insurance (SSDI) Program

CSRC requires participants who apply for SSI/SSDI or file an appeal to submit supporting documentation. A participant who has applied for SSI/SSDI but has not received a determination must be granted an extension of the applicable time limit until a final determination has been made. DCF is responsible for reviewing the individual's time limit. If no application or appeal for SSI/SSDI is verified, DCF should forward the Hardship Extension Review Form (CF-ES 2082) to CSRC. During the application and appeals process, CSRC requires compliance by the participant with the established IRP or ARP. If a final determination results in the denial of SSI/SSDI benefits, any months during which the individual received TCS will count against his/her 48-month lifetime limit.

AGENDA ITEM SUMMARY

Title	Reemployment Services and Eligibility Assessment (RESEA) Program - Design and Framework Policy
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Bipartisan Budget Act (BBA) of 2018, Public Law 115-123; CareerSource Florida Administrative Policy 128
Action Requested	Review and Approve the new RESEA Program - Design and Framework Policy
Background	The Reemployment Services and Eligibility Assessment (RESEA) program began as the voluntary REA pilot launched by USDOL in 2005 to support UI claimants with reemployment needs and reduce improper benefit payments. RESEA replaced REA in 2016 and became mandatory for all Florida LWDBs in 2022. The program helps RA claimants return to work more quickly, reduces the average duration of benefits, and safeguards program integrity by preventing improper payments. It also aligns with WIOA's vision of integrated service delivery and serves as an entry point for claimants into the broader workforce system and partner programs.
Staff Recommendations	Review and Approve the RESEA Program - Design and Framework Policy
Supporting Material	RESEA Policy - Design and Framework Policy
Board Staff	Tracey McMorris Vice President of Operations/COO tmcmorris@careesourcerc.com (866) 482-4473 ext. 528

- Providing accessible alternatives (see section title Service Delivery Methods) to technological and digital tools. This includes identification and provision of logistical support needed to best serve individuals selected for RESEA participation in rural and urban communities.
- Providing reasonable accommodations, modifications, and auxiliary aids and services.
- Ensuring all communications are provided in the language the participant is most familiar with based on their selection in their profile in the state's Management Information System (MIS).

A. Program Operations

The RESEA program framework design includes the initial RESEA appointment and appropriate referrals to other programs and community resources, as needed.

1. Initial RESEA Appointment

The term “initial RESEA” means the actual meeting (appointment) between career center staff and the participant where the required RESEA services are completed. CSRC RESEA program staff must ensure the services below are provided during the initial appointment. Services must be documented in Employ Florida and comply with requirements outlined in the [Employ Florida Service Code Guide for Jobseeker Services](#). The Initial RESEA Appointment is considered “complete” only after the following services have been provided and recorded in Employ Florida:

a. Orientation

The first step in the initial RESEA appointment is to complete an orientation with the participant. The orientation is a session where staff provide an overview of the programs and services available in the career center to RESEA participants. During the orientation, staff must outline requirements for RESEA program participation, and provide information about available career center services, partner programs, and community resources. The orientation session may be facilitated on an individual or a group basis. Further, the manner in which orientation may be provided includes a staff-led or self-paced presentation, pre-recorded webinar, or other comparable format(s).

b. Objective Assessment Summary

The next step is the Objective Assessment Summary (OAS), which is a documented evaluation of the academic and occupational skills, career interests, personal needs, and developmental needs of the participant. It must include a review of prior work experience; aptitudes for both traditional and non-traditional careers; academic history; basic skills; work readiness, and barriers to employment. Staff must document any formal or informal assessment and/or testing used to gauge an individual's current knowledge, skills, and abilities.

The OAS wizard in Employ Florida must be fully completed by CSRC RESEA program staff during the initial RESEA appointment. Should there be instances where the system is not available (i.e. system disruptions/outages), staff may use other assessment tools, given the chosen assessment tool contains the same information as the system-generated OAS. Additionally, staff must update the system as soon as it is available but no later than 15 days from the date the service was provided.

When a participant completes the background wizard and/or résumé builder, some of the participant's information will automatically populate into the OAS. As a result, limited information will need to be inputted to complete the OAS. Staff must review the results of the OAS with the participant.

Participants enrolled in or receiving services from a partner program may already have a previously completed the OAS in Employ Florida. A new OAS is not required if the OAS was completed within the last six months. If the participant has an open OAS, RESEA staff must work with the partner program and update the OAS to incorporate the RESEA components.

c. Employability Development Plan

The third step is the creation of a service plan or Employability Development Plan (EDP). The information obtained from the OAS builds the foundation for creating a step-by-step guide to support the participant in returning to work as quickly as possible. The EDP is designed to help jobseekers navigate the increasingly complex steps to their next job or a better career.

The EDP must include steps the participant must take to identify and achieve education and employment goals, as appropriate. The EDP must be unique and specific to each participant and identified goals must be based on the participant's past work experience or future desired occupation. The EDP must include at least one short-term goal (0-12 months) and the accompanying objectives to complete the goal.

An effective EDP must use the S.M.A.R.T. principle to create specific, measurable, attainable, relevant, and time-bound goals and objectives, as described below:

- Specific goals are easy to comprehend and clearly indicate what the participant intends to do. Specific objectives are the action steps outlining exactly what the participant should do in order to achieve the goal.
- Measurable goals have benchmarks allowing participants to see progress towards successfully achieving the goal. Goals are measurable by establishing objectives to show progress.
- Attainable goals and objectives can be realistically expected to be completed within the timeframe given.
- Relevant goals and objectives must be relevant to what the participant is trying to achieve. A relevant goal is based on the participant's work history, education, training, special skills, interests, and aptitudes.
- Time-bound goals and objectives should be limited to a defined period and include a specific timeline for each step of the process.

Staff must create the EDP using the wizard in Employ Florida. Staff must print the EDP and obtain the appropriate signatures (staff and participant). A copy of the signed EDP must be provided to the participant and the original must be maintained in the participant's Employ Florida file. Should there be instances where the system is not available (i.e. system disruptions/outages), Staff may use locally created EDPs, given the document contains the same information as the system-generated EDP. Additionally, staff must update the system as soon as it is available but no later than 15 days from the date the service was provided.

For EDPs created remotely, staff and the participant must sign the EDP electronically. Once signed, staff must provide a copy of the document to the participant electronically or via mail.

Additionally, the EDP must include Work Search Activities (WSA) that support the participant finding suitable employment and are documented as an objective within the participant's plan. Each participant must be assigned to complete a minimum of one specific work search activity. Although provision of work search activities is required, they are not considered a permissible use of RESEA grant funds; therefore, each RESEA participant must be co-enrolled in the Wagner-Peyser (WP) program during the initial appointment.

Note: A separate work search activity appointment is not required as a part of the RESEA initial appointment.

In addition, as part of the career planning process, staff are required to utilize tools that:

- Assist with demonstrating future financial impacts of the participant's change in income over time;
- Focus on mitigating benefit cliffs for participants seeking employment that leads to self-sufficient employment; and
- Better understand specific gaps and barriers faced by participants

d. **Career Ladder Identifier and Financial Forecaster (CLIFF) Dashboard**

The state approved tool is the Career Ladder Identifier and Financial Forecaster (CLIFF) Dashboard. The education and employment goals identified for participants must be created using information or data obtained through the administration of the CLIFF Dashboard. Usage of the tool should be tracked in Employ Florida using the service code “CLF” as defined in the [Employ Florida Service Code Guide for Jobseeker Services](#).

e. **Labor Market Information**

Labor Market Information (LMI) is the specific and unique information pertaining to the socio-economic forces which can guide participants with their job search. It provides occupational staffing and hiring patterns, wage information and labor market employment data relating to local, regional, and national labor market areas.

Labor market information must be customized to each participant and provided as a part of the initial RESEA appointment. Staff may not utilize universal or template LMI. Because the goal of LMI is to provide a general guide to jobs and the job market, staff may provide LMI as often as needed; however, staff must not duplicate previous information provided to the participant. Documentation and case note requirements must align with the [Employ Florida Service Code Guide for Jobseeker Services](#).

f. **Eligibility Review Process (ERP)**

CSRC RESEA program staff must conduct the Eligibility Review Process (ERP) with each RESEA participant to determine continued eligibility for reemployment assistance benefits. The ERP must be conducted on a one-on-one basis, and it includes the review of the individual’s availability to work, work search activities and referral to the RA adjudication office if one or more issue or potential issue(s) is identified. FloridaCommerce created a standard ERP form that must be used by staff to conduct the ERP. The ERP form will be a part of the standard notification letter each RESEA participant receives.

The notification letter informs individuals of their selection for and mandatory participation in the program. Participants must bring the completed ERP form and submit it to staff at the initial RESEA appointment. Staff must review the ERP form during the initial RESEA appointment with the participant to ensure completeness and accuracy. When issues are identified, the CSRC RESEA program staff must submit the completed ERP form that identifies potential issues to: RESEA.ELGISS@commerce.fl.gov. The identified issues will be referred to the RA Adjudication team for handling. CSRC RESEA program staff must upload the completed ERP form to the participant’s case file in Employ Florida within one business day of the completed initial RESEA appointment.

2. Service Delivery Methods

CSRC RESEA program staff must make RESEA services available for participants via more than one alternative, which may include in-person, remote, virtual, telephonic, or a hybrid format using any two or more methods. For remote or virtual options, staff may use person-to-person technologies such as Skype, Zoom, FaceTime, Teams or other similar applications.

These tools:

- enhance the participants’ experience with RESEA services;
- complement the resources and services provided during the initial RESEA;
- significantly expand the number of RA claimants who can be served under the RESEA program; and
- significantly reduce the participant’s burden and hurdles to participation

The level and timeliness of these service delivery methods must be comparable to the in-person services.

3. Pool Management, Appointment Scheduling and Notification

CSRC RESEA program staff are required to manage the RESEA pool(s) each Monday morning. Staff must select a “number” or “percentage” of participants to be placed in their pool. On the following Tuesday, staff must print and mail RESEA appointment letters to all claimants selected for RESEA program participation. It is understood that these days may shift when there are office closures, system issues/changes or other actions beyond the state or CSRC’s control.

CSRC RESEA program staff must use the standard notification letter provided by FloridaCommerce; however, it can be appended to include specific local processes and/or information with approval from the Director of Programs or higher authority. The letters must include the date, time, manner by which services will be delivered, location of the appointment and contact information for the CSRC RESEA program staff. FloridaCommerce has translated the standard letter from English to Spanish and Haitian Creole. CSRC RESEA program staff may print the letter based on the language selected by the RESEA participant in Employ Florida from the login page.

CSRC must develop a process that will take place after the notification letter is mailed, but prior to the appointment, to engage participants and cause an increase in attendance and completion of the Initial RESEA Appointment. Staff should engage participants in a manner deemed appropriate as defined in CSRC’s local operating procedures, to reiterate the mandatory participation requirements and consequences for non-participation.

4. The Wagner-Peyser Application

The RESEA participant’s WP application must be completed prior to, or during the initial RESEA appointment. Failure to complete the application could adversely impact benefits due to the current system configuration which will not allow staff to result the participant as “Attended” until the WP application is complete.

5. RESEA Documentation Requirements

All services provided by CSRC RESEA program staff during any RESEA appointment must be documented in Employ Florida. The four-pack of services (Orientation, OAS, EDP, and LMI), are automatically generated in the system’s event calendar. Once staff results the participant’s attendance, the four-pack of services will automatically attach to the participant’s service plan. CSRC may require additional actions or services beyond the four-pack of services during the RESEA appointments. When this happens, those services must be manually attached to the event calendar by CSRC RESEA program staff, and appropriate case notes must be entered in accordance with the [Employ Florida Service Code Guide for Jobseeker Services](#).

a. Resulting Attendance

RESEA appointments must be resulted to reflect the participant’s attendance or non-attendance on the appointment date. A participant’s benefits may be adversely impacted if staff does not result their non-attendance timely. Adverse impacts may include:

- 1) The participant could erroneously lose benefits.
- 2) The participant could receive a payment during the period of ineligibility, e.g., they were a no-show, but staff did not result the participant’s attendance timely, potentially creating an overpayment.

CSRC RESEA program staff must document the failure of a participant to engage in or complete any of the required RESEA services in the case file.

Any participants who fail to report for their initial RESEA appointment must be resulted as a “no show.” Pursuant to UIPL 08-24, Section d.ii.: An individual may not be found ineligible for RA for failure to report for

any [week] time in which no RESEA services were available. FloridaCommerce is aware that certain instances may preclude services, such as a natural disaster, planned office closures, holidays, etc.

When disasters or other situations occur that are beyond the control of the CSRC, CSRC must notify FloridaCommerce via email at RESEA@commerce.fl.gov within one business day of the occurrence. The notification must include the reason services are not available, and a date by which CSRC expects to restart services. CSRC must provide a list of participants affected by the lack of services so that FloridaCommerce can ensure there is not an adverse impact to benefits.

If CSRC permanently closes or inactivates an office that usually holds RESEA services, CSRC must notify FloridaCommerce via the above email at least two weeks prior to the planned closure/inactivation. CSRC must submit to FloridaCommerce a statement on how it plans to provide services to RA claimants selected for RESEA in the impacted area and explain how it will maintain its current performance.

b. Rescheduling Appointments

Participants who make a request to reschedule their initial appointment must be allowed to do so. The appointment must be rescheduled in the event calendar in Employ Florida and completed within 30 calendar days of the originally scheduled date. CSRC RESEA program staff must advise participants that failure to complete the appointment within the allotted 30 days may adversely impact their benefits. CSRC RESEA program staff must also advise participants that they will not be permitted to reschedule their appointment after the 30-day period has passed, unless extenuating circumstance (e.g. death in the immediate family, natural disaster, unexpected office closure, etc.) occur, and approval is granted by FloridaCommerce staff.

CSRC RESEA program staff must allow customers who receive a disqualification through the RA process to reschedule their appointment. Once those customers complete the rescheduled appointment, CSRC must submit an email to: RESEA@commerce.fl.gov to notify FloridaCommerce of the completion. The email must include the participant's name, state ID, the date appointment was completed and notification that the participant was disqualified and rescheduled due to the disqualification.

CSRC RESEA program staff must reschedule customers through the event calendar in Employ Florida. Staff must enter a case note into Employ Florida to document the reason for the reschedule, and any additional details to support the rescheduling. Participants may access other career services at any time, regardless of whether they complete their RESEA appointment.

c. Exemptions

If a participant fails to attend an RESEA appointment or notify CSRC RESEA program staff of an exemption prior to an appointment, then staff must record "no show" in Employ Florida and document the exemption in the event calendar. If an exemption is recognized after an appointment, then staff must case note the exemption. Following are exemption reasons that may be applied to RA claimants selected for RESEA:

- 1) Individuals who are attached to regular jobs.
- 2) Individuals who are temporarily unemployed due to lack of work and have a fixed or approximate return-to-work date within six weeks.
- 3) Individuals who are non-Florida residents.
- 4) Individuals who are in training approved by FloridaCommerce RA staff, including WIOA.
- 5) Individuals who have to appear for jury duty screening and/or performing the service of jury duty, as evidenced by documentation from the court.

- 6) Individuals who are union members who customarily obtain employment through a union hiring hall. The career center staff must obtain from the participant and document the union hiring hall local number.
- 7) Individuals who are unemployed as a result of a temporary layoff or who are claiming benefits under an approved short-time compensation plan.
- 8) Individuals who are unable to complete the online work registration due to illiteracy, physical or mental impairment, a legal prohibition from using a computer, or a language impediment. If a person is exempted from the online work registration, then the filing of his or her claim constitutes registration for work.

d. Reporting Employment

When a participant reports employment before, during or after any RESEA appointment, CSRC RESEA program staff must verify and record the employment in Employ Florida with the service code for Obtained Employment. Staff must not require a participant who is working full time to participate in an RESEA appointment. The participant must be marked as a “no show” with reason of “employment.”

6. Integration with other Workforce Programs

One of the statutory goals of the RESEA program is to serve as an entry point for individuals receiving RA into other workforce system partner programs. CSRC must support this goal by ensuring that the RESEA program is integrated into the workforce system broadly to enable participants’ access to the full range of services offered through the one-stop delivery system. RESEA must supplement rather than supplant current reemployment activities provided by the workforce system.

Participants who are deemed unlikely to return to a previous industry or occupation indicated as declining are also qualified to receive WIOA Dislocated Worker (DW) services.

7. Staffing Requirement

CSRC must use state merit staff to provide Wagner-Peyser Act Employment Service (ES) services. Employment Services include, but are not limited to:

- a. Job search assistance
- b. Career counseling
- c. Job listings
- d. Job placement assistance
- e. Reemployment assistance services
- f. Recruitment services
- g. Labor market information
- h. Training referrals

There is no merit staffing requirement for providing RESEA services. RESEA may be provided by any appropriately trained staff. The RESEA services may be delivered by qualified and trained merit staff, WIOA staff or other career center staff. However, CSRC must ensure that staff providing RESEA services have attended and received sufficient training from RA staff before conducting the eligibility review and making referrals to RA merit staff for adjudication. Training will be provided no less than annually by FloridaCommerce, and LWDBs will receive advance notification of training dates to allow time to plan for staff attendance.

Decisions regarding RA eligibility determinations and redeterminations resulting from issues identified through RESEA participation must be made by RA merit staff only.

AGENDA ITEM SUMMARY

Title	Review and Approve the Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker - Program Framework and Design Policy
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	WIOA, Public Law 113-128; 20 Code of Federal Regulations (CFR) Section 680; 29 CFR Parts 31 and 38; TEGL 10-16, Change 3 Attachment 7, Table A; Training and Employment Guidance Letter (TEGL) 16-16; TEGL No. 19-16; Training and Employment Notice (TEN) No. 13-24; Training and Employment Guidance Letter (TEGL) 07-20.
Action Requested	Review and Approve the WIOA Adult and Dislocated Worker Program - Framework and Design Policy
Background	<p>WIOA embraces a vision to strengthen talent pipelines and workforce systems by providing a foundational platform which supports an integrated service delivery system and increases access to a workforce system that is universally accessible, customer-centered and employment driven.</p> <p>The Adult and Dislocated Worker programs provide training and employment services to WIOA-eligible participants. The one-stop delivery system is the basic delivery system for such services. Through this system, adults and dislocated workers can access a continuum of services that range from access to self-service information about job postings, labor market information, available training programs, etc., to occupational skills training and work-based learning opportunities for high skill, high demand jobs. LWDBs and local career centers work collaboratively with economic development, industry and business partners to determine the talent needs for the local economy, and with educational institutions, service agencies, and other workforce partners to ensure that the mix of services available to job seekers can meet those talent needs and engage program participants in career pathways that lead to self-sufficiency.</p> <p>Staff created CSRC's local policy to align with Administrative Policy Number 127 - Adult and Dislocated Worker Program Framework and Design, which became effective on 5/21/2025 and outlines services provided through the Adult and Dislocated Worker Programs under WIOA and the Wagner-Peyser Act Employment Service.</p>
Staff Recommendations	Review and Approve the WIOA Adult and Dislocated Worker Program - Framework and Design Policy
Supporting Material	WIOA Adult & Dislocated Worker Program - Framework and Design Policy
Board Staff	<p>Tracey McMorris Vice President of Operations/COO tmcmorris@careersourcerc.com (866) 482-4473 ext. 528</p>



PURPOSE

The purpose of this policy is to stipulate the requirements for the framework and design of the Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker (DW) Programs at Local Workforce Development Board (LWDB) 20, CareerSource Research Coast (CSRC).

BACKGROUND

WIOA embraces a vision to strengthen talent pipelines and workforce systems by providing a foundational platform which supports an integrated service delivery system and increases access to a workforce system that is universally accessible, customer-centered and employment driven.

The Adult and Dislocated Worker (A/DW) programs provide training and employment services to WIOA-eligible participants. The one-stop delivery system is the basic delivery system for such services. Through this system, adults and dislocated workers can access a continuum of services that range from access to self-service information about job postings, labor market information, available training programs, etc., to occupational skills training and work-based learning opportunities for high skill, high demand jobs. LWDBs and local career centers work collaboratively with economic development, industry and business partners to determine the talent needs for the local economy, and with educational institutions, service agencies, and other workforce partners to ensure that the mix of services available to job seekers can meet those talent needs and engage program participants in career pathways that lead to self-sufficiency.

I. LOCAL POLICY

WIOA authorizes a continuum of career services and training services for adults and dislocated workers. Career Planners must assess each participant and determine the most appropriate mix of these services to offer to participants. Career Planners must identify the assessments to be used to determine eligibility and must ensure eligibility determination procedures are consistent with state policies. Career Planners may use recent (within the most recent six months) interviews, evaluations, or assessments, including those used by partner programs, when available, rather than creating a new document.

A. Career Services

As identified in 20 CFR 678.430, there are three types of career services: basic career services, individualized career services, and follow-up services. CSRC must ensure that career services are available in at least one physical, comprehensive career center in their local area. Career services also may be available at affiliated sites or at specialized centers.

Career Planners must ensure that adults and dislocated workers who receive services funded under WIOA are registered in Employ Florida and are eligible for either the adult or dislocated worker program prior to the provision of individualized career services, training services or follow-up services.



1. Basic Career Services

Basic career services are universally accessible and may be provided to individuals in the Adult, Dislocated Worker, and Wagner Peyser programs. Basic career services do not require significant staff involvement. Basic career services include:

- “Information-Only Services or Activities” (i.e., those services or activities that have readily available information that does not require an assessment by a staff member of the individual’s skills, education, or career objectives); and
- “Self-Service” (i.e., services or activities that an individual accesses independently and without the assistance of a staff member for any workforce development system program’s information and activities in either a physical location, such as a career center resource room or partner agency, or remotely via the use of electronic technologies).

Basic career services that must be made available at a minimum are:

- a. Program eligibility determinations.
- b. Outreach, intake (including identification through the state’s Worker Profiling and Reemployment Services system of Reemployment Assistance (RA) claimants likely to exhaust benefits), and orientation to information and other services available through the one-stop delivery system. Temporary Assistance for Needy Families (TANF) program individuals must be provided with the opportunity to initiate an application for TANF assistance and non-assistance benefits and services.
- c. Initial assessment of skill levels, including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and supportive service needs.
- d. Labor exchange services, including job search and placement assistance, and, when needed by an individual, career counseling, including the provision of:
 - 1) Information on in-demand industry sectors and occupations.
 - 2) Information on nontraditional employment.
 - 3) Information from career profiles and interest inventories.
- e. Referrals to, and coordination of activities with, other programs and services.
- f. Workforce and labor market employment information, including:
 - 1) Job vacancy listings in labor market areas.
 - 2) Information on job skills necessary to obtain the vacant jobs listed.
 - 3) Information relating to local occupations in-demand; and the earnings, skill requirements, and opportunities for advancement for occupations in-demand.
- g. Provision of performance information and program cost information on eligible providers of training services by program and type of providers and workforce services by program and type of providers.
- h. Provision of information about how the local area is performing on local performance accountability measures, as well as any additional performance information relating to the area’s CareerSource network.
- i. Provision of information relating to the availability of supportive services or assistance, and appropriate referrals to those services and assistance.



- j. Assistance in establishing eligibility for financial aid assistance for training and education programs not provided under WIOA.
- k. Provision of information and assistance regarding filing claims under RA programs, including meaningful assistance (which triggers WIOA participation) to individuals seeking assistance in filing a claim. "Meaningful assistance," as described in Unemployment Insurance Program Letter (UIPL) 20-15 and 20 CFR 678.430, 34 CFR 361.430, and 34 CFR 463.430, means providing assistance as follows:
 - 1) Only merit staff (State government employees) may, in person at career centers or remotely, answer questions, provide advice, or make decisions that could affect claimants' RA eligibility. However, other career center staff may assist in claims by acceptance of information from claimants.
 - 2) If an individual in a career center is referred to a telephone for RA claims assistance, it must be a phone line dedicated to serving RA customers in a timely manner. Individuals must not simply be referred to a general information/dial-in line with the state RA agency contact center where the individual is placed into a phone queue along with all other claimants in the State. If the assistance is provided remotely using technology, it must be a technology that enables trained staff to provide the assistance.
 - 3) The costs associated in providing meaningful assistance may be paid for by the State's RA program, the WIOA Adult or Dislocated Worker programs, Wagner-Peyser, or some combination of these programs.

See the [Employ Florida Service Code Guide for Jobseeker Services](#) for the specific service code and case note/documentation requirements for basic career services.

2. Individualized Career Services

Individualized career services must be made available to a participant after staff determine that such services are required by the participant to retain or obtain employment. Individualized career services involve significant staff time and must be customized to each individual's need.

Individualized career services include but are not limited to:

- Comprehensive and specialized assessments of the skill levels and service needs, such as diagnostic testing and use of other assessment tools, and in-depth interviewing and evaluation.
- Development of an individual employment plan.
- Group counseling, which involves two or more participants.
- Individual counseling
- Career planning
- Short-term pre-vocational services, including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct services.
- Internships and work experiences (including transitional jobs).



- Workforce preparation activities.
- Financial literacy services
- Out-of-area job search assistance and relocation assistance.
- English language acquisition and integrated education and training programs

Individualized career services trigger and extend participation.

Career planners can only record service codes for these services with the knowledge and current agreement of the participant.

See the [Employ Florida Service Code Guide for Jobseeker Services](#) for the specific service code and case note/documentation requirements for individualized career services.

a. Objective Assessment Summary

The Objective Assessment Summary (OAS), which is a documented evaluation of the academic and occupational skills, career interests, personal needs, and developmental needs of the participant, is a crucial tool that helps Career Planners and participants make informed decisions. The OAS must include a review of prior work experience; aptitudes for both traditional and nontraditional careers; academic history; basic skills; work readiness, and barriers to employment. Career Planners must document any formal or informal assessment and/or testing used to gauge an individual's current knowledge, skills and abilities.

The OAS wizard in Employ Florida must be fully completed by Career Planners for program participants. Should there be instances where the system is not available (i.e. system disruptions/outages), Career Planners may use other assessment tools, given the chosen assessment tool contains the same information as the system-generated OAS. Additionally, Career Planners must update the system as soon as it is available but no later than 15 days from the date the service was provided.

When a participant completes the background wizard and/or resume' builder, some of the participant's information will automatically populate into the OAS. As a result, limited information will need to be inputted to complete the OAS. Career Planner must review the results of the OAS with the participant to make certain the information was accurately documented.

Participants enrolled in or receiving services from a partner program may already have a previously completed OAS in Employ Florida. A new OAS is not required if the OAS was completed within the last six months. If the participant has an open OAS, then the Career Planner must work with the partner program and update the OAS to incorporate new components.

b. Individual Employment Plan

Career Planners must establish an Individual Employment Plan (IEP) for each participant in the WIOA Adult and Dislocated Worker program. The provision of individualized



career services must be based on the employment needs of the participant and documented in an IEP, as appropriate. The IEP is a negotiated agreement between the participant and the program 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 to identify employment goals, achievement objectives, and an appropriate combination of services for the participant to achieve the stated employment goals. The IEP must include at least one short term goal (less than one year in duration) and one long term goal (one year or longer in duration). The Career Planner must work with the participant to outline the steps necessary to achieve each goal. The IEP must address any barriers that may prohibit the participant from achieving the goals.

If the participant has an existing IEP in Employ Florida, the Career Planner must determine if the IEP is still active and work with the program partner who created the existing IEP to determine if the plan should be closed or will require joint coordination. An IEP that is coordinated across multiple programs requires constant communication between the Career Planner and partner program staff to maximize the effectiveness of the plan and prevent the duplication of services.

The IEP must be created using the Employ Florida IEP/Service Strategy wizard. If there are instances where the system is not available (i.e. system disruptions/outages), then Career Planners may use locally created IEPs, given the document contains the same information as the system-generated IEP. Additionally, Career Planners must update the system as soon as it is available but no later than 15 days from the date the service was provided. Instructions on how to create an IEP using the Employ Florida IEP/Service Strategy wizard are available in the [Virtual OneStop® User Guide for Staff, Section 4: Individuals - Case Management](#). The IEP must be printed and signed by both the participant and Career Planner. A copy of the IEP must be retained in the participant's file. The Career Planner should provide the participant a copy of the signed IEP.

c. Statutory Priority for Adult Funds

WIOA establishes a priority requirement with respect to WIOA adult local formula funds and state-level grants when using such funds to provide individualized career services and training services, CSRC must give priority to recipients of public assistance, low-income individuals, and individuals who are basic skills deficient (including English language learners) for individualized career services and training services. CSRC must prioritize services to these populations at all times, regardless of the amount of funds available to provide services in the local area.

Please refer to [Administrative Policy 105 – Priority of Service](#) for the requirements for providing priority of service under WIOA.

Additionally, veterans and eligible spouses (covered persons) must receive priority of service over non-covered persons for all U.S. Department of Labor (USDOL) funded job



training programs, including WIOA programs. This means that veterans and eligible spouses either receive access to a service earlier in time than a non-covered person or, if the resource is limited, the veteran or eligible spouse receives access to the service instead of or before the non-covered person. Veterans and eligible spouses who receive priority of service must meet all WIOA Adult program eligibility requirements. Under the priority of service provisions of the Jobs for Veterans Act (38 USC 4215(a) – (b) and [20 CFR Section 1010.200](#), separating service members who, upon discharge, meet the eligibility criteria for dislocated workers must be afforded priority over non-veterans. Please see [Administrative Policy 111 – Priority of Service for Veterans and Eligible Spouses](#) for specific requirements.

d. **Employment Status Clarification**

CSRC may provide services to Adults or Dislocated Workers who are considered underemployed. Examples of underemployed individuals include:

- 1) Individuals employed less than full-time who are seeking full-time employment.
- 2) Individuals who are employed in a position that is inadequate with respect to their skills and training.
- 3) Individuals who are employed who meet the definition of a low-income individual as defined in WIOA section 3(36).
- 4) Individuals who are employed, but whose current job's earnings are not sufficient compared to their previous job's earnings from their previous employment.

CSRC may provide services to a dislocated worker individual who is dislocated from a full-time job, but who has found part-time, bridge or income maintenance employment.

See CSRC's WIOA Adult and Dislocated Worker Program Framework and Design Procedure for serving individuals who are underemployed.

e. **Supportive Services and Needs-Related Payments**

Supportive services are those services necessary to enable an individual to participate in career services or training services. Career Planners must engage in resource and service coordination to ensure participants receive supportive services, either as part of an IEP/ISS, through co-enrollment or thorough referral to community partners, whenever possible. Supportive services may be made available to any adult or dislocated worker participating in Title I career services or training activities who is unable to obtain supportive services through other programs providing such services. Additionally, the supportive services must be reasonable and necessary to enable the individual to participate in career services or training activities. WIOA requires that adults and dislocated worker individuals be participants to receive supportive services. Thus, CSRC may not fund supportive services with WIOA funds as follow-up services to adult and dislocated worker participants.



The provision of supportive services must be documented in the participant's IEP/ISS. Additional requirements governing supportive services are prescribed in [Administrative Policy Number 109: Supportive Services and Needs-Related Payments](#).

3. **Work-Based Learning and Work-Based Training**

Work-based learning activities include on-the-job training, customized training, incumbent worker training, registered apprenticeships, pre-apprenticeships, transitional jobs, work experience, and internships. Of these work-based learning activities, on-the-job training, customized training, incumbent worker training, and registered apprenticeships are also considered work-based training.

The following work-based learning activities are considered individualized career services under WIOA: work experience and internships, transitional jobs, and pre-apprenticeship programs. See [Workforce Policy Number 100: Work-Based Training and Work-Based Learning Opportunities](#) for details and requirements on this topic.

B. **Training Services**

Career Planners, after conducting an interview, an evaluation, or assessment, and career planning, may provide training services to adult and dislocated worker participants, who:

- 1) Are 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, are in need of training services to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment and have the skills and qualifications to successfully participate in the selected program of training services;
- 2) Are unable to obtain grant assistance from other sources to pay the costs of such training, including such sources as State-funded training funds or Federal Pell Grants established under Title IV of the Higher Education Act of 1965, or requires WIOA assistance in addition to other sources of grant assistance, including Federal Pell Grants;
- 3) Are members of a worker group covered under a petition filed for TAA and are awaiting a determination. If the petition is certified, the worker may then transition to TAA approved training. If the petition is denied, the worker will continue training under WIOA;
- 4) Are determined eligible in accordance with the adult statutory priority, if training services are provided through the WIOA Adult local formula funding stream; and
- 5) Selected a program of training services that is directly linked to the employment opportunities in the local area, or in another area to which the individual is willing to commute or relocate.



Training services must be documented in the IEP. Additionally, training services, when determined appropriate, must be funded either through an Individual Training Account (ITA) or through a training contract. Except in certain instances listed in WIOA sec. 122(h) and 20 CFR 680.320, training services must be provided by an Eligible Training Provider (ETP) in accordance with WIOA sec. 122(d). Section 445.003(3)(a)(1), F.S. requires that a minimum of 50 percent of the Adult and Dislocated Worker formula funds expended annually must be used to provide training services but LWDBs are allowed an automatic waiver which may reduce this to 30 percent, which CSRC regularly requests based on its historical data. The waiver process is detailed in [Administrative Policy 074 Individual Training Account Expenditure Requirements and Waiver Request Process](#).

CSRC must use the standardized contract template approved by CareerSource Florida and distributed 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 training provider 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.

C. Follow-up Services

Follow-up services must be made available, as determined appropriate by the Career Planner, to adults and dislocated worker participants who are placed in unsubsidized employment, for up to 12 months after the first day of employment. Follow-up services cannot be given to participants, as follow-up services are only available to individuals who are no longer participating in a WIOA program. Conversely, follow-up services do not extend the date of exit in performance reporting. Follow-up services for Adult and Dislocated Worker participants may begin immediately following placement into unsubsidized employment if it is expected that the participant will not receive any future services. To ensure participants receive the full benefit of follow-up services, Career Planners must begin follow-up services within the first quarter after exit, or as soon as the information is received.

The types of follow-up services provided, and the duration of services must be determined based on the needs of the individual. Follow-up services must include more than an attempted contact, or a contact made to secure documentation for reporting a performance outcome. Follow-up services must be documented as one of the services listed as an “F” code in the [Employ Florida Service Code Guide for Jobseeker Services](#).

Career Planners must enter a case note when follow-up services are refused by a participant or the participant cannot be located. Additionally, follow-up attempts must be documented in a case note.

See the [Employ Florida Service Code Guide for Jobseeker Services](#) for the specific service code and case note/documentation requirements for follow-up services.



D. Nondiscrimination

Section 188 of WIOA prohibits discrimination against individuals who apply to, participate in, work for, or come into contact with programs and activities that receive financial assistance under Title I of WIOA. This includes programs and activities operated by one-stop partners (both required and additional partners) to the extent that these programs and activities are being conducted as part of the one-stop delivery system. It prohibits discrimination on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief and, for WIOA beneficiaries, applicants, and participants only, an individual's citizenship status or participation in a WIOA Title I-financially assisted program or activity.

E. Co-Enrollment

Co-enrolling WIOA participants in multiple core programs aims to provide comprehensive support by leveraging resources and services from different programs to better meet the needs of individuals seeking employment and training assistance. Co-enrollment allows participants to benefit from the combined strengths of these programs, such as receiving both job training and educational services simultaneously. This integrated approach helps improve employment outcomes and ensures that participants receive a more holistic set of services tailored to their specific needs.

1. Coordination with the WIOA Youth Program

Individuals aged 18-24 may be eligible for both the WIOA Youth and Adult programs and can be co-enrolled in the two programs. Such determinations regarding the appropriate program for the participant must be based on the service needs of the participant and if the participant is career-ready based on an assessment of his/her occupational skills, prior work experience, employability, and the participant's needs.

Career Planners must determine, for these individuals, the appropriate level and balance of services under the Youth and Adult programs. An important difference to note here is that while receiving an assessment from the Adult, Dislocated Worker, or ES programs does trigger participation and inclusion in the performance accountability calculations for those programs, an objective assessment carried out under WIOA sec. 129(c)(1)(A) does not trigger participation in the Youth program. Career Planners must identify and track the funding streams which pay the costs of services provided to individuals who are participating in Youth and Adult programs concurrently and ensure no duplication of services. Some examples where enhanced coordination could take place include:

- Referring individuals aged 18–24 to the Title I Youth program if they need more intensive support around specific program elements described under WIOA sec. 129(c)(2).
- Utilizing WIOA Adult formula program funded ITAs as part of a career pathway strategy for Youth program participants co-enrolled as adults or dislocated workers.
- Utilizing work-based training opportunities for Youth program participants co-enrolled as adults or dislocated workers, as identified in their Individual Service Strategy (ISS) as part of a career pathway.
- Career pathway planning.



Career Planners for the Adult and Dislocated Worker programs should also determine the benefit of co-enrollment in the Adult Education and Family Literacy Act and the Vocational Rehabilitation programs.

2. Coordination with Trade Adjustment Assistance (TAA)
Consistent with guidance issued in TEGL 13-21, CSRC is to continue serving trade-effective workers from groups certified prior to July 1, 2022. These individuals may also be eligible for Dislocated Workers. See [Administrative Policy Number 116: Trade Adjustment Assistance and Workforce Innovation and Opportunity Act Dislocated Worker Co-enrollment](#) for details and requirements on this topic.
3. Coordination with Reemployment Services and Eligibility Assessment (RESEA)
Reemployment Services and Eligibility Assessment (RESEA) program participants who are deemed unlikely to return to a previous industry or occupation indicated as declining are also qualified to receive WIOA Dislocated Worker (DW) services.

F. Timely and Accurate Data Entry into Employ Florida

FloridaCommerce is required to submit data quarterly to the USDOL, for individual records that include demographic information, information on services received and outcomes for each reportable individual and program participant. Failure to enter data timely into Employ Florida may result in decreased performance for a local area.

Career Planners must enter all information related to services provided to individuals and activities completed by WIOA participants in a timely manner. A best practice would be to enter the information on the same day a service is provided; however, all information and corresponding service codes must be entered into Employ Florida no later than the 15th day after a service is rendered.

Dates of services recorded in Employ Florida must reflect the date of actual service. Service codes recorded in Employ Florida must align with the services defined in the [Employ Florida Service Code Guide for Jobseeker Services](#).

Agenda Item 6

AGENDA ITEM SUMMARY

Title	LWDB 20 Final Budget - PY2025-2026
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Workforce Innovation & Opportunity Act: Role of Local Workforce Boards
Action Required	Review and Approve LWDB 20 Final Budget - PY 2025-2026
Background	<p>Each year, the Board approves a budget for the following program year. Board Staff has received final allocations for the WIOA, Wagner Peyser, and Welfare Transition programs for PY 2025-2026. The Finance department met with Executive Management staff and drafted a final budget to present to the Board of Directors based on this information.</p> <p>Attached is a copy of the final budget for the Executive Committee's review and approval. The Board will have the opportunity to approve the 2025-2026 final budget at the September 24, 2025 meeting.</p>
Staff Recommendation	Review and Approve LWDB 20 Final Budget - PY 2025-2026
Supporting Materials	LWDB 20 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 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.

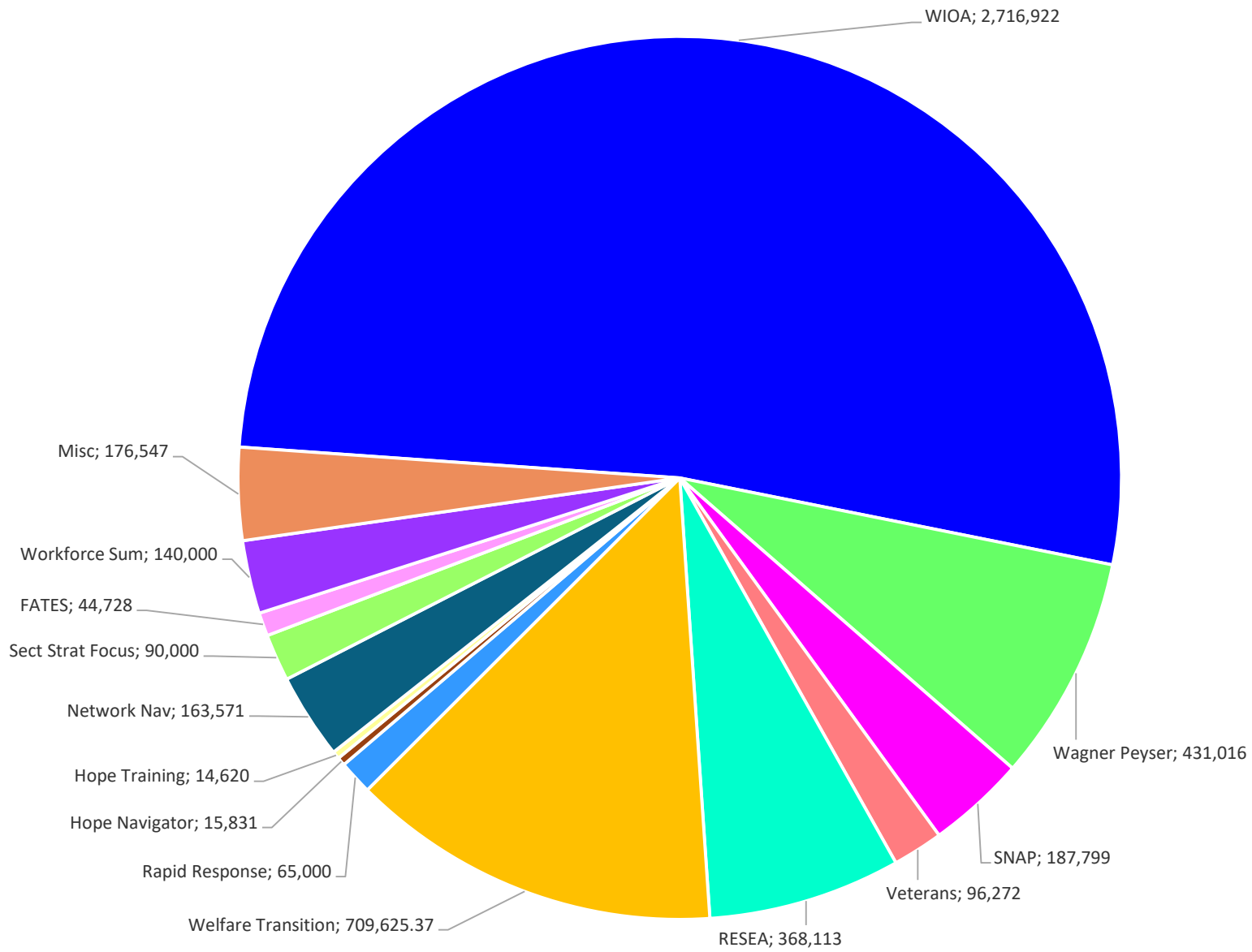
LWDB 20
PY 25-26 DRAFT Budget

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	\$ 6,036,719		\$ 1,167,001	\$ 667,134	\$ 949,630	\$ -	\$ 804,045	\$ 231,203	\$ 214,646	\$ 202,538	\$ 298,261
PY 25-26 Supplemental	\$ 121,430		\$ -	\$ 121,430	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries	\$ (677,605)		\$ -	\$ -	\$ -	\$ -	\$ (345,868)	\$ -	\$ (172,980)	\$ (158,757)	\$ -
Carryforward to PY 26-27	\$ (2,516,454)			\$ (1,088,896)	\$ (327,261)	\$ -	\$ (327,591)	\$ (161,540)			\$ (65,846)
Carryforward from PY 24-25	\$ 2,034,681		\$ -	\$ 863,556	\$ 322,276	\$ 42,052	\$ 300,430	\$ 118,136	\$ 6,577	\$ 4,248	\$ 135,698
Total DEO Grant Funding	\$ 4,998,771	\$ -	\$ 1,167,001	\$ 563,224	\$ 944,645	\$ 42,052	\$ 431,016	\$ 187,799	\$ 48,243	\$ 48,029	\$ 368,113
OTHER NON DEO REVENUES	\$ 221,275										
Total Available Funding	\$ 5,220,045	\$ -	\$ 1,167,001	\$ 563,224	\$ 944,645	\$ 42,052	\$ 431,016	\$ 187,799	\$ 48,243	\$ 48,029	\$ 368,113
Budgeted Expenditures:											
Administrative	\$ 548,372	\$ 0	\$ 239,398	\$ 14,867	\$ 28,983	\$ -	\$ 12,306	\$ 22,852	\$ 5,728	\$ 5,619	\$ 44,942
Salaries and Benefits	\$ 402,460	\$ 402,460	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 145,912	\$ 145,912	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ 0	\$ (548,372)	\$ 239,398	\$ 14,867	\$ 28,983	\$ -	\$ 12,306	\$ 22,852	\$ 5,728	\$ 5,619	\$ 44,942
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ 4,671,676	\$ 0	\$ 927,603	\$ 548,357	\$ 915,663	\$ 42,052	\$ 418,711	\$ 164,948	\$ 42,515	\$ 42,410	\$ 323,172
WIOA Youth Contracts	\$ 750,000	\$ -	\$ -	\$ -	\$ 750,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 2,228,511	\$ 268,843	\$ 798,385	\$ 70,394	\$ 17,943	\$ -	\$ 26,035	\$ 122,513	\$ 4,938	\$ 6,204	\$ 258,593
Contract Labor	\$ 9,347	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ 14,198	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ 10,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services ITA	\$ 54,895	\$ -	\$ 44,625	\$ 1,859	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ 279,330	\$ -	\$ 205,277	\$ 8,553	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-OJT	\$ 320,746	\$ -	\$ 307,916	\$ 12,830	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ 104,448	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 16,190	\$ -	\$ 3,800	\$ 100	\$ 265	\$ -	\$ 210	\$ 550	\$ 5,300	\$ 3,000	\$ 200
One Stop Shared Costs	\$ 402,021	\$ -	\$ 89,714	\$ 4,270	\$ 78,835	\$ -	\$ 43,463	\$ 16,617	\$ 26,155	\$ 27,206	\$ 24,193
Other Operating Expenses	\$ 481,990	\$ 96,738	\$ 120,177	\$ 5,600	\$ 49,299	\$ -	\$ 15,799	\$ 10,034	\$ 2,304	\$ 2,255	\$ 10,225
Allocated Program Indirect	\$ (0)	\$ (365,581)	\$ 159,599	\$ 9,912	\$ 19,322	\$ -	\$ 8,204	\$ 15,234	\$ 3,819	\$ 3,746	\$ 29,961
Reclassification	\$ -	\$ -	\$ (801,891)	\$ 434,839	\$ -	\$ 42,052	\$ 325,000	\$ -	\$ -	\$ -	\$ -
Total Planned Expenditures	\$ 5,220,045	\$ 0	\$ 1,167,001	\$ 563,224	\$ 944,645	\$ 42,052	\$ 431,016	\$ 187,800	\$ 48,244	\$ 48,029	\$ 368,114
	0	0	0	0	0	0	0	0	0	0	0

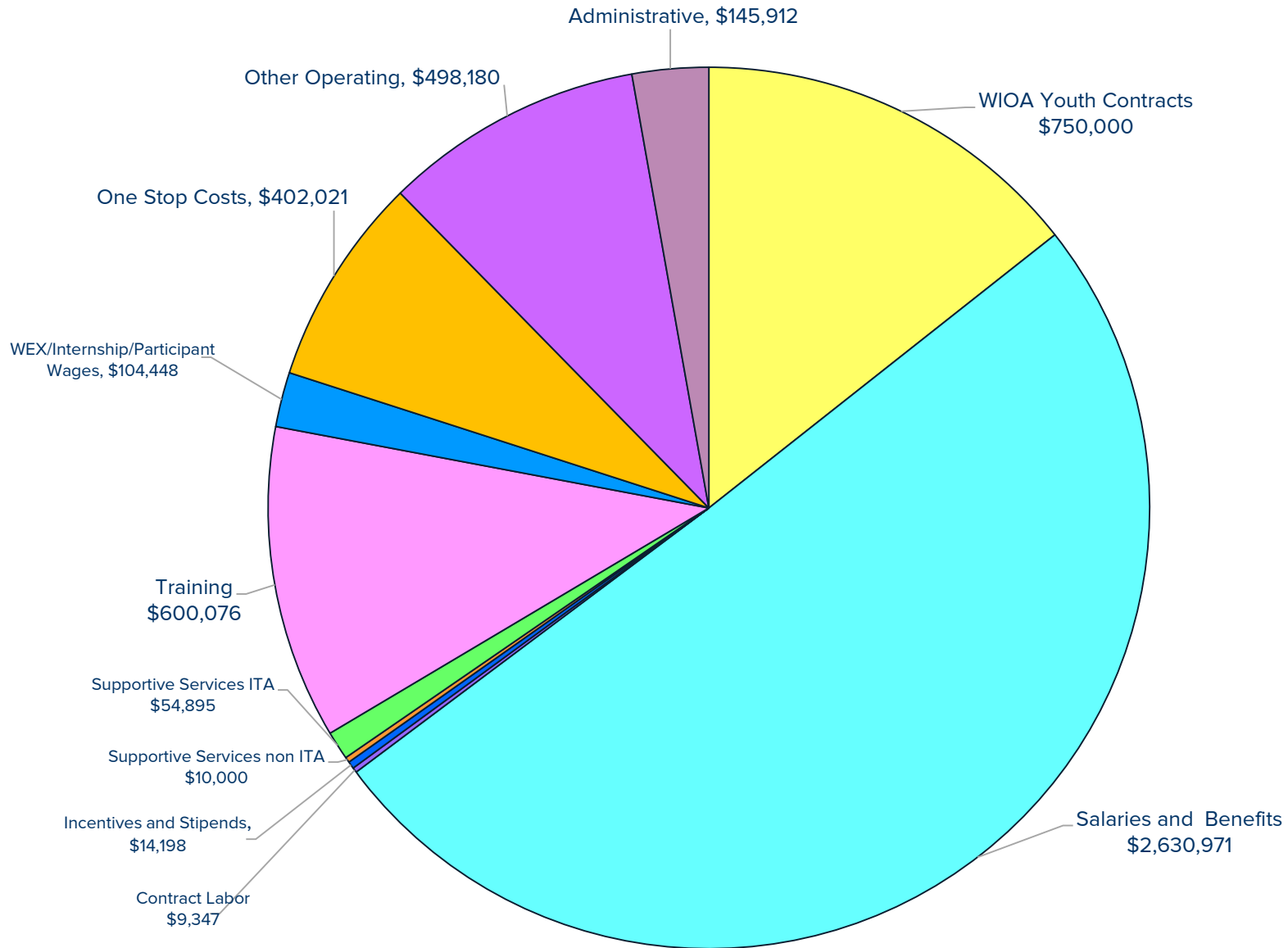
LWDB 20
PY 25-26 DRAFT Budget

Budget for PY 25-26	40 WTP	474 Rapid Response Navigator	476 Hope Navigator	477 Hope Training	478 Network Navigators	479 Sectors of Strategic Focus	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	\$ 65,000	\$ -		\$ 163,571	\$ 90,000	\$ -	\$ 140,000	\$ -	\$ -	\$ 6,036,719
PY 25-26 Supplemental	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 121,430
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (677,605)
Carryforward to PY 26-27	\$ (545,320)		\$ -		\$ -	\$ -	\$ -	\$ -		\$ -	\$ (2,516,454)
Carryforward from PY 24-25	\$ 211,255	\$ -	\$ 15,831	\$ 14,620	\$ -		\$ -	\$ -	\$ -	\$ -	\$ 2,034,681
Total DEO Grant Funding	\$ 709,625	\$ 65,000	\$ 15,831	\$ 14,620	\$ 163,571	\$ 90,000	\$ -	\$ 140,000	\$ -	\$ -	\$ 4,998,771
OTHER NON DEO REVENUES							\$ 44,728	\$ -	\$ 165,000	\$ 11,547	\$ 221,275
Total Available Funding	\$ 709,625	\$ 65,000	\$ 15,831	\$ 14,620	\$ 163,571	\$ 90,000	\$ 44,728	\$ 140,000	\$ 165,000	\$ 11,547	\$ 5,220,045
Budgeted Expenditures:											
Administrative	\$ 86,837	\$ 8,045	\$ 1,796	\$ 1,811	\$ 20,264	\$ 10,283	\$ 5,540	\$ 17,344	\$ 20,414	\$ 1,344	\$ 548,372
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 402,460
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 145,912
Allocated Indirect Costs	\$ 86,837	\$ 8,045	\$ 1,796	\$ 1,811	\$ 20,264	\$ 10,283	\$ 5,540	\$ 17,344	\$ 20,414	\$ 1,344	\$ (0)
Reclassification	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ 622,789	\$ 56,955	\$ 14,036	\$ 12,808	\$ 143,307	\$ 79,718	\$ 39,189	\$ 122,656	\$ 144,586	\$ 10,203	\$ 4,671,677
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 750,000
Salaries and Benefits	\$ 429,459	\$ 41,655	\$ 6,673	\$ 7,991	\$ 115,146	\$ 32,857	\$ 6,040	\$ -	\$ 8,897	\$ 5,945	\$ 2,228,511
Contract Labor	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 9,347	\$ -	\$ 9,347
Incentives/Stipends	\$ 12,000	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ 2,198	\$ -	\$ 14,198
Support Services Non-ITA	\$ 10,000	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 10,000
Support Services ITA	\$ 5,000	\$ -	\$ -	\$ 100	\$ -	\$ 1,000	\$ 2,310	\$ -	\$ -	\$ -	\$ 54,895
Training-ITA/OST/TAA	\$ 10,000	\$ -	\$ -		\$ -	\$ 30,000	\$ 25,500	\$ -	\$ -	\$ -	\$ 279,330
Training-OJT	\$ -	\$ -	\$ -		\$ -		\$ -	\$ -	\$ -	\$ -	\$ 320,746
Training-Cust./Employed Worker	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ 104,448	\$ -	\$ 104,448
Travel	\$ 1,200	\$ 650	\$ 275	\$ -	\$ -	\$ 500	\$ 40	\$ -	\$ 100	\$ -	\$ 16,190
One Stop Shared Costs	\$ 58,399	\$ 6,407	\$ 4,691	\$ 3,054	\$ 9,421	\$ 6,406	\$ 660	\$ -	\$ 2,533	\$ -	\$ 402,021
Other Operating Expenses	\$ 38,840	\$ 2,880	\$ 1,200	\$ 457	\$ 5,230	\$ 2,100	\$ 947	\$ 111,093	\$ 3,453	\$ 3,362	\$ 481,990
Allocated Program Indirect	\$ 57,891	\$ 5,364	\$ 1,197	\$ 1,207	\$ 13,510	\$ 6,855	\$ 3,693	\$ 11,563	\$ 13,609	\$ 896	\$ 0
Reclassification	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Planned Expenditures	\$ 709,625	\$ 65,000	\$ 15,832	\$ 14,620	\$ 163,571	\$ 90,000	\$ 44,728	\$ 140,000	\$ 165,000	\$ 11,547	\$ 5,220,045
	0	0	0	0	0	0	0	0	0	0	\$ 0

PY 25-26 Budget Funding



PY 25-26 Budget Expenditures by Category



Agenda Item 7

AGENDA ITEM SUMMARY

Title	Review and Approve Workforce Innovation Opportunity Act (WIOA) - Subrecipient Services - Youth Services Contract Renewal - PY 2025-2026 (RFP Term 5 of 5)
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Board Policy/Board Responsibility
Action Requested	Review and Approve the Renewal of WIOA Youth Services Subrecipient Contract for PY2025-2026
Background	<p>CareerSource Research Coast entered into a multiple-year sub-recipient procurement for the provision of WIOA Youth Services.</p> <p>CSRC staff will report to the Programs and Services Committee on the intent to renew the WIOA Youth Services contract with the current service provider.</p>
Staff Recommendations	Review and Approve (WIOA) - Subrecipient Services - Youth Services Contract Renewal - PY2025-2026
Supporting Material	<p>WIOA Youth Subrecipient Contract Link:</p> <p>https://careersourcerc.com/wp-content/uploads/2025/09/Eckerd-Youth-Contract-PY-25-26-Draft-7.22.25.pdf</p>
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

Agenda Item 8

AGENDA ITEM SUMMARY

Title	Local Targeted Occupations List (LTOL) for 2nd Quarter of PY 2025-2026
Strategic Goal	Strong Advancement of Existing and Emerging Local Targeted Industry Clusters
Policy/Plan/Law	Workforce Innovation & Opportunity Act
Action Required	Review and Approve the LTOL for the 2nd Quarter of Program Year 2025-2026
Background	<p>The Department of Commerce's (FLORIDACOMMERCE) Bureau of Labor Market Statistics (LMS) has published the 2025-2026 Statewide Targeted Occupations List on the FloridaCommerce website. The Statewide Demand Occupations list identifies the labor market needs of Florida's business community and encourages job training based on those needs, with emphasis on jobs that are both high demand and high skill/high wage, and is used as a baseline for establishing the Local Targeted Occupations Lists (LTOLs). The Local Workforce Development Boards (LWDBs) develop and use their LTOLs to identify occupations for which eligible adults and dislocated workers may receive training assistance under the Workforce Innovation and Opportunity Act.</p> <p>Pursuant to CareerSource Florida policy, LWDBs are to develop their LTOLs, in consultation with local business and industry representatives, using the LMS-generated Demand Occupations Lists, as well as other resources, such as Supply/Demand lists. The LWDBs must publish their updated LTOLs on their websites and update them as they make changes. CareerSource Research Coast adopted a local policy to incorporate CareerSource Florida's LTOL policy and process. As part of our local policy, the LTOL is to be reviewed and approved on a quarterly basis in order to add occupations in demand or delete occupations that are declining.</p>
Staff Recommendation	Staff reviewed local labor market information and resources regarding the LTOL. Staff are recommending no changes to the LTOL for the 2nd Quarter. Staff recommends approval of this LTOL for the 2 nd Quarter of PY 2025-2026.
Supporting Materials	CareerSource Research Coast Local Targeted Occupations List
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

2025-2026 Local Targeted Occupations List

Sorted by Occupational Title

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

Selection Criteria:

- 1LMEC Educational Requirements: 3 (Some College, No Degree), 4 (Postsecondary Non-Degree Award), 5 (Associate Degree), or 6 (Bachelor's Degree)
- 230 annual openings and positive growth
- 3Mean Wage of \$18.67/hour and Entry Wage of \$15.18/hour
- 4High Skill/High Wage (HSHW) Occupations:
Mean Wage of \$29.25/hour and Entry Wage of \$18.67/hour

SOC Code* HSHW** Occupation Title*			Regional				Statewide				LMEC	In	
			Annual % Growth	Annual Openings	2024 Hourly Wage		Annual % Growth	Annual Openings	2024 Hourly Wage		Training Code	Targeted Industry?	Qualifying Level***
					Mean	Entry			Mean	Entry			
132011	HSHW	Accountants and Auditors	1.19	167	41.40	24.55	0.70	9,113	42.00	25.92	6	Yes	R
272011		Actors	N/A	N/A	N/A	N/A	0.79	1,702	25.03	16.16	3	No	S
152011	HSHW	Actuaries	N/A	N/A	N/A	N/A	0.98	103	62.39	36.38	6	Yes	E
113012	HSHW	Administrative Services Managers	0.60	21	49.76	24.64	0.66	1,021	49.49	25.68	6	Yes	N
112011	HSHW	Advertising and Promotions Managers	N/A	N/A	N/A	N/A	0.72	122	54.42	21.85	6	Yes	E
413011		Advertising Sales Agents	-1.03	8	27.15	15.18	0.31	880	33.31	18.10	3	Yes	E
173021	HSHW	Aerospace Engineering and Operations Technologists and Technicians	N/A	N/A	N/A	N/A	0.76	219	40.68	28.68	5	Yes	E
172011	HSHW	Aerospace Engineers	0.82	2	68.31	41.87	0.77	319	61.78	43.05	6	Yes	E
493011	HSHW	Aircraft Mechanics and Service Technicians	1.15	17	32.13	19.35	0.43	1,101	38.11	23.99	5	Yes	E
512011	HSHW	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	N/A	N/A	N/A	N/A	0.72	230	29.91	21.26	4	Yes	E
532022	HSHW	Airfield Operations Specialists	1.39	1	N/A	N/A	0.21	293	39.53	19.70	3	Yes	E
532011	HSHW	Airline Pilots, Copilots, and Flight Engineers	N/A	N/A	N/A	N/A	0.20	886	127.83	58.24	6	Yes	E
171011	HSHW	Architects, Except Landscape and Naval	1.56	7	43.81	29.82	1.08	441	45.50	30.55	6	Yes	E
173011	HSHW	Architectural and Civil Drafters	1.18	20	28.26	20.01	1.15	904	30.12	20.33	5	Yes	S
119041	HSHW	Architectural and Engineering Managers	0.65	5	75.80	50.97	0.61	526	81.64	55.86	6	Yes	E
271011	HSHW	Art Directors	1.52	7	45.47	28.09	0.53	507	47.65	26.29	6	Yes	N
274011		Audio and Video Technicians	0.02	8	27.74	17.45	N/A	N/A	N/A	N/A	5	No	O
493021		Automotive Body and Related Repairers	0.02	22	26.78	19.37	N/A	N/A	N/A	N/A	3	No	O
493023		Automotive Service Technicians and Mechanics	0.87	182	25.51	16.60	0.63	5,620	25.53	16.25	4	No	R
492091	HSHW	Avionics Technicians	N/A	N/A	N/A	N/A	0.46	185	37.87	27.15	5	Yes	E
172031	HSHW	Bioengineers and Biomedical Engineers	N/A	N/A	N/A	N/A	0.45	60	50.69	32.97	6	Yes	E
194021		Biological Technicians	1.03	12	27.03	18.57	0.81	379	24.22	16.53	6	Yes	E
433031		Bookkeeping, Accounting, and Auditing Clerks	0.03	346	24.29	16.91	0.73	15,667	24.42	17.26	3	Yes	R
472021		Brickmasons and Blockmasons	0.03	11	24.68	17.35	N/A	N/A	N/A	N/A	2	Yes	O
434011	HSHW	Brokerage Clerks	N/A	N/A	N/A	N/A	0.40	464	30.15	22.10	3	Yes	E
493031	HSHW	Bus and Truck Mechanics and Diesel Engine Specialists	0.46	26	28.69	20.35	0.59	1,272	30.01	21.21	4	Yes	S
533051		Bus Drivers, School or Special Client	0.01	86	21.61	17.60	N/A	N/A	N/A	N/A	2	Yes	O
533052		Bus Drivers, Transit and Intercity	0.00	30	N/A	N/A	N/A	N/A	N/A	N/A	2	Yes	O
131199	HSHW	Business Operations Specialists, All Other	0.90	92	40.01	20.68	0.80	6,273	44.42	23.16	6	Yes	R
131020	HSHW	Buyers and Purchasing Agents	-0.27	47	33.91	21.11	0.55	3,074	37.40	22.92	6	Yes	S
292031		Cardiovascular Technologists and Technicians	0.21	7	35.78	20.76	-0.02	362	31.22	17.73	5	Yes	E
252032	HSHW	Career/Technical Education Teachers, Secondary School	0.01	9	N/A	N/A	N/A	N/A	30.19	24.18	6	No	E
435011	HSHW	Cargo and Freight Agents	0.02	5	31.91	21.37	N/A	N/A	N/A	N/A	2	Yes	O
472031		Carpenters	0.79	249	23.94	17.91	0.76	6,387	24.13	18.09	4	No	R
472051		Cement Masons and Concrete Finishers	0.03	43	22.94	16.90	N/A	N/A	N/A	N/A	1	Yes	O
351011		Chefs and Head Cooks	1.15	60	29.62	16.95	0.73	2,101	30.07	16.58	5	No	R
518091	HSHW	Chemical Plant and System Operators	N/A	N/A	N/A	N/A	0.10	35	33.18	29.45	5	Yes	E
194031		Chemical Technicians	0.03	5	27.46	17.58	0.57	253	24.78	17.98	5	Yes	E
192031	HSHW	Chemists	0.04	5	51.18	29.45	0.48	150	37.83	23.27	6	Yes	E
211021		Child, Family, and School Social Workers	0.83	60	25.58	18.17	0.89	1,350	27.28	19.68	6	No	R
173022	HSHW	Civil Engineering Technologists and Technicians	0.74	8	26.95	19.49	0.85	304	33.16	21.94	5	Yes	E
172051	HSHW	Civil Engineers	1.27	24	44.91	28.66	0.94	1,234	50.88	30.17	6	Yes	S
131031	HSHW	Claims Adjusters, Examiners, and Investigators	0.44	12	40.92	24.50	0.90	2,512	35.67	23.51	3	Yes	S
292010		Clinical Laboratory Technologists and Technicians	-0.20	100	28.32	18.66	0.38	1,978	29.29	18.07	5	No	S
272022		Coaches and Scouts	1.48	48	28.07	15.46	0.75	2,025	27.93	14.67	6	No	R
499092	HSHW	Commercial Divers	N/A	N/A	N/A	N/A	0.42	51	30.78	20.39	4	Yes	E
532012	HSHW	Commercial Pilots	-0.35	19	66.57	30.90	0.10	860	68.70	34.59	4	Yes	E
211099		Community and Social Service Specialists, All Other	1.13	24	27.98	20.83	0.69	775	28.09	19.25	6	No	N
211094		Community Health Workers	2.08	10	24.51	20.16	1.08	265	24.20	17.28	6	No	N
113111	HSHW	Compensation and Benefits Managers	N/A	N/A	N/A	N/A	0.93	83	60.21	34.52	6	Yes	E
131141	HSHW	Compensation, Benefits, and Job Analysis Specialists	1.74	11	32.89	21.11	0.94	607	34.18	21.50	6	Yes	S
131041	HSHW	Compliance Officers	0.75	44	34.69	20.69	0.63	2,882	38.27	22.20	6	Yes	R
113021	HSHW	Computer and Information Systems Managers	1.71	16	72.90	44.81	1.23	1,978	82.23	52.56	6	Yes	S
172061	HSHW	Computer Hardware Engineers	N/A	N/A	N/A	N/A	1.25	176	59.77	38.14	6	Yes	E
151241	HSHW	Computer Network Architects	0.32	5	56.82	37.26	1.34	554	63.74	42.43	6	Yes	S
151231	HSHW	Computer Network Support Specialists	1.26	13	34.66	22.65	1.11	1,037	36.99	24.37	5	Yes	S
519161		Computer Numerically Controlled Tool Operators	0.61	15	24.56	17.82	0.65	412	22.51	16.90	4	Yes	E
519162	HSHW	Computer Numerically Controlled Tool Programmers	2.59	4	33.62	23.60	0.67	76	33.01	22.17	5	Yes	E
151299	HSHW	Computer Occupations, All Other	1.27	17	49.21	25.44	1.23	1,497	49.66	24.79	6	Yes	S
151251	HSHW	Computer Programmers	-0.63	6	44.92	29.12	1.41	552	49.30	29.19	6	Yes	S
151211	HSHW	Computer Systems Analysts	1.00	22	44.01	28.36	1.31	2,544	51.27	32.30	6	Yes	S
151232	HSHW	Computer User Support Specialists	0.94	61	30.28	19.95	1.28	4,078	30.00	19.66	4	Yes	R
492011		Computer, Automated Teller, and Office Machine Repairers	-0.32	8	21.92	17.11	0.83	654	22.69	17.38	4	Yes	S
474011	HSHW	Construction and Building Inspectors	0.46	35	33.08	22.91	0.89	1,931	33.80	23.00	4	Yes	R
119021	HSHW	Construction Managers	0.82	85	51.79	30.65	0.55	3,437	55.55	31.16	6	No	R
352014		Cooks, Restaurants	0.04	615	17.40	14.18	N/A	N/A	N/A	N/A	2	No	O
131051	HSHW	Cost Estimators	0.37	38	35.65	21.92	0.75	1,477	36.97	22.06	6	Yes	R
273092		Court Reporters and Simultaneous Captioners	0.89	5	27.39	19.74	0.46	190	29.17	19.76	4	No	E
434031		Court, Municipal, and License Clerks	0.57	71	21.64	16.70	0.28	1,227	23.55	17.87	3	No	R
132041	HSHW	Credit Analysts	-1.00	1	45.33	28.78	0.54	299	42.41	26.92	6	Yes	E
152051	HSHW	Data Scientists	3.83	7	51.36	29.88	1.46	694	56.57	32.51	6	Yes	S
151242	HSHW	Database Administrators	0.03	2	41.39	23.82	N/A	N/A	N/A	N/A	6	No	O
151243	HSHW	Database Architects	N/A	N/A	N/A	N/A	1.35	140	66.48	43.10	6	Yes	E
319091		Dental Assistants	1.12	106	21.13	17.52	1.00	3,747	22.44	18.18	4	No	R

2025-2026 Local Targeted Occupations List

Sorted by Occupational Title

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

Selection Criteria:

- 1LMEC Educational Requirements: 3 (Some College, No Degree), 4 (Postsecondary Non-Degree Award), 5 (Associate Degree), or 6 (Bachelor's Degree)
- 230 annual openings and positive growth
- 3Mean Wage of \$18.67/hour and Entry Wage of \$15.18/hour
- 4High Skill/High Wage (HSHW) Occupations:
Mean Wage of \$29.25/hour and Entry Wage of \$18.67/hour

SOC Code* HSHW** Occupation Title*			Regional				Statewide				LMEC	In	Qualifying Level***
			Annual % Growth	Annual Openings	2024 Hourly Wage		Annual % Growth	Annual Openings	2024 Hourly Wage		Training Code	Targeted Industry?	
					Mean	Entry			Mean	Entry			
291292	HSHW	Dental Hygienists	1.14	46	38.95	32.36	1.00	1,101	40.03	34.09	5	No	R
519081		Dental Laboratory Technicians	1.28	7	26.74	18.04	0.81	386	27.83	19.08	4	Yes	E
292032	HSHW	Diagnostic Medical Sonographers	1.51	11	38.80	31.68	0.47	412	39.71	32.95	5	Yes	E
291031	HSHW	Dietitians and Nutritionists	2	7	32.73	25.85	0.34	335	33.74	25.62	6	Yes	E
212021		Directors, Religious Activities and Education	0.07	4	22.92	15.52	N/A	N/A	N/A	N/A	6	No	O
472081		Drywall and Ceiling Tile Installers	0.02	15	21.89	15.59	N/A	N/A	N/A	N/A	1	Yes	O
173012	HSHW	Electrical and Electronics Drafters	N/A	N/A	N/A	N/A	0.82	137	32.78	23.92	5	Yes	E
172071	HSHW	Electrical Engineers	0.11	6	47.48	32.66	0.44	454	54.22	36.06	6	Yes	E
499051	HSHW	Electrical Power-Line Installers and Repairers	0.04	23	43.89	30.96	-0.23	541	40.79	26.70	4	Yes	E
472111		Electricians	1.97	140	26.50	19.71	0.57	4,701	26.68	20.02	4	No	R
173024	HSHW	Electro-Mechanical and Mechatronics Technologists and Technicians	N/A	N/A	N/A	N/A	1.47	94	37.17	26.34	5	Yes	E
172072	HSHW	Electronics Engineers, Except Computer	0.05	7	51.92	41.09	0.78	341	57.90	41.09	6	Yes	E
252021		Elementary School Teachers, Except Special Education	1.16	168	24.89	21.74	0.73	5,262	28.30	22.05	6	No	R
292042		Emergency Medical Technicians	0.83	16	22.61	17.80	0.95	540	20.86	16.43	4	No	S
173029	HSHW	Engineering Technologists and Technicians, Except Drafters, All Other	0.02	6	26.83	18.88	0.94	353	34.82	22.76	5	Yes	E
172199	HSHW	Engineers, All Other	N/A	N/A	46.06	26.58	0.58	663	52.02	31.50	6	Yes	E
119072	HSHW	Entertainment and Recreation Managers, Except Gambling	0.01	12	49.30	27.58	N/A	N/A	N/A	N/A	3	No	O
173025		Environmental Engineering Technologists and Technicians	N/A	N/A	N/A	N/A	1.22	59	22.34	17.28	5	Yes	E
172081	HSHW	Environmental Engineers	1.69	3	45.50	24.93	1.11	142	45.60	26.37	6	Yes	E
194042		Environmental Science and Protection Technicians, Including Health	0.91	6	27.68	18.50	0.38	285	25.79	17.97	5	No	E
192041	HSHW	Environmental Scientists and Specialists, Including Health	0.02	10	30.02	19.28	N/A	N/A	N/A	N/A	6	No	O
436011	HSHW	Executive Secretaries and Executive Administrative Assistants	-1.77	33	30.88	20.77	0.63	2,969	33.54	21.47	3	Yes	S
113013	HSHW	Facilities Managers	0.03	13	47.28	27.41	N/A	N/A	N/A	N/A	6	No	O
119013	HSHW	Farmers, Ranchers, and Other Agricultural Managers	-0.04	25	N/A	N/A	-0.02	4,988	49.87	26.22	6	No	E
512051		Fiberglass Laminators and Fabricators	0.02	54	21.27	18.48	N/A	N/A	N/A	N/A	2	Yes	O
132051	HSHW	Financial and Investment Analysts	0.60	12	51.71	29.09	0.57	1,196	48.38	29.39	6	Yes	N
433099		Financial Clerks, All Other	0.00	3	25.69	16.52	0.52	315	27.97	19.83	3	Yes	E
132061	HSHW	Financial Examiners	1.74	4	47.13	31.95	0.50	280	39.60	24.07	6	Yes	E
113031	HSHW	Financial Managers	1.88	58	81.05	38.61	0.64	2,964	80.69	42.15	6	Yes	R
132054	HSHW	Financial Risk Specialists	0.54	5	47.66	33.77	0.54	309	51.89	30.61	6	Yes	E
132099	HSHW	Financial Specialists, All Other	0.60	7	38.70	22.07	0.55	680	35.25	21.82	6	Yes	N
332011	HSHW	Firefighters	0.56	81	37.03	24.76	0.32	1,810	30.58	19.77	4	No	R
471011	HSHW	First-Line Supervisors of Construction Trades and Extraction Workers	0.69	156	34.93	23.76	0.62	5,875	36.62	24.26	3	No	R
391014		First-Line Supervisors of Entertainment and Recreation Workers, Except Gambling Services	1.06	40	27.38	18.78	0.60	1,090	26.16	17.47	3	No	R
371012		First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers	1.09	99	26.94	18.39	0.83	2,445	26.59	18.59	3	No	R
491011	HSHW	First-Line Supervisors of Mechanics, Installers, and Repairers	0.99	88	35.71	22.89	0.62	3,429	36.60	24.05	3	No	R
411012	HSHW	First-Line Supervisors of Non-Retail Sales Workers	0.24	48	44.04	25.01	0.69	3,210	46.21	26.05	3	Yes	R
431011	HSHW	First-Line Supervisors of Office and Administrative Support Workers	N/A	N/A	N/A	N/A	0.74	11,148	32.90	21.48	3	Yes	S
391022		First-Line Supervisors of Personal Service Workers	1.13	31	21.80	15.24	0.55	1,162	23.82	15.81	3	No	R
331012	HSHW	First-Line Supervisors of Police and Detectives	0.01	19	51.11	42.33	0.25	606	52.01	34.32	6	No	E
511011	HSHW	First-Line Supervisors of Production and Operating Workers	0.67	85	32.61	20.71	0.36	2,480	33.02	21.21	3	Yes	R
411011		First-Line Supervisors of Retail Sales Workers	0.21	277	24.55	16.39	0.47	9,789	24.83	16.46	3	No	R
531047	HSHW	First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	N/A	N/A	N/A	N/A	0.83	4,052	30.63	20.55	3	Yes	S
194013		Food Science Technicians	0.00	2	N/A	N/A	0.40	93	25.51	18.81	5	Yes	E
191012	HSHW	Food Scientists and Technologists	N/A	N/A	N/A	N/A	0.26	27	46.19	24.44	6	Yes	E
119051	HSHW	Food Service Managers	0.50	91	34.00	18.96	0.71	3,453	34.25	20.67	3	No	R
131131	HSHW	Fundraisers	0.06	10	37.85	23.25	N/A	N/A	N/A	N/A	6	No	O
111021	HSHW	General and Operations Managers	0.94	404	53.91	21.20	0.80	17,467	61.83	25.80	6	Yes	R
192042	HSHW	Geoscientists, Except Hydrologists and Geographers	N/A	N/A	N/A	N/A	1.15	55	46.86	27.32	6	Yes	E
472121		Glaziers	0.02	19	26.08	18.74	N/A	N/A	N/A	N/A	2	Yes	O
271024		Graphic Designers	0.77	32	26.63	17.78	0.59	1,601	30.17	19.77	6	Yes	R
211091		Health Education Specialists	0.04	6	29.15	19.57	0.57	396	30.22	18.89	6	No	E
299021	HSHW	Health Information Technologists and Medical Registrars	1.42	5	26.67	18.16	0.65	271	35.58	19.89	4	Yes	E
251071	HSHW	Health Specialties Teachers, Postsecondary	N/A	N/A	N/A	N/A	0.12	714	66.17	29.42	6	No	N
292099		Health Technologists and Technicians, All Other	0.38	18	23.17	17.53	0.87	1,117	23.82	17.82	4	No	S
299099		Healthcare Practitioners and Technical Workers, All Other	0.78	4	N/A	N/A	N/A	N/A	N/A	N/A	4	Yes	E
499021		Heating, Air Conditioning, and Refrigeration Mechanics and Installers	1.96	106	25.33	19.78	0.50	3,559	26.49	19.64	4	No	R
533032		Heavy and Tractor-Trailer Truck Drivers	1.01	266	24.19	18.41	1.06	13,527	26.13	19.15	4	Yes	R
434161		Human Resources Assistants, Except Payroll and Timekeeping	0.42	7	22.11	17.36	0.83	683	23.38	17.88	5	Yes	S
113121	HSHW	Human Resources Managers	1.14	9	61.09	39.60	0.76	816	66.85	39.61	6	Yes	S
131071	HSHW	Human Resources Specialists	1.59	127	33.38	20.74	0.95	5,414	35.25	21.62	6	Yes	R
173026		Industrial Engineering Technologists and Technicians	N/A	N/A	N/A	N/A	0.49	225	27.82	19.05	5	Yes	E
172112	HSHW	Industrial Engineers	1.82	13	59.26	32.52	0.72	853	54.82	34.84	6	Yes	S
499041		Industrial Machinery Mechanics	1.00	42	29.11	20.60	0.27	1,380	30.19	21.69	4	Yes	R
113051	HSHW	Industrial Production Managers	0.25	14	51.83	33.51	0.32	571	59.10	34.24	6	Yes	E
537051		Industrial Truck and Tractor Operators	0.03	135	20.50	16.83	N/A	N/A	N/A	N/A	1	Yes	O
151212	HSHW	Information Security Analysts	3.63	16	55.75	34.07	1.41	888	56.49	36.39	6	Yes	S
519061		Inspectors, Testers, Sorters, Samplers, and Weighers	0.45	57	24.44	16.93	0.55	2,410	24.00	16.65	4	Yes	R
131032	HSHW	Insurance Appraisers, Auto Damage	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	4	Yes	E
413021	HSHW	Insurance Sales Agents	1.28	97	37.06	19.50	0.83	5,254	38.60	19.70	4	Yes	R
132053	HSHW	Insurance Underwriters	0.25	4	42.64	27.07	0.85	557	43.13	27.16	6	Yes	S
271025		Interior Designers	1.54	20	31.54	17.32	0.89	813	31.36	18.27	6	Yes	S

2025-2026 Local Targeted Occupations List

Sorted by Occupational Title

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

Selection Criteria:

- 1LMEC Educational Requirements: 3 (Some College, No Degree), 4 (Postsecondary Non-Degree Award), 5 (Associate Degree), or 6 (Bachelor's Degree)
- 230 annual openings and positive growth
- 3Mean Wage of \$18.67/hour and Entry Wage of \$15.18/hour
- 4High Skill/High Wage (HSHW) Occupations:
Mean Wage of \$29.25/hour and Entry Wage of \$18.67/hour

SOC Code* HSHW** Occupation Title*			Regional				Statewide				LMEC	In	Qualifying
			Annual % Growth	Annual Openings	2024 Hourly Wage		Annual % Growth	Annual Openings	2024 Hourly Wage		Training Code	Targeted Industry?	
					Mean	Entry			Mean	Entry			
273091		Interpreters and Translators	1.04	4	28.66	16.71	1.24	437	26.34	16.22	6	Yes	E
252012		Kindergarten Teachers, Except Special Education	0.01	33	24.70	22.13	0.69	1,118	28.89	22.82	6	No	E
171012	HSHW	Landscape Architects	1.05	7	40.11	25.56	1.00	169	46.17	27.76	6	Yes	E
436012		Legal Secretaries and Administrative Assistants	-1.54	14	23.68	17.05	0.78	1,582	27.93	17.55	3	Yes	S
292061	HSHW	Licensed Practical and Licensed Vocational Nurses	0.68	111	29.33	24.96	0.68	3,440	29.00	24.00	4	No	R
194099	HSHW	Life, Physical, and Social Science Technicians, All Other	0.03	8	33.86	18.89	N/A	N/A	N/A	N/A	6	No	O
132072	HSHW	Loan Officers	0.50	24	39.90	19.48	0.23	1,889	39.54	19.63	6	Yes	S
119081		Lodging Managers	0.02	10	32.24	17.26	N/A	N/A	N/A	N/A	6	No	O
131081	HSHW	Logisticians	2.12	13	35.72	21.95	0.84	1,210	36.54	22.98	6	Yes	S
514041		Machinists	1.06	33	27.24	20.22	0.59	878	25.63	18.77	4	Yes	R
292035	HSHW	Magnetic Resonance Imaging Technologists	1.20	6	40.78	34.67	0.44	265	38.27	29.11	5	Yes	E
499071		Maintenance and Repair Workers, General	0.02	278	20.89	15.64	N/A	N/A	N/A	N/A	2	Yes	O
131111	HSHW	Management Analysts	1.15	109	44.20	23.70	0.91	7,131	47.42	26.12	6	Yes	R
119199	HSHW	Managers, All Other	0.84	69	50.62	24.29	0.57	4,150	56.32	26.57	6	No	R
172121	HSHW	Marine Engineers and Naval Architects	N/A	N/A	N/A	N/A	1.10	48	56.43	33.73	6	Yes	E
131161	HSHW	Market Research Analysts and Marketing Specialists	1.74	120	35.20	19.43	0.95	6,289	39.74	22.69	6	Yes	R
112021	HSHW	Marketing Managers	0.78	21	61.28	30.34	0.89	1,539	71.21	37.40	6	Yes	S
319011		Massage Therapists	2.24	51	24.90	15.31	1.02	1,938	24.33	15.64	4	No	R
192032	HSHW	Materials Scientists	0	0	N/A	N/A	N/A	N/A	55.96	36.00	6	No	E
173027	HSHW	Mechanical Engineering Technologists and Technicians	0.78	2	N/A	N/A	0.96	104	31.89	24.31	5	No	E
172141	HSHW	Mechanical Engineers	1.77	12	47.56	30.10	0.68	547	48.98	32.38	6	Yes	N
119111	HSHW	Medical and Health Services Managers	2.47	126	54.32	33.38	0.58	2,902	61.82	33.95	6	No	R
319092		Medical Assistants	1.29	265	20.68	17.28	1.14	9,234	20.66	17.01	4	No	R
499062	HSHW	Medical Equipment Repairers	2.06	12	29.71	19.07	0.49	556	28.82	18.33	5	Yes	N
292072		Medical Records Specialists	0.68	22	21.97	16.39	0.77	1,261	24.19	16.71	4	Yes	S
191042	HSHW	Medical Scientists, Except Epidemiologists	0.21	3	57.79	34.37	0.70	227	60.94	33.11	6	Yes	N
436013		Medical Secretaries and Administrative Assistants	0.66	183	19.93	16.71	0.92	8,918	20.37	16.60	3	No	R
131121		Meeting, Convention, and Event Planners	1.13	22	25.80	16.74	0.66	977	30.12	17.99	6	No	N
211023	HSHW	Mental Health and Substance Abuse Social Workers	1.08	13	26.91	19.74	0.99	477	26.98	19.37	6	No	N
252022		Middle School Teachers, Except Special and Career/Technical Education	1.18	90	28.79	22.46	0.74	2,699	27.99	22.74	6	No	R
514035		Milling and Planing Machine Setters, Operators, and Tenders, Metal and Plastic	0.00	2	22.90	21.43	0.35	138	23.30	18.75	4	Yes	E
493042	HSHW	Mobile Heavy Equipment Mechanics, Except Engines	0.02	35	33.70	26.13	0.34	713	30.87	22.74	4	Yes	E
493051		Motorboat Mechanics and Service Technicians	1.76	34	25.80	19.23	0.96	567	27.05	19.09	4	Yes	R
272042	HSHW	Musicians and Singers	0.60	31	61.91	27.35	0.16	1,226	69.32	25.01	3	No	R
119121	HSHW	Natural Sciences Managers	0.89	7	57.12	32.13	N/A	N/A	N/A	N/A	6	Yes	E
151244	HSHW	Network and Computer Systems Administrators	0.56	19	43.21	29.88	1.19	1,592	46.19	30.48	6	Yes	S
292033	HSHW	Nuclear Medicine Technologists	0.00	4	43.39	30.98	0.45	109	43.81	36.22	5	Yes	E
311131		Nursing Assistant	0.01	475	18.10	16.12	N/A	N/A	N/A	N/A	4	Yes	O
195011	HSHW	Occupational Health and Safety Specialists	N/A	N/A	N/A	N/A	0.73	700	40.11	24.72	6	Yes	S
312011	HSHW	Occupational Therapy Assistants	2.58	22	33.29	28.92	1.42	614	34.07	28.48	5	No	S
439199		Office and Administrative Support Workers, All Other	-0.19	21	22.92	17.03	0.69	3,034	23.25	16.61	3	No	S
472073		Operating Engineers and Other Construction Equipment Operators	0.03	80	24.41	19.16	N/A	N/A	N/A	N/A	2	Yes	O
152031	HSHW	Operations Research Analysts	2.46	6	39.33	22.64	0.81	585	40.59	24.08	6	Yes	S
292057		Ophthalmic Medical Technicians	1.61	18	20.77	16.38	1.43	644	21.49	17.09	4	No	S
472141		Painters, Construction and Maintenance	0.01	70	21.66	17.06	N/A	N/A	N/A	N/A	1	Yes	O
232011		Paralegals and Legal Assistants	1.01	84	27.43	19.16	0.73	4,242	29.40	19.73	5	Yes	R
292043	HSHW	Paramedics	0.00	18	32.00	24.54	N/A	N/A	N/A	N/A	4	Yes	O
433051		Payroll and Timekeeping Clerks	0.32	21	23.67	17.12	0.86	1,210	24.33	16.36	3	Yes	S
132052	HSHW	Personal Financial Advisors	0.98	59	78.57	25.83	0.17	2,004	75.80	25.49	6	No	R
292052		Pharmacy Technicians	1.07	96	20.01	16.86	0.38	3,890	20.58	16.95	4	No	R
319097		Phlebotomists	1.07	39	20.26	17.09	1.11	1,341	19.50	16.80	4	No	R
312021	HSHW	Physical Therapist Assistants	2.76	59	31.62	25.65	1.45	1,293	32.92	26.38	5	No	R
472151		Pipelayers	0.02	9	22.55	18.65	N/A	N/A	N/A	N/A	1	Yes	O
472152		Plumbers, Pipefitters, and Steamfitters	1.45	107	25.21	18.82	0.55	3,007	25.79	19.31	4	No	R
333051	HSHW	Police and Sheriff's Patrol Officers	0.53	77	36.85	28.39	0.28	4,001	40.31	26.70	5	No	R
272012	HSHW	Producers and Directors	1.32	9	40.42	21.47	0.47	737	46.84	24.08	6	Yes	N
435061		Production, Planning, and Expediting Clerks	0.57	60	25.97	18.05	0.64	2,177	26.25	18.20	3	Yes	R
131082	HSHW	Project Management Specialists	0.89	86	46.48	28.01	0.89	5,501	49.64	30.39	6	Yes	R
132020	HSHW	Property Appraisers and Assessors	1.20	11	33.87	20.80	0.73	558	40.25	22.87	6	No	S
119141	HSHW	Property, Real Estate, and Community Association Managers	1.49	77	36.80	21.07	0.85	3,777	38.25	21.42	6	No	R
292053		Psychiatric Technicians	1.30	55	20.36	16.51	1.22	1,151	21.08	16.65	4	No	R
292053		Psychiatric Technicians	1.30	55	20.36	16.51	1.22	1,151	21.08	16.65	4	No	R
273031		Public Relations Specialists	0.88	37	29.71	18.58	0.76	1,999	33.11	19.59	6	Yes	R
113061	HSHW	Purchasing Managers	0.06	5	58.51	34.07	N/A	N/A	N/A	N/A	6	No	O
292034	HSHW	Radiologic Technologists and Technicians	0.31	25	33.31	26.54	0.44	917	34.13	25.82	5	Yes	E
419021		Real Estate Brokers	1.27	16	45.50	19.06	0.76	708	41.45	17.45	4	No	S
419022		Real Estate Sales Agents	1.13	133	39.48	16.17	0.76	7,129	35.25	16.84	4	No	R
291141	HSHW	Registered Nurses	0.23	302	41.64	34.34	0.20	12,683	42.40	33.19	6	No	R
212099		Religious Workers, All Other	0.06	3	N/A	N/A	N/A	N/A	N/A	N/A	6	No	O
291126	HSHW	Respiratory Therapists	0.83	13	37.95	32.29	0.10	499	39.09	30.83	5	No	N
472181		Roofers	0.04	152	22.10	15.90	N/A	N/A	N/A	N/A	1	Yes	O
112022	HSHW	Sales Managers	0.72	41	65.45	31.39	0.72	2,491	70.26	33.97	6	Yes	R

2025-2026 Local Targeted Occupations List
Sorted by Occupational Title

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

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- 2 30 annual openings and positive growth
- 3 Mean Wage of \$18.67/hour and Entry Wage of \$15.18/hour
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Mean Wage of \$29.25/hour and Entry Wage of \$18.67/hour

SOC Code* HSHW**			Regional				Statewide				LMEC	In	
			Annual % Growth	Annual Openings	2024 Hourly Wage		Annual % Growth	Annual Openings	2024 Hourly Wage		Training Code	Targeted Industry?	Qualifying Level***
					Mean	Entry			Mean	Entry			
413091		Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	1.10	204	32.28	17.24	1.11	10,671	34.78	18.33	6	Yes	R
414012		Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	0.99	173	35.65	17.93	0.54	8,691	35.57	18.25	3	Yes	R
414011	HSHW	Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	0.40	47	61.76	27.42	0.81	2,533	61.13	28.44	6	Yes	R
252031		Secondary School Teachers, Except Special and Career/Technical Education	1.16	105	25.75	22.10	0.73	3,621	29.75	22.68	6	No	R
413031	HSHW	Securities, Commodities, and Financial Services Sales Agents	-0.43	54	35.51	21.99	0.43	3,376	43.12	22.09	6	No	S
492098		Security and Fire Alarm Systems Installers	1.38	17	27.40	20.24	0.79	926	27.49	20.81	4	No	S
472211		Sheet Metal Workers	0.02	43	24.10	18.21	N/A	N/A	N/A	N/A	2	Yes	O
535031	HSHW	Ship Engineers	N/A	N/A	N/A	N/A	-0.09	125	51.31	32.09	4	Yes	E
435071		Shipping, Receiving, and Traffic/Inventory Clerks	0.01	105	19.88	14.73	N/A	N/A	N/A	N/A	2	Yes	O
119151	HSHW	Social and Community Service Managers	0.78	26	35.32	22.25	0.63	732	37.76	22.93	6	No	N
211093		Social and Human Service Assistants	0.77	76	19.96	15.52	0.64	2,332	21.36	16.14	3	No	R
194061	HSHW	Social Science Research Assistants	N/A	N/A	N/A	N/A	0.77	105	31.01	20.32	6	Yes	E
211029		Social Workers, All Other	0.00	12	25.11	20.47	N/A	N/A	N/A	N/A	6	No	O
151252	HSHW	Software Developers	2.78	57	61.79	37.79	1.67	5,834	61.68	38.59	6	Yes	R
151253	HSHW	Software Quality Assurance Analysts and Testers	2.75	8	48.87	30.95	1.88	1,025	47.69	31.59	6	Yes	S
252052		Special Education Teachers, Kindergarten and Elementary School	1.02	9	25.36	21.83	0.71	549	28.36	23.57	6	No	S
252058	HSHW	Special Education Teachers, Secondary School	1.15	19	31.22	23.23	0.71	678	30.39	23.07	6	No	S
271014	HSHW	Special Effects Artists and Animators	N/A	N/A	N/A	N/A	0.92	406	39.49	27.25	6	No	N
152041		Statisticians	N/A	1	N/A	N/A	N/A	N/A	N/A	N/A	5	No	O
537065		Stockers and Order Fillers	0.03	1,189	17.05	14.33	N/A	N/A	N/A	N/A	2	Yes	O
472221		Structural Iron and Steel Workers	0.04	7	23.54	18.36	N/A	N/A	N/A	N/A	2	Yes	O
211018		Substance Abuse, Behavioral Disorder, and Mental Health Counselors	1.88	67	28.48	20.60	1.35	1,877	29.08	20.09	6	No	R
299093		Surgical Assistants	0.38	4	28.22	22.10	0.61	146	29.73	21.64	4	Yes	E
292055		Surgical Technologists	0.00	14	29.33	21.93	0.29	625	28.77	20.39	4	Yes	E
173031		Surveying and Mapping Technicians	1.15	24	23.98	17.80	0.94	740	24.53	18.00	5	Yes	S
171022	HSHW	Surveyors	1.08	9	34.09	22.67	1.04	285	33.03	21.93	6	Yes	E
253099		Teachers and Instructors, All Other	0.69	26	25.49	14.70	N/A	N/A	29.31	16.44	6	No	N
512092		Team Assemblers	N/A	N/A	N/A	N/A	0.02	5,450	18.01	13.66	2	Yes	O
273042	HSHW	Technical Writers	0.00	3	43.25	30.29	1.16	278	41.88	28.24	6	No	E
492022	HSHW	Telecommunications Equipment Installers and Repairers, Except Line Installers	2.31	51	34.36	24.90	1.13	1,612	31.50	22.84	4	No	R
499052		Telecommunications Line Installers and Repairers	2.01	13	24.10	16.78	1.03	822	27.48	18.96	4	No	S
291129	HSHW	Therapists, All Other	2.08	4	N/A	N/A	0.49	104	31.23	19.85	6	Yes	E
472044		Tile and Stone Setters	0.03	19	23.76	16.08	N/A	N/A	N/A	N/A	1	Yes	O
514111	HSHW	Tool and Die Makers	0.35	4	31.92	24.42	0.39	76	30.71	22.55	4	Yes	E
131151		Training and Development Specialists	0.79	51	32.44	17.30	0.83	2,547	34.92	18.93	6	Yes	R
113071	HSHW	Transportation, Storage, and Distribution Managers	1.08	13	43.87	23.81	0.59	857	50.12	27.10	6	Yes	N
413041		Travel Agents	0.49	10	23.67	16.20	0.85	1,703	23.90	16.73	3	No	S
319096		Veterinary Assistants and Laboratory Animal Caretakers	0.03	56	17.59	14.50	N/A	N/A	N/A	N/A	2	No	O
292056		Veterinary Technologists and Technicians	2.94	45	20.46	16.35	2.05	1,285	20.79	16.58	5	Yes	R
151255	HSHW	Web and Digital Interface Designers	1.65	5	35.04	13.32	1.19	498	41.22	22.39	5	Yes	N
151254	HSHW	Web Developers	2.06	9	37.40	22.33	1.49	452	43.39	24.13	5	Yes	N
514121		Welders, Cutters, Solderers, and Brazers	0.75	54	24.52	19.10	0.47	1,655	25.27	19.55	4	Yes	R
514122		Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders	-0.89	1	N/A	N/A	0.43	56	20.35	17.89	4	Yes	E
273043	HSHW	Writers and Authors	0.00	3	40.41	21.73	N/A	N/A	N/A	N/A	6	No	O

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

**HSHW = High Skill/High Wage.

***Qualifying Level:

- R = Meets regional wage and openings criteria based on state Labor Market Statistics employer survey data.
- S = Meets statewide wage and openings criteria based on state Labor Market Statistics employer survey data.
- N = Meets national wage and openings criteria based on national Labor Market Statistics employer survey data.
- E = Meets emerging wage and openings criteria based on state Labor Market Statistics employer survey data
- O = Other criteria including, but not limited to (entry to targeted career pathway, other local initiatives, etc.)

N/A = Not available/releasable.

LMEC = Labor Market Estimating Conference

1 (No formal educational requirement) 2 (HS Diploma or Equivalent) 3 (Some College, No Degree), 4 (Postsecondary Non-Degree Award), 5 (Associate Degree), or 6 (Bachelor's Degree), or 7 (Master's Degree)

AGENDA ITEM SUMMARY

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

Board Member's Name: _____

Board Member's Title: _____

Board Member's Organization: _____

Board Seat (select all that apply):

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

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

Name of Designee: _____

Title of Designee: _____

Mailing Address of Designee: _____

Designee Telephone Number: _____ Fax Number: _____

Designee Email: _____

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

Board Member Signature:  _____ Date: 8/26/2025

Designee Signature:  _____ Date: 8/26/2025

AGENDA ITEM SUMMARY

Title	Executive Committee's Recommendation for Executive Staff Salary Compensation
Strategic Plans/Goals	Administration & Strategic
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's/DEO Grantee- Subgrantee Agreement
Action Requested	Review and Approve the Executive Committee's Recommendation for Executive Staff Salary Compensation
Background	<p>In accordance with the DEO Grantee/Sub-Grantee Agreement requirements, any modifications to executive staff compensation must receive documented Board approval and comply with local policies and procedures. The Board must verify that these adjustments represent reasonable and necessary investments in successful award performance and demonstrate prudent use of federal funding.</p> <p>The Executive Committee made the following recommendation for Executive Staff Salary Compensation:</p> <ul style="list-style-type: none">• Brian Bauer - Annual salary adjustment to \$147,000• Tracey McMorris - Annual salary adjustment to \$107,500• Lisa Delligatti - Annual salary adjustment to \$107,500
Staff Recommendations	Review and Approve the Executive Committee's Recommendation for Executive Staff Salary Compensation
Supporting Material	Letter of Recommendation from Board Chair
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418



careersourcerc.com

September 12, 2025

To Whom It May Concern:

In accordance with the DEO Grantee/Sub-Grantee Agreement requirements, I am writing to document Board approval for executive staff compensation changes at CareerSource Research Coast (CSRC).

As stipulated in our agreement, any modifications to executive staff compensation must receive documented Board approval and comply with local policies and procedures. The Board has verified that these adjustments represent reasonable and necessary investments in successful award performance and demonstrate prudent use of federal funding.

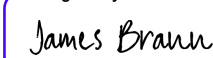
Executive Committee Action: The CareerSource Research Coast Executive Committee has reviewed and approved the following executive staff salary compensation:

- Brian Bauer - Annual salary adjustment to \$147,000
- Tracey McMorris - Annual salary adjustment to \$107,500
- Lisa Delligatti - Annual salary adjustment to \$107,500

These adjustments were evaluated against performance metrics, market standards, and fiscal responsibility requirements to ensure alignment with federal funding guidelines.

Sincerely,

Signed by:

A handwritten signature in black ink that reads "James Brann".

James Brann

Board Chair

CareerSource Research Coast

Administrative Offices
4100 Okeechobee Road, Fort Pierce, Florida 34947
Unit 90A
info@careersourcerc.com
p: 866.482.4473 | f: 866.314.6580

Agenda Item 11

AGENDA ITEM SUMMARY

Title	LWDB 20 Primary Indicators of Performance for Program Year (PY) 2024-2025 4th Quarter
Strategic Plans/Goals	Clear, Credible, and Trustworthy Commitments and Projects
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA) Title I Programs and Title III Wagner-Peyser (WP) Act; Training and Employment Guidance Letter No. 09-20
Action Requested	None - Information Only
Background	<p>The State of Florida must negotiate and agree upon performance levels for WIOA and WP programs funded by the United States Department of Labor, Employment and Training Administration. Once the state levels are established, the Department of Commerce (FLORIDACOMMERCE) must negotiate and reach agreements with the Local Workforce Development Boards regarding their local performance targets.</p> <p>Staff will review CareerSource Research Coast's performance for the 4th quarter of PY2024- 2025.</p>
Staff Recommendations	None - Information Only
Supporting Material	LWDB 20 PY2024-2025 4th Quarter Performance
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 518

LWDB 20

Measures	PY2023-2024 4th Quarter Performance	PY2023-2024 % of Performance Goal Met For Q4	PY2023-2024 Performance Goals	PY2024-2025 1st Quarter Performance	PY2024-2025 % of Performance Goal Met For Q1	PY2024-2025 2nd Quarter Performance	PY2024-2025 % of Performance Goal Met For Q2	PY2024-2025 3rd Quarter Performance	PY2024-2025 % of Performance Goal Met For Q3	PY2024-2025 4th Quarter Performance	PY2024-2025 % of Performance Goal Met For Q4	PY2024-2025 Performance Goals
Adults:												
Employed 2nd Qtr After Exit	94.70	103.38	91.60	97.6	104.61	97.1	104.07	94.6	101.39	93	99.68	93.3
Median Wage 2nd Quarter After Exit	\$13,000	141.26	\$9,203	\$13,586	137.43	\$14,129	142.92	\$14,963	151.35	\$14,341	145.06	\$9,886
Employed 4th Qtr After Exit	93.80	102.96	91.10	92.6	101.65	93.3	102.41	94	103.18	92.2	101.21	91.1
Credential Attainment Rate	94.30	107.16	88.00	95.5	111.44	94.1	109.80	92.5	107.93	89.4	104.32	85.7
Measurable Skill Gains	99.30	116.41	85.30	77.3	108.57	89.9	126.26	86.9	122.05	99.3	139.47	71.2
Dislocated Workers:												
Employed 2nd Qtr After Exit	100.00	113.64	88.00	100	108.70	100	108.70	88.9	96.63	88.9	96.63	92
Median Wage 2nd Quarter After Exit	\$9,749	112.86	\$8,638	\$11,382.50	113.83	\$9,946	99.46	\$10,113	101.13	\$9,661	96.61	\$10,000
Employed 4th Qtr After Exit	90.90	98.27	92.50	100	109.89	100	109.89	100	109.89	100	109.89	91
Credential Attainment Rate	100.00	132.63	75.40	100	112.11	100	112.11	100	112.11	100	112.11	89.2
Measurable Skill Gains	100.00	129.37	77.30	90.9	113.77	88.9	111.26	75	93.87	100	125.16	79.9
Youth:												
Employed 2nd Qtr After Exit	87.30	107.51	81.20	90	111.66	90.5	112.28	91.2	113.15	87	107.94	80.6
Median Wage 2nd Quarter After Exit	\$4,830	148.11	\$3,261	\$4,523.50	129.24	\$4,802	137.20	\$4,909	140.26	\$4,565	130.41	\$3,500
Employed 4th Qtr After Exit	85.70	108.76	78.80	90.5	123.97	90.9	124.52	93.3	127.81	93.7	128.36	73
Credential Attainment Rate	79.50	90.14	88.20	81.3	92.18	87.2	98.87	88.4	100.23	88.4	100.23	88.2
Measurable Skill Gains	98.80	121.98	81.00	90.1	104.40	90.2	104.52	96.3	111.59	98.6	114.25	86.3
Wagner Peyser:												
Employed 2nd Qtr After Exit	63.60	97.40	65.30	64.9	97.89	65.5	98.79	65	98.04	64.2	96.83	66.3
Median Wage 2nd Quarter After Exit	\$7,426	134.04	\$5,540	\$7,535	136.01	\$7,716	122.57	\$7,862	124.89	\$7,800	123.91	\$6,295
Employed 4th Qtr After Exit	62.50	99.84	62.60	63	100.64	62.5	100.64	63.8	102.74	64	103.06	62.1

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

AGENDA ITEM SUMMARY

Title	Department of Commerce (FLORIDACOMMERCE) Financial and Programmatic Compliance Monitoring Review - PY 2024-2025
Strategic Plans/Goals	Effective Utilization of Current and Timely Operational Intelligence for all Stakeholders
Policy/Plan/Law	Grantee/Sub-Grantee Agreement, CSRC Administrative Plan
Action Requested	None - Information Only
Background	The Department of Commerce (FLORIDACOMMERCE) Financial and Programmatic Compliance Monitoring Review for PY 2024-2025 will focus on the LWDB's compliance with State and federal expenditure requirements, programmatic and fiscal monitoring results, and WIOA performance results.
Staff Recommendations	None - Informational Only
Supporting Material	The Department of Commerce (FLORIDACOMMERCE) Financial and Programmatic Compliance Monitoring Review for PY 2024-2025 Link: : https://careersourcerc.com/wp-content/uploads/2025/09/FloridaCommerce-Financial-and-Programmatic-Monitoring-Report-Program-Year-2024-2025.pdf
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

Agenda Item 13

AGENDA ITEM SUMMARY

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

Agenda Item 14

AGENDA ITEM SUMMARY

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

Agenda Item 15

AGENDA ITEM SUMMARY

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

Agenda Item 16

AGENDA ITEM SUMMARY

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