



# Executive Committee

## MEETING AGENDA

### *Meeting Details*

**Date:** Friday, January 16, 2026

**Time:** 8:00 am

**Location:** 4100 Okeechobee Road,  
Fort Pierce, Florida 34947  
Unit 90A

### *MS Teams Virtual Meeting Access:*

**Access Code:** 352 587 236#

**Phone:** 772-800-5467

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

### *Opening Remarks*

1. Welcome & Attendance
2. Conflict of Interest Declaration

### *Voting Items*

3. Consent Agenda
  - a. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Adult and Dislocated Worker Program Eligibility Policy
  - b. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Adult and Dislocated Worker Program Supportive Services Policy Revisions
  - c. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Individual Training Account Policy Revisions
  - d. Review and Approve Supplemental Nutrition Assistance Program (SNAP) - Employment and Training Program Components and Case Management Policy
  - e. Review and Approve Executive Meeting Minutes:
    - I. October 17, 2025
    - II. November 14, 2025
4. Review and Approve October and November Financial Reports - PY 2025-2026
5. Review and Approve Acceptance of the Final Financial Statements Audit - June 30, 2025, and 2024
6. Review and Approve Local Targeted Occupations List (LTOL) for 3rd Quarter - PY2025-2026
7. Review and Approve President/CEO Annual Performance Evaluation
8. Review and Approve Executive Staff Cost of Living Increase



### *Information/Discussion*

9. Primary Indicators of Performance - 1<sup>st</sup> Quarter - PY 2025-2026
10. Letter Grade - Performance Update 2nd Quarter - PY 2024-2025
11. CareerSource Research Coast (CSRC) Updates
  - Organizational Updates
  - CSFL Board/Council/FWDA Meetings - Workforce Day at the Capitol - January 26-28, 2026
  - Workforce Readiness Taskforce/Education and Industry Consortium Update
  - Rescheduled Board of Directors Meeting - February 4, 2026
12. Adjournment - Next Committee Meeting - February 13, 2026



# Agenda Item 2

## AGENDA ITEM SUMMARY

<b>Title</b>	Declarations of Conflict of Interest
<b>Strategic</b>	N/A
<b>Plans/Goals</b>	Public Law 105-220
<b>Policy/Plan/Law</b>	Information Only
<b>Background/Action Requested</b>	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
<b>Staff Recommendations</b>	Conflict of Interest Statement Form
<b>Supporting Material</b>	8B Memorandum of Voting Conflict
<b>Board Staff</b>	Brian Bauer President/CEO <a href="mailto:bbauer@careersourcerc.com">bbauer@careersourcerc.com</a> (866) 482-4473 ext. 418

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# 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

<b>Title</b>	Consent Agenda
<b>Strategic Plans/Goals</b>	Operational Intelligence
<b>Policy/Plan/Law</b>	Board By-Laws
<b>Action Requested</b>	Approve Consent Agenda as presented
<b>Background</b>	<p>Consent Agenda</p> <ul style="list-style-type: none"> <li>a. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Adult and Dislocated Worker Program Eligibility Policy</li> <li>b. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Adult and Dislocated Worker Program Supportive Services Policy Revisions</li> <li>c. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Individual Training Account Policy Revisions</li> <li>d. Review and Approve Supplemental Nutrition Assistance Program (SNAP) - Employment and Training Program Components and Case Management Policy</li> <li>e. Review and Approve Executive Meeting Minutes: October 17, 2025 November 14, 2025</li> </ul>
<b>Staff Recommendation</b>	Review and Approve Consent Agenda Items as presented
<b>Supporting Material</b>	Draft Policies
<b>Board Staff</b>	<p>Brian Bauer President/CEO <a href="mailto:bbauer@careersourcerc.com">bbauer@careersourcerc.com</a> (866) 482-4473 ext. 418</p>

## AGENDA ITEM SUMMARY

<b>Title</b>	Review and Approve the Workforce Innovation and Opportunity Act (WIOA) - Adult and Dislocated Worker Program Eligibility Policy
<b>Strategic Plans/Goals</b>	Operational Intelligence
<b>Policy/Plan/Law</b>	CareerSource Florida (CSFL) Administrative Policy P122; Workforce Innovation and Opportunity Act of 2014, Public Law 113-128; Code of Federal Regulations (CFR), Title 20 Part 680; TEGL No. 11-11, Change 2; TEGL No. 19-16; TEGL 07-20.
<b>Action Requested</b>	Review and Approve the WIOA - Adult and Dislocated Worker Program Eligibility Policy
<b>Background</b>	<p>The purpose of this policy is to provide the Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker program eligibility requirements to CareerSource Research Coast (CSRC) staff to ensure timely, efficient, and aligned services are provided to all seeking eligibility in this program.</p> <p>CareerSource Florida updated Administrative Policy P122-Adult and Dislocated Worker Program Eligibility, which went into effect on 8/21/2025. Therefore, CSRC revised our local policy accordingly. Revisions included updates reflecting federal guidance on requirements for verifying work authorization and selective service verification, providing guidance on the retention of eligibility proof in Employ Florida, and providing an attachment/resource that includes includable/excludable sources of income, as well as examples of methods for calculating income.</p>
<b>Supporting Material</b>	WIOA - Adult and Dislocated Worker Program Eligibility Policy
<b>Board Staff</b>	Tracey McMorris Vice President of Operations/COO <a href="mailto:tmcmorris@careersourcerc.com">tmcmorris@careersourcerc.com</a> 1-866-482-4473 ext. 528



## I. PURPOSE AND SCOPE

The purpose of this policy is to provide the Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker program eligibility requirements to CareerSource Research Coast (CSRC) staff to ensure timely, efficient, and aligned services are provided to all seeking eligibility in this program.

## II. REFERENCES

[CareerSource Florida \(CSFL\) Administrative Policy P122](#); Workforce Innovation and Opportunity Act of 2014, [Public Law 113-128](#); Code of Federal Regulations (CFR), [Title 20 Part 680](#); [TEGL No. 11-11, Change 2](#); [TEGL No. 19-16](#); [TEGL 07-20](#).

## III. LOCAL POLICY

### A. **Eligibility for Career Services**

WIOA section (sec.) 3(2) defines an individual who is considered an adult and WIOA sec. 3(15) defines an individual who is considered a dislocated worker for eligibility purposes to participate in the WIOA Adult or Dislocated Worker programs. CSRC must ensure that every individual receiving services under the WIOA Adult or Dislocated Worker programs meets the applicable eligibility criteria and is subsequently enrolled in the program.

An individual's eligibility status is fixed at the time of eligibility determination, and individuals remain eligible for the Adult/Dislocated Worker Program even if there are changes in the original circumstances that were used as the basis to establish eligibility. For example, an individual determined eligible as a dislocated worker on the basis of an anticipated layoff or termination remains eligible even if the layoff or termination does not take place.

Pursuant to the definition of dislocated worker, RESEA participants and those in stop-gap employment may also be eligible for services through the WIOA Dislocated Worker Program.

### B. **Eligibility for Training Services**

Training services may be made available to employed and unemployed adults and dislocated workers consistent with federal regulations ([20 CFR 680.220](#), [20 CFR 680.210\(2\)](#), [20 CFR 680.210\(3\)](#), [20 CFR 680.210\(b\)](#)). Additional considerations include:

- i. Economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services serve as part of the determination consistent with local plans;
- ii. Individuals 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 who require WIOA assistance in addition to other sources of grant assistance, including Federal Pell Grants may be eligible. Veteran Assistance (VA) benefits for education and training services do not constitute "other grant assistance" under WIOA's eligibility requirements and do not preclude eligibility or need to be exhausted or depleted for eligibility to be determined ([20 CFR 680.210\(c\)](#), [20 CFR 680.230](#)); and
- iii. Need financial support to cover training costs that have not been paid. Reimbursement for training services already paid for is not allowed.





- iv. If training services are provided through the adult funding stream, are determined eligible in accordance with the state and local priority system in effect for adults, as prescribed in [Workforce Policy 105 – Priority of Service \(20 CFR 680.210\(d\)\)](#).

### C. Statutory Priority for Adult Funds

WIOA establishes a priority requirement with respect to funds allocated to a local area for the Adult program ([WIOA sec. 134\(c\)\(3\)\(E\)](#)). When using WIOA Adult funds to provide individualized career services and training services, CSRC must give priority to recipients of public assistance consistent with [Workforce Policy 105 – Priority of Service](#) and [Workforce Policy P111 – Priority of Service for Veterans and Eligible Spouses](#) for the requirements for providing priority of service under WIOA.

### D. Eligibility Documentation

Career Planners are required to collect supporting eligibility documentation used to determine eligibility and retain such documentation in Employ Florida. Career Planners must ensure the documentation collected is appropriate and available for review by auditors and federal, state, and local representatives. Career Planners must obtain and maintain documentation that supports the determination for eligibility and continuous participation. Please see Section IV. Resources/Attachments: [Source Documentation for Core/Non- Core Programs DOL-only Data Element Validation](#).

### E. Enrollment

#### 1. Employ Florida Requirements

Individuals seeking WIOA services, aside from self-service or information-only services or activities, through the Adult and Dislocated Worker program must be registered in Employ Florida ([20 CFR 680.110\(b\)](#)). Once an individual is determined to be eligible for the WIOA Adult or Dislocated Worker program, Career Planners are required to complete a WIOA Adult or Dislocated Worker program application in Employ Florida and enter all required information, including that required by [29 CFR 38.41\(b\)](#).

#### 2. Enrollment Process Requirements

Individuals interested in consideration for WIOA Title I Adult or Dislocated Worker program services must be allowed to apply for services. However, an application alone is not equivalent to enrollment into the program. Career Planners must ensure that every individual receiving services under this program is determined eligible as an adult or dislocated worker and formally enrolled in the program as soon as possible but no later than 90 days after eligibility determination. When enrollment is not completed within 90 days of eligibility determination, a redetermination must occur. Enrollment into the program(s) requires assigning an appropriate service in Employ Florida that initiates participation ([Employ Florida Service Code Guide](#)). Note that while CSRC must meet the 90 days requirement above, CSRC should strive to ensure that every individual seeking to receive services under the Dislocated Worker program is determined eligible as a dislocated worker and formally enrolled in the program no later than 30 days after eligibility determination.



### **3. Enrollment in the Adult Program, the Youth Program, or Both**

Individuals between the ages of 18 to 24 who meet the respective program eligibility requirements may participate in either the WIOA Adult or Youth program or participate in both concurrently. Such individuals must meet the youth or adult eligibility criteria applicable to the services provided. If such concurrent enrollment occurs, CSRC must track expenditures separately by program and the delineation of services must be clearly identified in the service plan for activities in Employ Florida.

See [Workforce Policy 095 - Youth Eligibility](#), as well as CSRC's [WIOA - Adult and DW Program Framework and Design Procedures](#) for specific details about co-enrollment.

### **4. Timely, Efficient, and Aligned Determinations**

CSRC must engage all customers by following the standards established in [CareerSource Florida Workforce Policy P9 - Availability of Services to Floridians](#). For job seekers, CSRC prioritizes customer-centered approaches that ensure a smooth transition from self-service to staff-assisted support, guiding individuals through intake, eligibility assessment, service delivery, and ultimately into quality employment. Additionally, customer eligibility determination should allow for the provision of services and support as quickly as possible, and CSRC staff should deliver services efficiently with a high level of communication and opportunity for feedback.

## **IV. RESOURCES/ATTACHMENTS**

[Source Documentation for Core/Non-Core Programs DOL-only Data Element Validation](#)

[Implementing Priority of Service Provisions for Most in Need Individuals in the WIOA Adult Program](#)

[WIOA Desk Reference-Priority of Service for WIOA Adult Funds](#)

[Promising Practices in Achieving Universal Access and Equal Opportunity: A Section 188 Disability Reference Guide](#)

[Selective Service - Who Must Register](#)

[Includable/Excludable Income](#)

## AGENDA ITEM SUMMARY

<b>Title</b>	Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Supportive Services Policy Revisions
<b>Strategic Plans/Goals</b>	Operational Intelligence
<b>Policy/Plan/Law</b>	Workforce Innovation and Opportunity Act, Public Law (WIOA) Sections 3(59); 134(c)(2). 134(c)(3) Employment and Training Administration, United States Department of Labor. TEGL 19-16. 20 Code of Federal Regulations (CFR) Subpart G; 680.970; 680.900. CareerSource Florida Administrative Policy 109
<b>Action Requested</b>	Review and Approve Revisions to the Workforce Innovation and Opportunity Act (WIOA) - Supportive Services Policy
<b>Background</b>	<p>WIOA requires access to supportive services that participants may need to overcome barriers that affect their abilities to successfully participate in and/or to complete training activities. CSRC shall authorize payment for supportive services when a participant demonstrates financial need, when the participant will not be successful without the support, and when no alternative funding is available to pay for the supportive service(s).</p> <p>Staff revised CSRC's WIOA A/DW Supportive Services Policy to include the new local review/approval process via the Requests for Training/Support/Incentives Smartshee</p>
<b>Staff Recommendations</b>	Review and Approve Revisions to the Workforce Innovation and Opportunity Act (WIOA) - Supportive Services Policy
<b>Supporting Material</b>	Workforce Innovation and Opportunity Act (WIOA) - Supportive Services Policy Revisions
<b>Board Staff</b>	<p>Tracey McMorris Vice President of Operations/COO <a href="mailto:tmcmorris@careersourcerc.com">tmcmorris@careersourcerc.com</a> 1-866-482-4473 ext. 528</p>

## PURPOSE

To establish a uniform standard for providing supportive services to Workforce Innovation & Opportunity Act (WIOA) Adult and Dislocated Worker (A/DW) program participants of CareerSource Research Coast (CSRC). To avoid duplication, CSRC shall coordinate/provide cost-effective support services by connecting participants to other resources, or via the use of WIOA funds as available.

## REFERENCES

Workforce Innovation and Opportunity Act, Public Law (WIOA) Sections 3(59); 134(c)(2). 134(c)(3) Employment and Training Administration, United States Department of Labor. TEGL 19-16. 20 Code of Federal Regulations (CFR) Subpart G; 680.970; 680.900. CareerSource Florida Administrative Policy 109.

## BACKGROUND

While participating in WIOA career or training services, the WIOA participant may need supportive services to overcome barriers that affect their ability to successfully participate in and/or complete training activities. CSRC shall authorize payment for supportive services when a participant demonstrates financial need, when the participant will not be successful without the support, and when no alternative funding is available to pay for the supportive service(s). Supportive services include but are not limited to the following.

- WIOA ~~F~~funded ~~S~~supportive ~~S~~services
  - Tools/Uniforms/Shoes
  - Books
  - Educational and Testing Fees/Licensing and Credentialing Fees/Background Screening
  - Childcare/Dependent Care Assistance
  - Needs-Related Payments
  - Healthcare
  - Transportation Supportive Services
    - Gas/Prepaid Cards/Bus Passes
    - Uber Gift Cards
    - Driver's License, Permit, State ID
    - Vehicle Insurance
    - Vehicle Registration
    - Vehicle Repair
- Non-WIOA ~~F~~funded ~~S~~supportive ~~S~~services
  - Linkages to Community Services
  - Referrals to Assistance with Housing
  - Referrals to Legal Aid Services
  - Referrals to Reasonable Accommodations for Individuals with Disabilities

## LOCAL POLICY

WIOA funded supportive services are requested ~~and- reviewed for approval~~approved via the Requests for Training/Support/Incentives Smartsheet form ~~at the Career Planner's discretion, with approval from the Center Manager and Program Coordinator~~. The participant's barrier for which the supportive service intends to overcome must be documented in the Individual Employment Plan (IEP). The participant must complete and sign a WIOA Support Services Statement of Need Form ~~Statement of Need Form~~ detailing their financial need for support and the cost of the requested supportive service. A copy of the form must be ~~maintained in the participant's case~~.

~~file~~uploaded to [Employ Florida \(EF\)](#). Staff must record the appropriate code in ~~Employ Florida (EF)~~, along with a supporting case note documenting the need for the supportive service, as reflected in the IEP. If the supportive service is available through other sources, staff must also document how/why referrals to other agencies would create a hardship for the participant.

A specific monetary cap will not limit WIOA supportive services. Instead, limits will be based on the participant's documented need, suitability, and funding availability. The table below reflects the supportive services regularly needed by WIOA A/DW participants. [Requests for support services not listed may be submitted via the Requests for Training/Support/Incentives Smartsheet](#); however, the ~~CEO/President~~VP/COO will have the final say on approval of supportive services not listed, as well as for any requests that exceed the "Quantity Limitation," or maximum amount listed below. ~~Requests for support services not listed may be submitted to the Program Coordinator, or designee, and Career Center Manager for review with the Director of Programs/COO/Vice-President of Operations. The CEO/President will have the final say on approval of supportive services not listed, as well as for any requests that exceed the "Quantity Limitation," or maximum amount listed below.~~

SUPPORT SERVICE LIMITATIONS PER PROGRAM YEAR	
Support Service	Quantity Limitation
Background Screening	Once Per Program Year
Tools	Once Per Program Year
Bus Passes	Once Per Month Maximum
Childcare/Dependent Care	\$1,000 Maximum Per Program Year
Driver's License, Permit, State ID	Once Per Program Year
Books	Once Per Semester
Testing, Licensing, and Credentialing Fees	Once Per Program Year
Educational Fees	Once Per Semester
Gas/Prepaid Cards	Bi-weekly
Health Care (medical or counseling), Physicals/Drug Screening, etc.	\$500 Maximum Per Program Year
Shoes	One Pair Per Program Year
Uber Gift Cards	Bi-weekly
Uniforms	2 Tops and 2 Bottoms Per Program Year (**unless participant provides documentation from the training program/potential employer with the # of uniform items required)
Vehicle Insurance	Once Per Program Year
Vehicle Registration	Once Per Program Year
Vehicle Repair	Once Per Lifetime



**REFER TO THE FOLLOWING DOCUMENTS**

WIOA - Support Services Procedures

WIOA - Needs Related Payment Procedures



**PURPOSE**

To establish a uniform standard for providing supportive services to Workforce Innovation & Opportunity Act (WIOA) Adult and Dislocated Worker (A/DW) program participants of CareerSource Research Coast (CSRC). To avoid duplication, CSRC shall coordinate/provide cost-effective support services by connecting participants to other resources, or via the use of WIOA funds as available.

**REFERENCES**

Workforce Innovation and Opportunity Act, Public Law (WIOA) Sections 3(59); 134(c)(2). 134(c)(3) Employment and Training Administration, United States Department of Labor. TEGL 19-16. 20 Code of Federal Regulations (CFR) Subpart G; 680.970; 680.900. CareerSource Florida Administrative Policy 109.

**BACKGROUND**

While participating in WIOA career or training services, the WIOA participant may need supportive services to overcome barriers that affect their ability to successfully participate in and/or complete training activities. CSRC shall authorize payment for supportive services when a participant demonstrates financial need, when the participant will not be successful without the support, and when no alternative funding is available to pay for the supportive service(s). Supportive services include but are not limited to the following.

- WIOA Funded Supportive Services
  - Tools/Uniforms/Shoes
  - Books
  - Educational and Testing Fees/Licensing and Credentialing Fees/Background Screening
  - Childcare/Dependent Care Assistance
  - Needs-Related Payments
  - Healthcare
  - Transportation Supportive Services
    - Gas/Prepaid Cards/Bus Passes
    - Uber Gift Cards
    - Driver's License, Permit, State ID
    - Vehicle Insurance
    - Vehicle Registration
    - Vehicle Repair
- Non-WIOA Funded Supportive Services
  - Linkages to Community Services
  - Referrals to Assistance with Housing
  - Referrals to Legal Aid Services
  - Referrals to Reasonable Accommodations for Individuals with Disabilities

**LOCAL POLICY**

WIOA funded supportive services are requested and reviewed for approval via the Requests for Training/Support/Incentives Smartsheet form. The participant's barrier for which the supportive service intends to overcome must be documented in the Individual Employment Plan (IEP). The participant must complete and sign a [WIOA Support Services Statement of Need Form](#) detailing their financial need for support and the cost of the requested supportive service. A copy of the form must be uploaded to Employ Florida (EF). Staff must record the appropriate code in EF, along with a supporting case note documenting the need for the supportive service, as reflected in the IEP. If the supportive service is available through other sources, staff must also document how/why referrals to other agencies would create a hardship for the participant.

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

A specific monetary cap will not limit WIOA supportive services. Instead, limits will be based on the participant's documented need, suitability, and funding availability. The table below reflects the supportive services regularly needed by WIOA A/DW participants. Requests for support services not listed may be submitted via the Requests for Training/Support/Incentives Smartsheet; however, the VP/COO will have the final say on approval of supportive services not listed, as well as for any requests that exceed the "Quantity Limitation," or maximum amount listed below.

<b>SUPPORT SERVICE LIMITATIONS PER PROGRAM YEAR</b>	
<b>Support Service</b>	<b>Quantity Limitation</b>
Background Screening	Once Per Program Year
Tools	Once Per Program Year
Bus Passes	Once Per Month Maximum
Childcare/Dependent Care	\$1,000 Maximum Per Program Year
Driver's License, Permit, State ID	Once Per Program Year
Books	Once Per Semester
Testing, Licensing, and Credentialing Fees	Once Per Program Year
Educational Fees	Once Per Semester
Gas/Prepaid Cards	Bi-weekly
Health Care (medical or counseling), Physicals/Drug Screening, etc.	\$500 Maximum Per Program Year
Shoes	One Pair Per Program Year
Uber Gift Cards	Bi-weekly
Uniforms	2 Tops and 2 Bottoms Per Program Year (**unless participant provides documentation from the training program/potential employer with the # of uniform items required)
Vehicle Insurance	Once Per Program Year
Vehicle Registration	Once Per Program Year
Vehicle Repair	Once Per Lifetime

#### **REFER TO THE FOLLOWING DOCUMENTS**

WIOA - Support Services Procedures

WIOA - Needs Related Payment Procedures



## AGENDA ITEM SUMMARY

<b>Title</b>	Review and Approve the Workforce Innovation and Opportunity Act (WIOA) - Adult and Dislocated Worker Program Individual Training Account Policy Revisions
<b>Strategic Plans/Goals</b>	Operational Intelligence
<b>Policy/Plan/Law</b>	The Workforce Innovation and Opportunity Act of 2014 (WIOA), Sec.134(c)(3)(G)(ii), specifies that, with certain limited exemptions, all Title I Adult and Dislocated Worker training services shall be provided using Individual Training Accounts (ITAs).
<b>Action Requested</b>	Review and Approve the Workforce Innovation and Opportunity Act (WIOA) - Adult and Dislocated Worker Program Individual Training Account Policy Revisions
<b>Background</b>	<p>The Workforce Innovation and Opportunity Act promotes career seeker choice and designates ITAs for that purpose. Career seekers determined eligible and suitable are issued an ITA for training programs in alignment with occupations identified on the Local Targeted Occupations List (LTOL) and included on the approved Eligible Training Provider List (ETPL). WIOA Section 134 states that training services may include a program of one or more classes or courses, or a structured regimen, that upon successful completion leads to a certification/credential, an associate of science degree, a baccalaureate degree, completion of a registered apprenticeship program, or the skills or competencies needed for a specific job or jobs, an occupation, an occupational group, or generally, for many types of jobs or occupations, as recognized by employers and determined prior to training.</p> <p>Staff revised CSRC's local ITA policy to no longer require Official Transcripts based on guidance received via attachment to Administrative Policy P122, "Source Documentation for Core/Non-Core Programs DOL-only Data Element Validation."</p>
<b>Staff Recommendations</b>	Review and Approve the Workforce Innovation and Opportunity Act (WIOA) - Adult and Dislocated Worker Program Individual Training Account Policy Revisions
<b>Supporting Material</b>	Workforce Innovation and Opportunity Act (WIOA) - Adult and Dislocated Worker Program Individual Training Account Policy Revisions
<b>Board Staff</b>	<p>Tracey McMorris</p> <p>Vice President of Operations/COO</p> <p><a href="mailto:tmcmorris@careersourcerc.com">tmcmorris@careersourcerc.com</a></p> <p>1-866-482-4473 ext. 528</p>

**PURPOSE**

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

**REFERENCE**

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

**BACKGROUND**

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

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

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

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

**POLICY**

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

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

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

TIER	ENTRY WAGE FOR LWDA	MAXIMUM ITA INVESTMENT
Tier 1	\$15.19* to \$18.67 per hour	Up to \$7,500**
Tier 2	\$18.68 per hour	Up to \$10,000**
Tier 3	Related Instruction for Registered Apprenticeship	**See Below

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

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

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

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

7. On an annual basis, or in the case of scholarships, as they become available, the career seeker must apply for other training assistance (for example: Pell Grant, scholarships, and employer-sponsored training) to help assist with the cost of training and training related support. Any scholarships or grants received will be applied toward the total allowable tuition, books, and fees prior to determining the ITA amount.

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

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

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

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

ITAs are not transferable.

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ITAs are not transferable.

## AGENDA ITEM SUMMARY

<b>Title</b>	Review and Approve the Supplemental Nutrition Assistance Program (SNAP) - Employment and Training (E&T) Program Components and Case Management Policy
<b>Strategic Plans/Goals</b>	Operational Intelligence
<b>Policy/Plan/Law</b>	H.R.1-One Big Beautiful Bill Act 119 <sup>th</sup> Congress (2025-2026), 7 CFR § 273.7 – Work Provisions for SNAP recipients, 7 CFR § 273.24 – Time limits for ABAWDs. 20 CFR §§ 676-681 – WIOA performance accountability and planning, 20 CFR 678.410 (3) – One Stop Partners, 29 U.S.C. § 2101 – Workforce Innovation and Opportunity Act, Section 445.033; Florida Statutes – FloridaCommerce and Department of Children and Families local performance accountability and reporting, Florida SNAP E&T Plan.
<b>Action Requested</b>	Review and Approve CSRC's Supplemental Nutrition Assistance Program (SNAP) - Employment and Training (E&T) Program Components and Case Management Policy
<b>Background</b>	<p>The Florida SNAP E&amp;T Program is a federally funded initiative that helps recipients gain skills, training, and work experience for long term employment and economic self-sufficiency. The program is administered by the Florida Department of Children and Families (DCF), which determines eligibility and refers participants to LWDBs for services. The Florida Department of Commerce (FloridaCommerce) oversees service delivery through LWDBs and career centers. CareerSource Florida, the State Workforce Development Board, ensures alignment with statewide workforce goals, while LWDBs and career centers deliver program services, provide assessments, employment planning, component assignments, and other services. Collaborative efforts enhance engagement, compliance with federal and state requirements, and effective service delivery to support participant success and program accountability.</p> <p>Under Title 7, Code of Federal Regulations (CFR), sections 273.7 and 273.24, and Chapter 414.455, F.S., Florida operates a mandatory SNAP E&amp;T program for AbleBodied Adults Without Dependents (ABAWDs) and Mandatory Work Participants who do not meet an exemption. ABAWDs must meet specific work requirements to maintain benefits.</p>



Staff developed CSRCs local Supplemental Nutrition Assistance Program (SNAP) Employment and Training (E&T) Program.Components and Case Management Policy to mirror Administrative Policy Number P129.

**Staff  
Recommendations**

Approve the Supplemental Nutrition Assistance Program (SNAP) - Employment and Training (E&T) Program Components and Case Management Policy

**Supporting Material**

Approve the Supplemental Nutrition Assistance Program (SNAP) - Employment and Training (E&T) Program Components and Case Management Policy

**Board Staff**

Tracey McMorris  
Vice President of Operations/COO  
[tmcmorris@careersourcerc.com](mailto:tmcmorris@careersourcerc.com)  
(866) 482-4473 ext. 528



SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM (SNAP)  
EMPLOYMENT AND TRAINING (E&T)  
PROGRAM COMPONENTS AND CASE MANAGEMENT POLICY  
ORIGINAL APPROVAL DATE: 01/28/2026  
REVISION DATE: --/--/--  
BOARD EFFECTIVE DATE: 01/28/2026

## I. **PURPOSE**

Able Bodied Adults Without Dependents (ABAWDs) and mandatory work participants in the Supplemental Nutrition Assistance Program (SNAP) Education and Training (E&T) program are required to participate in activities operated by Local Workforce Development Boards (LWDBs) and local career centers. LWDBs deliver SNAP E&T components, including supervised job search, job search training, vocational and basic education, work experience, and job retention services. Timely access to SNAP E&T and other services is critical to removing barriers to participation and supporting successful employment outcomes.

This policy provides a comprehensive description of program components and activities required for operating the SNAP E&T program and requires CSRC to ensure local SNAP E&T strategies and operations align with the Florida SNAP E&T Plan and the Workforce Innovation and Opportunity Act (WIOA) Combined Plan. CSRC is also expected to align with Florida's workforce development priorities, focus on employment and training for ABAWDs and other mandatory work participants that lead to self-sustaining jobs, and implement data driven accountability measures to enhance service delivery and outcomes.

## II. **REFERENCES**

[H.R. 1 – One Big Beautiful Bill Act 119th Congress \(2025-2026\)](#)

[7 CFR § 273.7 – Work provisions for SNAP recipients.](#)

[7 CFR § 273.24 – Time limits for ABAWDs.](#)

[20 CFR §§ 676–681 – WIOA performance accountability and planning.](#)

[20 CFR 678.410\(3\) – One Stop Partners](#)

[29 U.S.C. § 3101 – Workforce Innovation and Opportunity Act.](#)

[Section 445.033, Florida Statutes – FloridaCommerce and Department of Children and Families local performance accountability and reporting.](#)

[Florida SNAP E&T Plan](#)

## III. **BACKGROUND**

The Florida SNAP E&T Program is a federally funded initiative that helps recipients gain skills, training, and work experience for long-term employment and economic self-sufficiency. The program is administered by the Florida Department of Children and Families (DCF), which determines eligibility and refers participants to LWDBs for services. The Florida Department of Commerce (FloridaCommerce) oversees service delivery through LWDBs and career centers. CareerSource Florida, the State Workforce Development Board, ensures alignment with statewide workforce goals, while LWDBs and career centers deliver program services, provide assessments, employment planning, component assignments, and other services. Collaborative efforts enhance engagement, compliance with federal and state requirements, and effective service delivery to support participant success and program accountability.

Under Title 7, Code of Federal Regulations (CFR), [sections 273.7](#) and [273.24](#), and [Chapter 414.455, F.S.](#), Florida operates a mandatory SNAP E&T program for ABAWDs and Mandatory Work Participants (MWP) who do not meet an exemption. ABAWDs must meet specific work requirements to maintain benefits.



#### IV. LOCAL POLICY

##### A. **Program Access and Participant Engagement**

###### 1. **Referral Process**

Consistent with [7 CFR 273.7](#) DCF screens SNAP recipients and refers eligible individuals to CSRC via the One-Stop Service Tracking ([OSST](#)) system. CSRC must review referrals daily and initiate contact within 10 calendar days for ABAWDs. This process must be documented.

CSRC should establish referral protocols with local DCF offices and relevant DCF staff, to ensure timely and accurate referrals to connect participants to wraparound services (e.g., housing, mental health, and substance abuse recovery) and promote a holistic approach to economic self-sufficiency. Staff must maintain regular communication with DCF partners and document referrals and outcomes in [OSST](#).

###### 2. **Orientation and Initial Engagement**

Individuals referred to the SNAP E&T program will receive an Employment and Training Referral (ETR) notification letter instructing the participant to complete specific steps via [OSST](#) within seven (7) days. The ETR provides participants with information to complete the orientation, assessment, and schedule options for the initial engagement appointment with a case manager. All steps must be completed within the seven (7) day window to avoid [OSST](#) beginning the automated consideration process with DCF to determine if the reason for being non-compliant is related to good cause. The orientation and assessment may be completed online or in-person for individuals who are not computer literate or do not have access to a computer or internet.

The orientation must outline why the participant is referred to the program, an overview of the SNAP E&T program components, participation expectation/requirements, and available support services. The orientation is a required activity for newly referred or reopened referrals for participants who have not completed orientation within the previous 12 months. Participants may also be required to complete orientation if there have been significant program changes, regardless of the time frame of last attendance.

WT/SNAP Program Career Planners must inform participants of grievance procedures, their rights, responsibilities, and the consequences of noncompliance. In addition, the participant must acknowledge receipt of this information by signing the Opportunities and Obligations Form. Staff should maintain a copy of the signed form in the participant's case file and provide a copy to the participant for their records.

###### 3. **Eligibility Verification**

WT/SNAP Program Career Planners confirm the participant's eligibility using DCF referral data housed in their management information system and [OSST](#) records to ensure the individual has been properly referred and does not appear to meet an exemption as outlined in the most current programmatic guidance and current federal law. Staff should confirm this information at the time of the initial engagement appointment prior to assigning the participant to a program component. If it is determined the participant may meet an exemption, staff must instruct the participant to notify DCF of their household changes to allow DCF to determine whether the participant continues to meet the requirements for referral to the SNAP E&T program.



## **B. Assessment and Employability Planning**

As part of the online assessment, participants will answer questions that provide information on the participant's:

- academic and occupational skills
- career goals and interests
- personal needs/barriers
- employability skills
- work history

WT/SNAP Program Career Planners must review the assessment information with the participant during the initial engagement appointment to ensure accuracy. The information will be used throughout the employability planning process culminating in the creation of an Individual Employment Plan.

CSRC may use other assessment tools, in addition to the [OSST](#) Initial Assessment, to assist with employability planning/case management, such as Comprehensive Adult Student Assessment Systems (CASAS) tests, My Career Shines, Career Scope, and the CLIFF Dashboard. Additional assessments should be scheduled or conducted at the initial engagement appointment, as determined appropriate, prior to the participant being assigned to a program component. Further, CSRC may conduct additional assessments during program participation as the participants' needs change, or a new program component is being considered. In the event of a system outage, WT/SNAP Career Planners may conduct the assessment manually by using the [OSST Initial Assessment Form](#).

CSRC must ensure that WT/SNAP Program Career Planners are trained in techniques to facilitate a productive experience to include motivational interviewing, employability planning, coordination of services, and methods of ongoing progress monitoring.

## **C. Documentation and Compliance**

WT/SNAP Program Career Planners must document case management activities, participation hours, support services, participant reimbursements, supporting documentation, and outcomes in [OSST](#) and the participant's case file in a timely and accurate manner. It is recommended that documentation of activities occur within two days of provision. Case files must include verification of participation (i.e., timesheets, attendance records, check stubs, etc.), documentation supporting participant reimbursements, support service referrals, and any correspondence related to the participant's progress or challenges. Documentation may be submitted to staff either in-person or virtually (i.e., email, upload to document management system, etc.).

### **1. IEP Development**

To ensure effective service delivery and alignment with participant goals, all participants must have an Individual Employment Plan (IEP) developed and maintained in the participant case file and a summary documented via case notes in [OSST](#). IEP development should use the S.M.A.R.T. (Specific. Measurable. Achievable. Relevant. Time-Bound) principles and include sector strategies and career pathways principles as described in CareerSource Florida Workforce Policies [03 – Sector Strategies Policy](#) and P10 – Comprehensive Employment Education and Training Strategy and implemented in WIOA Local Plans.



## 2. IEP Processing Steps and Completion Timeline

The IEP must identify appropriate SNAP E&T components, support services, and co-enrollment opportunities with WIOA or other workforce programs. IEPs should reflect both short-term and long-term employment and educational goals, informed by labor market information and participant interests. The IEP must be initiated during the initial engagement appointment. Completion of the IEP means the IEP has been signed by the participant and staff or otherwise documented in [OSST](#). All contact attempts made to complete or update the IEP must also be documented in case notes.

## D. SNAP E&T Components

A qualifying SNAP E&T component is considered standalone and can count for part or all of the monthly work requirement for ABAWDs and MWPs. WT/SNAP Program Career Planners must assign participants to appropriate SNAP E&T components (upon completion of assessment), document component assignments in [OSST](#), and update the IEP accordingly.

Work components and activities under the SNAP E&T program are outlined in [7 CFR 273.7](#) and further defined in the SNAP E&T State Plan. Participants may be enrolled in one or more qualified components each month to satisfy the program's mandatory work requirement.

Note: Supervised job search and job search training are non-qualifying components unless paired with a qualifying activity. Supervised job search and job search training activities, when offered as part of other E&T program components, are acceptable as long as those activities comprise less than half the total required time spent in the components.

WT/SNAP Program Career Planners must assess participants for co-enrollment opportunities in WIOA and other workforce programs. Co-enrollment can fill service or funding gaps (e.g., training, support services), provide access to additional work-based learning (e.g., On-the-Job Training and apprenticeships), and maximize participant outcomes through layered support. WT/SNAP Program Career Planners must document co-enrollment decisions in [OSST](#) and coordinate with WIOA Career Planners to align services. Details on required components consistent with Florida's state plan include:

### 1. Supervised Job Search

Supervised Job Search (SJS) activities are guided and tailored to participant needs and employment goals and provide participants with increased opportunities to obtain employment. This component must occur at state approved locations such as CSRC computer labs, CSRC community partner computer labs, public libraries, and on personal computers and/or devices while being supervised. Criteria that may be used to determine whether a location is deemed state-approved include:

- Locations that are open to the public with access to resources for job searching (i.e., computers/tablets, internet access, etc.)
- Locations that serve populations that are typically eligible for and/or recipients of food assistance benefits and fall into a barrier category such as ex-offenders, domestic violence victims, high school dropouts, disabled, etc.
- Locations that have an agreement with the state and/or CSRC that defines mutually agreed upon services to SNAP eligible individuals.
- Locations that are willing to assist individuals who are actively seeking employment and have the means to monitor (supervise) and track time that an individual spends job searching.
- Locations that have qualified and sufficient staff to assist with job searching, as well as monitoring (supervising) and tracking the time an individual spends job searching.

Supervised Job Search may be conducted independently or within a group setting, and may also be conducted remotely, in-person, or a combination of both. CSRC should tailor the delivery of supervised



job search services to the needs of participants. Participation in this component must be tracked and reflected on the Job Participation Rate Screen and in case notes. Supervised Job Search activities must have a direct link to increasing the employment opportunities of participants. A participant in the Supervised Job Search program must be likely to find a job through the activity, and appropriate jobs must be available for that participant in the community. Effective case management requires that supervised job search is not established as continuous, year-round activity for the program participant. Participants in supervised job search must have at least one meeting a month with a qualified staff member to review job search activities, get feedback, troubleshoot issues, and discuss next steps. This meeting may occur remotely or in-person and be synchronous with the job search activities or asynchronous and must be documented within [OSST](#). Interactive software or other types of automated processes on a computer do not meet the requirement for engagement with a qualified staff person at least once a month. In between meetings with a qualified staff person, CSRC may use other supervisory techniques, such as software that tracks time spent logged into a job search website or computer assessments that automatically identify next steps for the participant.

The hours assigned to Supervised Job Search for ABAWDs are limited to 39 hours monthly. If Supervised Job Search is combined with Job Search Training, the total combined hours cannot exceed 39 hours monthly. For MWPs, the activity is limited to 59 hours monthly. If combined with Job Search Training, the total combined hours cannot exceed 59 hours monthly.

## **2. Job Search Training**

Job Search Training is a component that enhances the job readiness of participants by teaching them job seeking techniques, increasing job search motivation, and boosting self-confidence. Job Search Training assists participants with development of essential job readiness/employability skills, through workshops or sessions to secure/retain employment. This component may consist of, but is not limited to, job skills assessments, classroom instruction, job development and placement services, and other direct training or support activities. It could also teach life and interpersonal skills, time management, decision making skills, appropriate dress for the workplace, career planning, and how to develop a resume.

The hours assigned to Job Search Training for ABAWDs are limited to 39 hours monthly. If combined with Supervised Job Search, the total combined hours cannot exceed 39 hours monthly. For MWPs, the activity is limited to 59 hours monthly. If combined with Supervised Job Search, the total combined hours cannot exceed 59 hours monthly.

## **3. Basic Education and Vocational Training**

The basic education component includes a wide range of activities that improve basic skills and the employability of participants. Such programs include Adult Basic Education (ABE), basic literacy, English as a Second Language (ESL), high school completion or general education equivalency (GED), career and technical education (CTE), and other post-secondary education.

Education components can offer participants an opportunity to earn postsecondary credentials valued by employers and industry, including certificates and degrees, industry-recognized credentials, and licensures.

Vocational Training helps to improve the employability of participants through training in a skill or trade that will allow the participant to move directly into employment. Training is offered at the career centers, through community partners, and training providers who are approved by CSRC and/or CareerSource Florida.





SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM (SNAP)  
EMPLOYMENT AND TRAINING (E&T)  
PROGRAM COMPONENTS AND CASE MANAGEMENT POLICY  
ORIGINAL APPROVAL DATE: 01/28/2026  
REVISION DATE: --/--/--  
BOARD EFFECTIVE DATE: 01/28/2026

An ABAWD can complete 80 hours monthly in basic education and/or vocational training to meet the mandatory work requirement. An MWP can complete 120 hours monthly in basic education and/or vocational training to meet the mandatory work requirement.

Participants assigned to education components (basic education/vocational training), may be allowed one hour of study time for each hour of class time completed, as long as documented verification is provided of the actual time spent in the classroom. Education may be provided onsite or through online classes. [OSST](#) must be updated with the number of hours completed (including study time) and documentation maintained in the participant's case file.

Education components (basic education/vocational training) may be combined with the following components.

- a. Supervised Job Search
- b. Job Search Training
- c. Work Experience

WT/SNAP Program Career Planners are strongly encouraged to review program participants who are interested in Vocational Training for co-enrollment in the WIOA program.

#### **4. Work Experience**

Work Experience programs include a planned, structured learning experience that takes place in a workplace for a limited amount of time. These activities are designed to connect participants with employers to build employability skills or job-related skills through actual work experience or training at a worksite. In lieu of wages, participants receive compensation in the form of their monthly food assistance allotment. Work experience sites can be developed with not-for-profit, for profit, private, and public employers. Worksite agreements, as well as job descriptions for each work experience position, must be obtained by staff prior to assigning participants to a worksite.

Participants may identify a worksite that aligns with their career path. However, the participant will not be assigned to work experience at the worksite until an agreement with the site has been executed. When a participant is assigned to a worksite, the employer cannot replace regular employees with participants performing work experience. The employer must also provide participants with the same or similar work conditions and assignments as regular employees and is required to supervise work activities and complete time sheets for participants.

Hours assigned to work experience must not exceed the allowable hours derived from the benefit calculation. To determine the benefit calculation, staff will use the participant's monthly food assistance allotment divided by the current state minimum wage which equals the monthly required hours. If there is more than one participant within a household, the monthly required hours will be further divided by the number of participants to derive the number of hours that each career seeker will need to complete monthly. If the number of hours determined by the benefit calculation is not enough to satisfy the work requirement for the participant type, additional program components must be assigned.

Work experience may be combined with the following components.

- a. Supervised Job Search
- b. Job Search Training
- c. Education Basic Education
- d. Vocational Training

In case there are additional members in the household receiving SNAP benefit, CSRC must verify with DCF for an accurate number of hours for assigning under Work Experience.



## **5. Job Retention Services/Employment Retention Services (ERS)**

The Job Retention Services (commonly known as Employment Retention Services or ERS) components are continued supportive services to help a SNAP E&T participant continue in their first months on their job. The activities help participants even if their new employment income makes them no longer eligible to receive SNAP benefits. Participants are eligible for at least 30 days and up to 90 days after securing employment and within 30 days of successful completion of a SNAP E&T program component. Participants are not eligible to receive ERS if they are leaving the SNAP E&T program due to a failure to comply with the general work requirement or an intentional program violation.

All reimbursements considered under ERS must be reasonable, necessary, and directly related to the participant's employment, such as uniforms/clothing required for the job, equipment or tools required for the job, and/or transportation. Other items may be considered for ERS if they meet the criteria.

## **E. Support Services and Participant Reimbursements**

Participants may be provided reimbursement for costs associated with program participation, including transportation, work-related expenses, costs for books, supplies and tools, digital supports, clothing and uniforms, and other expenses, as needed and allowable. WT/SNAP Program Career Planners must document participation hours, support services, participant reimbursements, supporting documentation, outcomes and ensure services are reasonable, necessary, and directly related to participation in program components.

WT/SNAP Program Career Planners must obtain and retain documentation, including receipts, for verification and audit purposes. Self-attestation may be used in some circumstances to document expenses; however, staff should use this option as a last resort and must include a justification documented in case notes. Self-attestation forms will be used for items in value of \$100.00 or less. CSRC should use the SNAP [Self Attestation Form Template](#) for documentation purposes.

## **F. Braiding Funding and Leveraging Resources**

CSRC is encouraged to braid SNAP E&T funds with WIOA and other local, state, or community resources to expand access and supplement service capacity to training and support services, increase reimbursement opportunities, and support innovative service delivery models.

WT/SNAP Program Career Planners and CSRC must actively pursue opportunities to braid SNAP E&T funds with other workforce and community resources to maximize participant access to training, support services, and employment opportunities; fill service gaps not covered by a single funding source; and increase the efficiency and impact of program investments.

CSRC should establish clear agreements with their partners, define roles and responsibilities, and track outcomes to ensure transparency and accountability. CSRC should also maintain documentation of such agreements and a list of applicable partnerships.

## **G. Provider Determination**

There may be instances where a participant may be ill-suited for a particular Education and Training component, despite the participant's best efforts to remain in the program. Based on the WT/SNAP Program Career Planner's assessment of the participant's fit with the work component and after documented efforts to explore all available alternative program components, the WT/SNAP Program Career Planner may record the participant as failing the work requirement. All assessments of fit and





documented efforts to identify an alternative work component must be maintained as part of case management prior to this determination and must contain documented supervisor approval. The SNAP E&T program, in accordance with [7 CFR 273.7](#) (c)(18)(i)(A), allows for CSRC to process a provider determination for DCF to consider an exemption.

## **H. Case Management and Compliance Monitoring**

### **1. Ongoing Case Management**

WT/SNAP Program Career Planners must maintain regular contact with SNAP E&T participants to monitor progress and address ongoing barriers. WT/SNAP Program Career Planners must update [OSST](#) with customer participation hours, progress notes, and changes in status.

### **2. Participation Tracking**

WT/SNAP Program Career Planners must enter participation hours, support services, participant reimbursements, supporting documentation, outcomes and applicable documentation in [OSST](#) as soon as possible but no later than by the 10th business day following the end of the month.

Participants in partial month participation are required to participate (in any combination) in a minimum of 4 work hours per day, or 20 hours per week and MWPs are required to participate in a minimum of 6 work hours per day, or 30 hours per week. In this instance, the ABAWD/MWP will not be required to complete the required monthly participation hours. Participants in partial month participation who complete the partial hours for the given month will be considered compliant. For example, an ABAWD was referred for participation on June 9th with 15 business days remaining in the month. The ABAWD must complete 60 hours (15 days multiplied by 4 hours daily) to be considered compliant; anything less will be considered non-compliance.

### **3. Targeted Case Management**

Case management must be proactive, participant-centered, and focused on achieving measurable outcomes. Updates must be documented in [OSST](#), including progress notes, participation hours, and any changes to service strategies. WT/SNAP Program Career Planners must review and update the IEP based on CSRC's Local Operating Procedures or when there is a significant change in the participant's status, goals, or assigned activities. The approved IEP form may be accessed on FloridaCommerce's website.

### **4. Noncompliance and Good Cause Consideration**

If a SNAP E&T participant fails to comply with the requirements of the program, WT/SNAP Career Planners must initiate good cause consideration (GCC) review and document all issues. GCC participant cases must be referred to DCF for determination.

## **I. Data Entry and Reporting**

### **1. OSST System Use**

- a. WT/SNAP Program Career Planners must record all case management activities for participants including participation hours, support services, participant reimbursements, supporting documentation, and outcomes in [OSST](#). All data must be accurate and timely to support performance reporting. It is recommended that data entry is completed within 2 business days from provision.



## 2. [Employ Florida](#) Integration

- a. WTP/SNAP Program Career Planners working with SNAP E&T customers must ensure the participant registers in [Employ Florida](#) for job seeking, uploading resumes, exploring labor market services, and to document job referrals, placements, and employment outcomes.

## J. Exemptions

In accordance with [7 CFR 273.7\(i\)](#), DCF is responsible for determining outcomes from a good cause review for a SNAP recipient who does not complete applicable SNAP work requirements. Outcomes of the review may result in a determination of good cause or a sanction. Allowable exemptions are subject to change based on programmatic guidance.

WTP/SNAP Program Career Planners must ensure all necessary information is in case notes related to GCC request for an exemption. This will allow DCF staff to make an appropriate and accurate E&T decision for SNAP participants.



# Agenda Item 3e Executive Committee Meeting

**October 17, 2025**

***Opening Remarks***

1. Welcome & Attendance
2. Conflict of Interest Declaration

***Voting Items***

3. Review and Approve Financial Statement - August 2025
4. Review and Approve Internal Control Questionnaire (ICQ) for PY 2025-2026

***Information/Discussion***

5. CareerSource Research Coast (CSRC) Updates
  - Letter of Support - Brian Mast
  - Ad Hoc Search Committee - Board Membership
6. Adjournment - Next Executive Meeting - November 14, 2025

**Member Present**

Will Armstead

**Members Participating by Teleconference:**

Jim Brann                      Terrance Moore      Christi Shields  
Werner Bols

**Members Excused**

Bob Cenk                      Leslie Kristof

**Administrative Staff Present/Teleconference:**

Brian Bauer                      Lisa Delligatti              Jennifer Eimann  
Luis Bello



**Call to Order:**

Brian Bauer, President/CEO, called the meeting to order, as Jim Brann, Chair, was running late. A quorum was established.

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

Brian Bauer, President/CEO, asked if there were any Conflicts of Interest. None were declared.

**Agenda Item 3 - Review and Approve Financial Statements - August 2025:**

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

Ms. Delligatti stated that there are minimal comments for August since it represents the first month of significant activity for this program year.

Ms. Delligatti explained that the negative balances shown at the bottom of the report where expenditure exceeds funding are temporary timing issues related to Florida Commerce's payment process changes:

- Previous Process: Weekly funding requests with money received by the following Tuesday
- Current Process (since April): Bi-weekly funding requests with additional documentation requirements, resulting in a week or more delay after submission
- Status: All negative balances from August were recovered in September

LWDB20 maintains sufficient unrestricted funds to cover any shortages exceeding two weeks at month-end, ensuring no use of funds outside designated programs.

Ms. Delligatti shared ITA Performance:

- Annual Target: 40%
- Current Performance (as of August): 41%

Ms. Delligatti explained that the Adult program expenditures are currently being covered with Dislocated Worker funds from the 2024 allocation. With \$600,000 remaining in the Dislocated Worker funding stream, this will continue until those funds are exhausted. The organization can reallocate funding between Adult, Dislocated Worker, and Wagner-Peyser programs to cover career services costs.

In addition, a new 470 grant has been added, effectively replacing last year's HOPE funding.

Ms. Delligatti discussed whether any federal shutdown impact is to be expected.

**WIOA Funding**

- No impact expected—WIOA funds remain available.



### **SNAP Program**

- Current NFA ended September 30th
- Sufficient cash was drawn down to cover operations through October
- If new funding is delayed, excess funds from the old allocation will sustain the program
- Florida Commerce will perform a cash adjustment once the new NFA is released
- Program continuation is secure through end of October; beyond that depends on day-to-day developments
- Funding
- The organization has been assured it will be made whole

Overall Assessment: No jeopardy to operations with current funding levels

With no further discussion, Werner Bols moved to approve the Financial Statements – August 2025, as presented. Terrance Moore seconded the motion, which passed unanimously.

### **Agenda Item 4 - Florida Department of Commerce (FLORIDACOMMERCE) Internal Control Questionnaire (ICQ) and Assessment - PY 2024-2025:**

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

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

William Armstead made a motion to approve the acceptance of the Florida Department of Commerce (FLORIDACOMMERCE) Internal Control Questionnaire (ICQ) and Assessment - PY 2025-2026, as presented. Terrance Moore seconded the motion. The motion passed unanimously.

### **Agenda Item 5 - CareerSource Research Coast (CSRC) Updates:**

Brian Bauer, President/CEO, updated the committee on the following items:

Letter of Support - Brian Mast: Brian Bauer stated that the National Association of Workforce Boards has been actively engaging with legislators—communicating daily when Congress was in session—though current advocacy efforts are paused due to the federal government shutdown and the House being out of session.

At the local level, the LWDBs submitted letters to our representatives and decision-makers. The Executive Committee agenda packet includes the letter sent on behalf of the board and Board Chair James Brann, following Mr. Bauer's meeting with Representative Mask and his aide. Mr. Bauer stated the Mr. Mast's office was briefed on WIOA, our performance indicators, and metrics to demonstrate how this funding impacts their constituents and local employers. We emphasized that WIOA investments deliver meaningful results and benefits to their communities.



Mr. Bauer stated that he wanted to update the Committee on this situation, and we'll continue monitoring developments. However, progress has stalled due to the broader federal shutdown. As Lisa mentioned, our primary concern is granting funding continuity. Since the federal program year runs October through September, we currently have no approved budget in place as of October 1st.

#### Ad Hoc Search Committee/Board Membership:

This week, Mr. Bauer held meetings with two key economic development leaders:

- Mark Litton - New Executive Director of the Indian River Economic Development Council (replacing Helene). He previously worked in economic development in the Jacksonville area and is familiar with the Resource network. An application for his board seat will be sent.
- Doug Dombrowski - New economic development representative for the Indian River County Board of County Commissioners.

#### Board Membership Updates

- Andrea Beam - New Chamber President for Indian River County will receive an application for the rotating chamber seat (currently held by Phil Cantrebone).
- Wayne Olson replacement - The Department of Education's Vocational Rehabilitation will assign a replacement for the retiring Wayne Olson.
- David Bean's position - One private sector seat remains vacant following his recent resignation. The organization has 12 months to fill this position.

#### Facilities Update:

The new office is fully operational with only minor HVAC issues remaining. Key facility developments include:

- Martin County REACH Building - Facility use agreement is being finalized for a satellite location, with an anticipated move-in date of January 2026.
- Additional Administrative Space - The current landlord has offered 4,000 square feet of independent space for the administrative team at the same rate, with the landlord covering all build-out costs. This would allow the entire administrative team to return to office.

#### Staffing Update:

Mr. Bauer stated that the organization is nearly fully staffed:

- One migrant seasonal farm worker position remains vacant, with a solution in progress
- All TANF and WT Career Planner positions are filled

#### **Agenda Item 6 - 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 8:33 a.m.

*Next Executive Committee Meeting – November 14, 2025*



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**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.

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Brian Bauer  
Board Secretary

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Date



# Agenda Item 3eii Executive Committee Meeting

**November 14, 2025**

## **Opening Remarks**

1. Welcome & Attendance
2. Conflict of Interest Declaration

## **Voting Items**

**Added: James Moore and Company Presentation of the Financial Statements Audit Draft - June 30, 2025, and 2024 (GO STRAIGHT TO NUMBER 4 BELOW FOR VOTE)**

3. Review and Approve September Financial Reports - PY 2025-2026
4. Review and Approve Acceptance of the Financial Statements Audit Draft - June 30, 2025, and 2024
5. Review and Approve Acceptance of the Nomination of Mark Litten's Appointment to the Workforce Development Board of the Treasure Coast
6. Review and Approve Board Member CareerSource Florida Contract COI Exemption Request - PY 2025 - 2026

## **Information/Discussion**

7. CareerSource Research Coast (CSRC) Updates
  - Release of Workforce Innovation Opportunity Act (WIOA) Youth Services Request for Proposal (RFP)
  - Ad Hoc Search Committee - Board Membership
  - CareerSource Florida Board/Council Meetings/Day at the Capitol - January 27-28, 2026
  - Organizational Updates
8. Adjournment - Next Committee Meeting - December 12, 2025, if necessary

## **Member Present**

Leslie Kristof      Jim Brann      Terrance Moore

## **Members Participating by Teleconference:**

Christi Shields

## **Members Excused**

Bob Cenk      Werner Bols      William Armstead

## **Administrative Staff Present/Teleconference:**

Brian Bauer      Tracey McMorris      Lisa Delligatti  
Jennifer Eimann      Luis Bello



**Call to Order:**

Jim Brann, Chair, called the meeting to order at 8:05 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 Added - James Moore and Company Presentation of the Financial Statements Audit Draft -June 30, 2025, and 2024:**

Corrine LaRoche, James Moore Certified Public Accountants & Consultants, presented the overall findings from the draft audit of the financial statements for June 30, 2025, and 2024, to the Executive Committee. Discussion included the following:

Audit Adjustments – None

Audit Reports:

- Report on Financial Statements (pages 1-3), Unmodified Opinion
- Report on Internal Control and Compliance (pages 24-25), No findings
- Report on Compliance for Major Federal Program (pages 30-32), No findings

Financial Highlights:

- Revenues (page 9) \$5,517,298 (Charges for Services, Operating Grants, Gain on Lease Termination, and Investment Income)
- Federal Grants: Decrease \$706,000 (12.2% from prior year)
- Local grants: Increase \$52,000 (38.9%) from prior year
- Charges for Services: Decrease \$14,000 (32.2% from prior year)

Expenses Full Accrual (page 9) - \$5,339,038

- Decrease \$694,000 (11.5%) from prior year

Net Position (page 8) - \$275,519

- Total: Increase - \$181,000 (191.8% from prior year) Unrestricted: Decrease - \$24,000 (3% from prior year)
- Unrestricted: Decrease \$3,000 (1.8%) from prior year

**Agenda Item 4 - Review and Approve Acceptance of the Financial Statements Audit Draft - June 30, 2025, and 2024:**

Jim Brann, Chair, asked if any committee members had any questions regarding the presentation of the Financial Statements Audit Draft. With no further discussion, Mr. Brann announced that the committee would proceed directly to agenda item 4 for a vote before returning to item 3 for review and approval.

Leslie Kristof moved to approve the Acceptance of the Financial Statements Audit Draft - June 30, 2025, and 2024, as presented. Christi Shields seconded the motion, which passed unanimously.

**Agenda Item 3 - Review and Approve September Financial Reports - PY 2025-2026:**

Lisa Delligatti, CFO, provided an update on the current financial status. Ms. Delligatti stated that Dislocated Worker and some Wagner-Peyser funding is being used to cover Adult expenditures. There is \$600,00 of Dislocated Worker program monies still available. Those monies will fund expenditures for November and December. Ms. Delligatti stated that she expects that in January, CSRC will start using our Adult 2025 money.

The SNAP funding was fully exhausted in September. For October, CSRC deployed Wagner-Peyser Network Navigator (Web 7B) funds to cover October SNAP activities. Ms. Delligatti stated that the LWDBs are waiting to see if they will be receiving SNAP funding in November. If not, then going into November, we'll still be using that Wagner-Peyser money.

At the end of September, our state ITA was hovering just short of 45%, so we meeting that metric.

Leslie Kristof moved to approve the September Financial Reports - PY2025-2026, as presented. Terrance Moore seconded the motion, which passed unanimously.

**Agenda Item 5 - Review and Approve Acceptance of the Nomination of Mark Litten's Appointment to the Workforce Development Board of the Treasure Coast:**

Brian Bauer, President/CEO, announced Mark Linton has accepted an appointment to replace outgoing board member Helene Caseltine. Andrea Beam has also accepted an appointment to replace Dori Stone's seat on our board, designated for the Chambers of Commerce representing our three-county service area. We are still waiting for Ms. Beam's application.

Mr. Bauer stated he will convene a meeting of the Treasure Coast Workforce Consortium (TCWC) to present applications for acknowledgment and official endorsement. Following the TCWC endorsement, both applications will be submitted to the full Board of Directors at the January 28, 2026, meeting for review and approval. Their terms will begin on July 1<sup>st</sup>, 2025, to align with the fiscal year start. Until that date, they will participate as non-voting members.

There are still three board seats that require replacement. The Ad Hoc Committee is working on these replacements and will address all vacancies systematically.

Leslie Kristof moved to approve the Acceptance of the Nomination of Mark Litten's Appointment to the Workforce Development Board of the Treasure Coast, as presented. Christi Shields seconded the motion, which passed unanimously.

**Agenda Item 6 - Review and Approve Board Member CareerSource Florida Contract COI Exemption Request - PY 2025 – 2026:**

Brian Bauer, President/CEO, stated that the Business Services team has secured an On-the-Job Training (OJT) opportunity with the St. Lucie County Board of County Commissioners. A current board member, Jamie Fowler, affiliation with the county that requires that a Conflict-of-Interest Disclosure be reviewed and approved for Commissioner Fowler.

Staff is asking that the Executive Committee approve OJT contracts with St. Lucie County Board of County Commissioners, not to exceed \$10,000

Leslie Kristof moved to approve the Board Member CareerSource Florida Contract COI Exemption Request - PY 2025 - 2026, as presented. Christi Shields seconded the motion, which passed unanimously.

**Agenda Item 7 - CareerSource Research Coast (CSRC) Updates:**

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

**Release of WIOA Youth Services Request for Proposal (RFP):**

The board previously approved this request for proposal (RFP) in November of last year. While approval was granted early to allow adequate preparation time, staff wanted to provide a reminder that the youth services contract will be going out for bid, as the current five-year contract with Eckerd is expiring. The RFP timeline has been established to present the results and recommendations to the board at the April meeting.

**CareerSource Florida Board/Committee Meeting/Day at the Capitol 2026:**

- Dates: January 27-28, 2026 (Tuesday-Wednesday)
- FWDA coordinating local delegation meetings on workforce development priorities
- Committee members encouraged to participate; registration through Jennifer Eimann

**Administrative Office Relocation**

The transition to the new administrative facility is planned to be completed by January 1, 2026, pending certificate of occupancy and final agreement execution.

Key features include:

- Separate hallway system from the career center while maintaining co-location benefits
- Independent entrance and self-contained bathroom facilities
- Dedicated break room with sink installation
- Enhanced operational independence while preserving partnership accessibility

**REACH Facility Development (Martin County)**

Leadership met with Martin County representatives George Stokas and Ted Astolfi, along with other partners, to finalize the establishment of the REACH office.

- Lease agreement in the final negotiation phase. The outstanding issue involves a discrepancy in insurance requirements (the county requires \$1M/\$3M liability coverage, whereas the current coverage is \$1M/\$2M).
- A new Site Supervisor position was created to manage facility operations and coordinate with county requirements
- Facility will serve as a regional training hub for Martin County
- Staff will manage event and training calendars for multiple providers
- Focus on connecting non-college-bound high school graduates with career pathways

**Program Focus Areas:**

- Aviation and advanced manufacturing training
- CNA certification programs
- Industry-specific English as a Second Language (ESL) curriculum using rural grant funding
- Employability and soft skills development
- Partnership with Martin County school districts for career readiness initiatives

**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 9:05 a.m.

*Next Executive Committee Meeting – December 12, 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.

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Brian Bauer  
Secretary

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Date

## AGENDA ITEM SUMMARY

<b>Title</b>	Review and Approve October and November Financial Reports
<b>Strategic Plans/Goals</b>	Optimal Use of Resources
<b>Policy/Plan/Law</b>	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's
<b>Action Requested</b>	Review and Approve October and November Financial Reports
<b>Background</b>	The Board approved the budget for PY 2025-2026. The Executive Committee regularly reviews budgets, all amendments to the budget, and monthly expenditures.
<b>Staff Recommendations</b>	Review and Approve October and November Monthly Financial Reports
<b>Supporting Material</b>	October and November Financial Reports
<b>Board Staff</b>	Lisa Delligatti Chief Financial Officer <a href="mailto:ldelligatti@careersourcerc.com">ldelligatti@careersourcerc.com</a> (866) 482-4473 ext. 430

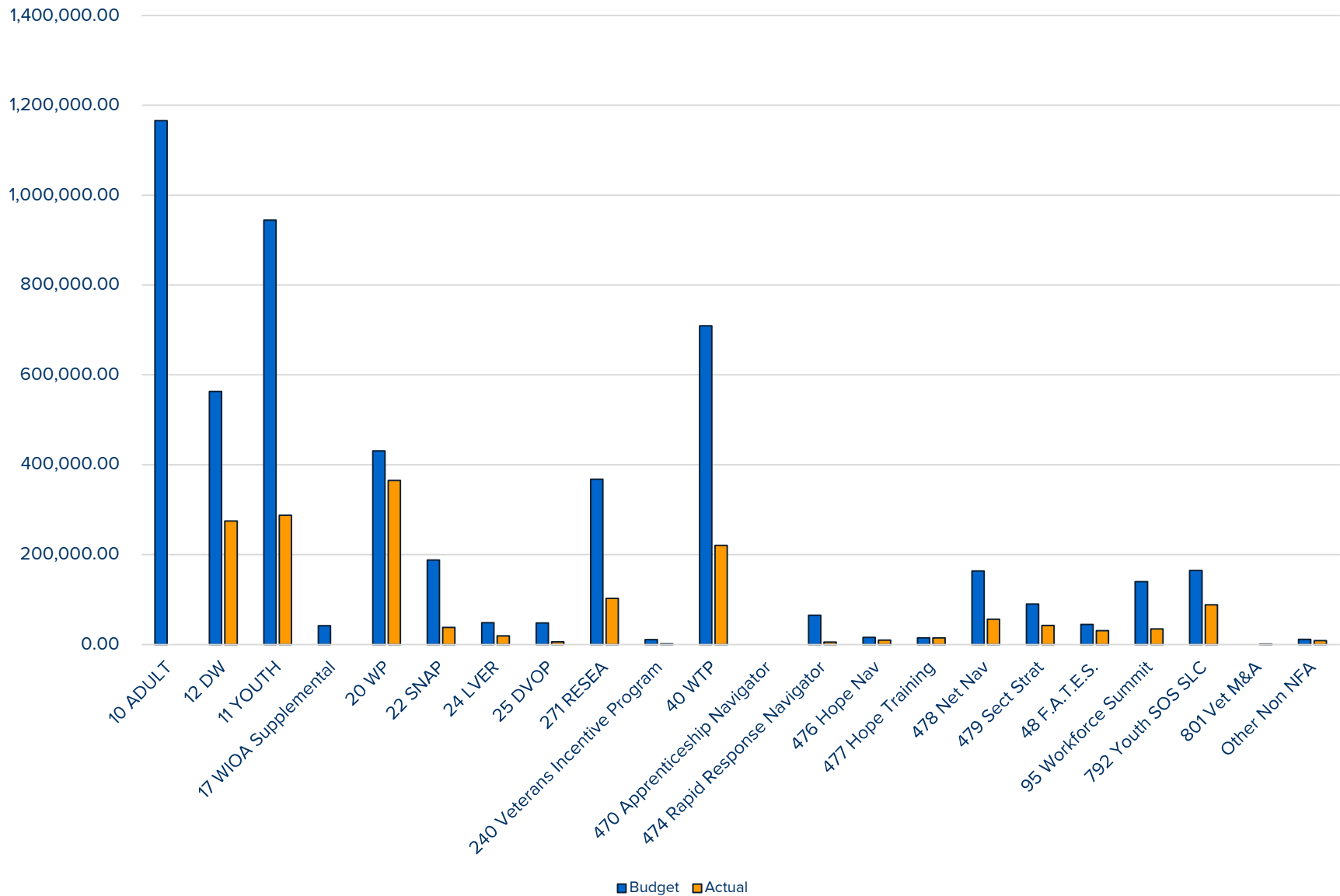
LWDB 20  
Summary of Funding and Expenditures  
As of October 31, 2025

PY 25-26 TOTAL AVAILABLE FUNDING	INDIRECT	10 ADULT	12 DW	11 YOUTH	17 WIOA Supplemental	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	240 Veterans Incentive Program	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	\$ 11,095	\$ 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	\$ 11,095	\$ 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	\$ 11,095	\$ 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	240 Veterans Incentive Program	40 WTP	470 Apprent Navigator	474 Rapid Response Navigator	476 Hope Navigator	477 Hope Training
PY 25-26 Allocations		\$ -	\$ -	\$ -	\$ -	\$ 37,490	\$ -	\$ 10,244	\$ 1,869	\$ -	\$ 11,095	\$ 34,540	\$ -	\$ 4,400	\$ -	\$ -
PY 25-26 Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 26-27		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 24-25		\$ -	\$ 253,940	\$ 246,097	\$ 28,608	\$ 300,430	\$ 37,812	\$ 6,577	\$ 4,248	\$ 93,445	\$ -	\$ 211,255	\$ -	\$ -	\$ 9,686	\$ 14,620
Total DEO Grant Funding		\$ -	\$ 253,940	\$ 246,097	\$ 28,608	\$ 300,430	\$ 37,812	\$ 6,577	\$ 4,248	\$ 93,445	\$ -	\$ 211,255	\$ -	\$ 4,400	\$ 9,686	\$ 14,620
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL		\$ -	\$ 253,940	\$ 246,097	\$ 28,608	\$ 300,430	\$ 37,812	\$ 6,577	\$ 4,248	\$ 93,445	\$ -	\$ 211,255	\$ -	\$ 4,400	\$ 9,686	\$ 14,620
% of Total Budgeted Funding Received		0.00%	45.09%	26.05%	68.03%	69.70%	20.13%	13.63%	8.84%	25.38%	0.00%	29.77%	#DIV/0!	6.77%	61.18%	0.00%
EXPENDITURES																
Administrative	\$ -	\$ -	\$ 28,714	\$ 8,900	\$ -	\$ 55,003	\$ 4,366	\$ 1,333	\$ 629	\$ 12,907	\$ 205	\$ 28,226	\$ -	\$ 658	\$ 1,053	\$ 1,847
Salaries and Benefits	\$ 113,052	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 65,014	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (178,067)	\$ 52,857	\$ 4,012	\$ 8,900	\$ -	\$ 24,507	\$ 7,781	\$ 2,128	\$ 877	\$ 12,907	\$ 205	\$ 28,226	\$ 111	\$ 658	\$ 2,410	\$ 4,926
Reclassification	\$ -	\$ (52,857)	\$ 24,702	\$ -	\$ -	\$ 30,495	\$ (3,415)	\$ (796)	\$ (248)	\$ -	\$ -	\$ -	\$ (111)	\$ -	\$ (1,357)	\$ (3,079)
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ -	\$ 246,084	\$ 278,605	\$ -	\$ 309,870	\$ 33,446	\$ 17,767	\$ 5,487	\$ 89,689	\$ 1,203	\$ 192,308	\$ -	\$ 4,581	\$ 8,633	\$ 12,773
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 230,843	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 71,810	\$ 165,518	\$ 10,274	\$ 8,125	\$ -	\$ 26,673	\$ 23,978	\$ 4,580	\$ 925	\$ 62,092	\$ -	\$ 84,009	\$ 435	\$ 3,545	\$ 12,892	\$ 19,094
Contract Labor	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 10,155	\$ -	\$ -	\$ -	\$ -	\$ 24,908	\$ -	\$ -	\$ -	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,925	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ 25	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 690	\$ -	\$ -	\$ -	\$ -
Support Services ITA	\$ -	\$ 9,761	\$ 2,011	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 35	\$ -	\$ -	\$ -	\$ 100
Training-ITA/OST/TAA	\$ -	\$ 59,846	\$ 7,410	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 30	\$ -	\$ -	\$ -	\$ 1,419
Training-OJT	\$ -	\$ 38,994	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,359
Training-Cust/Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 970	\$ 2,138	\$ 339	\$ 533	\$ -	\$ 254	\$ 343	\$ 2,714	\$ 2,020	\$ 1,000	\$ -	\$ 1,362	\$ -	\$ 18	\$ 86	\$ 109
One Stop Shared Costs	\$ 4,915	\$ 31,551	\$ 1,770	\$ 1,713	\$ -	\$ 21,687	\$ 6,270	\$ 9,253	\$ 3,231	\$ 13,631	\$ -	\$ 20,073	\$ 532	\$ 656	\$ 2,394	\$ 5,017
Other Operating Expenses	\$ 7,019	\$ 21,962	\$ 2,819	\$ 33,156	\$ -	\$ 108,267	\$ 9,046	\$ 753	\$ 614	\$ 6,826	\$ -	\$ 45,848	\$ 29	\$ 48	\$ 122	\$ 275
Allocated Program Indirect	\$ (84,714)	\$ 25,146	\$ 1,909	\$ 4,234	\$ -	\$ 11,659	\$ 3,702	\$ 1,012	\$ 417	\$ 6,140	\$ -	\$ 13,428	\$ 53	\$ 313	\$ 1,147	\$ 2,347
Reclassification	\$ -	\$ (354,941)	\$ 219,553	\$ -	\$ -	\$ 141,330	\$ (20,047)	\$ (547)	\$ (1,721)	\$ -	\$ 1,203	\$ -	\$ (1,049)	\$ -	\$ (8,009)	\$ (20,947)
Total Expenditures	\$ 0	\$ -	\$ 274,798	\$ 287,504	\$ -	\$ 364,872	\$ 37,812	\$ 19,099	\$ 6,116	\$ 102,596	\$ 1,408	\$ 220,533	\$ -	\$ 5,239	\$ 9,686	\$ 14,620
Funding Over/(under) expenditures	\$ 0	\$ -	\$ (20,858)	\$ (41,407)	\$ 28,608	\$ (64,442)	\$ -	\$ (12,522)	\$ (1,868)	\$ (9,151)	\$ (1,408)	\$ (9,278)	\$ -	\$ (839)	\$ -	\$ -
YTD % of Budgeted Funds Expended		0.00%	48.79%	30.44%	0.00%	84.65%	20.13%	39.59%	12.73%	27.87%	12.69%	31.08%	#DIV/0!	8.06%	61.18%	0.00%

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

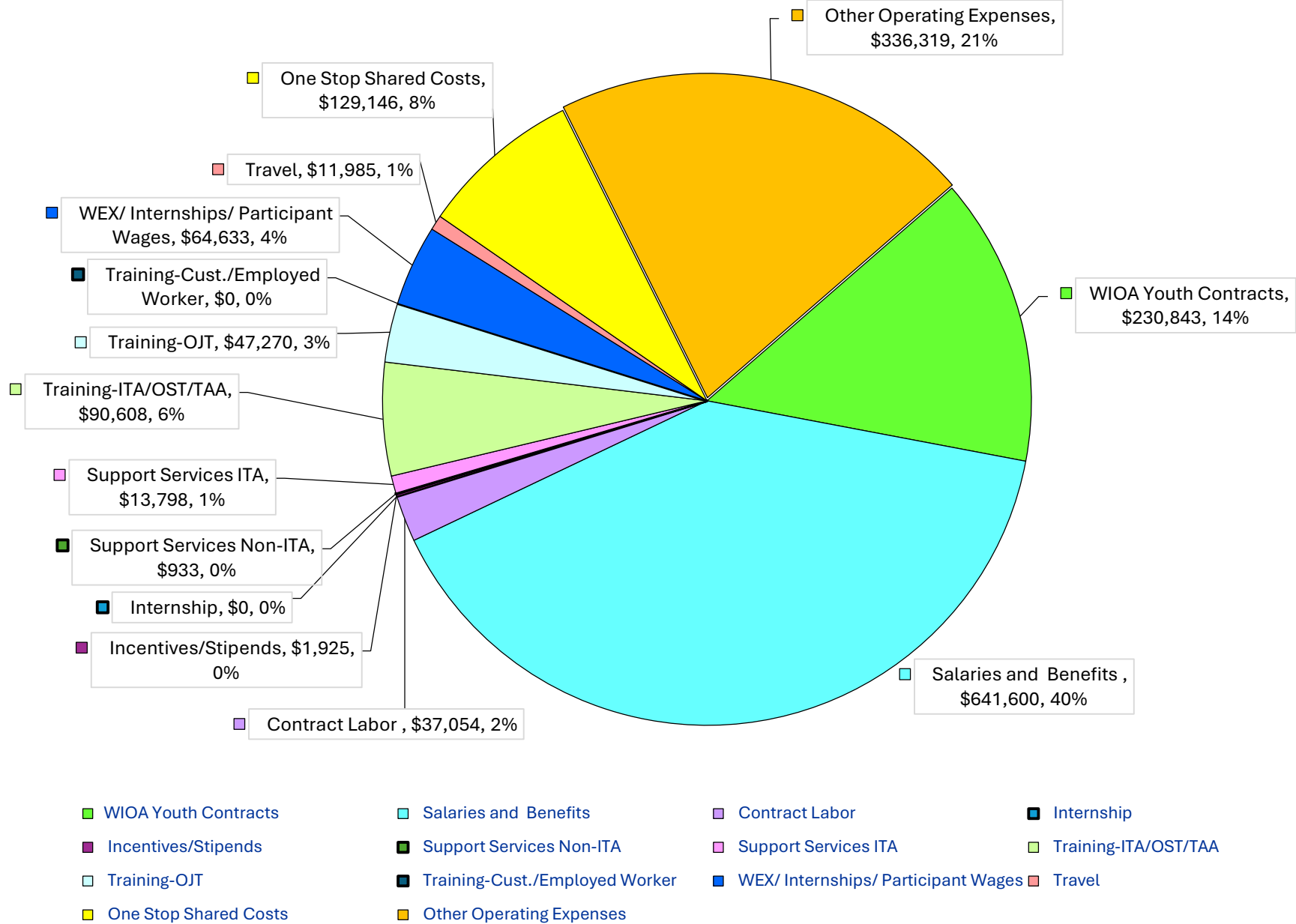
PY 25-26 TOTAL AVAILABLE FUNDING	478 Network Navigators	479 Sectors of Strategic Focus	48 F.A.T.E.S.	792 Youth SOS SLC	801 VMA	95 Workforce Summit	Other Non NFA	YEAR TO DATE TOTALS			
PY 25-26 Allocations	\$ 163,571	\$ 90,000	\$ -	\$ -	\$ 3,091	\$ 140,000	\$ -		\$ 6,050,905		
PY 25-26 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 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)	\$ -	\$ 3,091	\$ 140,000	\$ -		\$ 5,007,224		
OTHER NON DEO REVENUES	\$ -	\$ -	\$ 50,461	\$ 165,000	\$ -	\$ -	\$ 11,547		\$ 227,008		
TOTAL	\$ 163,571	\$ 90,000	\$ 44,728	\$ 165,000	\$ 3,091	\$ 140,000	\$ 11,547	\$ -	\$ 5,234,231		
FUNDING DRAWN DOWN YTD	478 Network Navigators	479 Sectors of Strategic Focus	48 F.A.T.E.S.	792 Youth SOS SLC	801 VMA	95 Workforce Summit	Other Non NFA	PY 25-26 Actual	PY 25-26 Budget	VARIANCE	% Expended
PY 25-26 Allocations	\$ 30,700	\$ 42,200	\$ -	\$ -	\$ 843	\$ 100,000	\$ -	\$ 273,382	\$ 6,050,905	\$ 5,777,523	4.518%
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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,206,720	\$ 2,034,681	\$ 827,961	59.308%
Total DEO Grant Funding	\$ 30,700	\$ 42,200	\$ -	\$ -	\$ 843	\$ 100,000	\$ -	\$ 1,480,102	\$ 5,007,224	\$ 3,527,122	29.559%
OTHER NON DEO REVENUES	\$ -	\$ -	\$ 50,461	\$ 109,287	\$ -	\$ -	\$ 3,494	\$ 163,242	\$ 227,008	\$ 63,766	71.910%
TOTAL	\$ 30,700	\$ 42,200	\$ 50,461	\$ 109,287	\$ 843	\$ 100,000	\$ 3,494	\$ 1,643,344	\$ 5,234,231	\$ 3,590,888	31.396%
% of Total Budgeted Funding Received	18.77%	46.89%	112.82%	66.23%	0.00%	71.43%	30.26%	31.40%			
EXPENDITURES								PY 25-26 Actual	PY 25-26 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ 7,610	\$ 4,723	\$ 4,138	\$ 11,933	\$ -	\$ 4,707	\$ 1,116	\$ 178,067	\$ 548,372	\$ 369,896	32.47%
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 113,052	\$ 402,460	\$ 289,407	28.09%
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 65,014	\$ 145,912	\$ 80,898	44.56%
Allocated Indirect Costs	\$ 3,528	\$ 2,446	\$ 4,138	\$ 11,933	\$ -	\$ 4,707	\$ 1,013	\$ 205	\$ (0)	\$ (205)	
Reclassification	\$ 4,082	\$ 2,277	\$ -	\$ -	\$ -	\$ -	\$ 103	\$ (205)	\$ -	\$ (205)	
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Program Training	\$ 48,661	\$ 37,412	\$ 26,598	\$ 76,657	\$ 843	\$ 30,171	\$ 7,261	\$ 1,428,047	\$ 4,680,486	\$ 3,252,439	30.5%
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 230,843	\$ 750,000	\$ 519,157	30.8%
Salaries and Benefits	\$ 18,883	\$ 10,642	\$ 632	\$ 3,382	\$ -	\$ -	\$ 1,059	\$ 528,548	\$ 2,228,511	\$ 1,699,963	23.7%
Contract Labor	\$ -	\$ -	\$ -	\$ 1,991	\$ -	\$ -	\$ -	\$ 37,054	\$ 9,347	\$ (27,707)	396.4%
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,925	\$ 14,198	\$ 12,273	13.6%
Support Services Non-ITA	\$ -	\$ -	\$ 50	\$ -	\$ -	\$ -	\$ 168	\$ 933	\$ 10,000	\$ 9,067	9.3%
Support Services ITA	\$ -	\$ -	\$ 1,891	\$ -	\$ -	\$ -	\$ -	\$ 13,798	\$ 54,895	\$ 41,097	25.1%
Training-ITA/OST/TAA	\$ -	\$ -	\$ 21,903	\$ -	\$ -	\$ -	\$ -	\$ 90,608	\$ 279,330	\$ 188,722	32.4%
Training-OJT	\$ -	\$ 2,916	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 47,270	\$ 320,746	\$ 273,476	14.7%
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ 64,633	\$ -	\$ -	\$ -	\$ 64,633	\$ 104,448	\$ 39,815	61.9%
Travel	\$ 62	\$ 34	\$ 4	\$ -	\$ -	\$ -	\$ -	\$ 11,985	\$ 16,190	\$ 4,205	74.0%
One Stop Shared Costs	\$ 3,523	\$ 1,540	\$ 136	\$ 189	\$ 843	\$ -	\$ 223	\$ 129,146	\$ 402,021	\$ 272,875	32.1%
Other Operating Expenses	\$ 286	\$ 222	\$ 14	\$ 786	\$ -	\$ 27,932	\$ 5,280	\$ 271,304	\$ 490,799	\$ 219,494	55.3%
Allocated Program Indirect	\$ 1,679	\$ 1,164	\$ 1,969	\$ 5,677	\$ -	\$ 2,239	\$ 479	\$ 0	\$ 0	\$ -	
Reclassification	\$ 24,228	\$ 20,895	\$ -	\$ -	\$ -	\$ -	\$ 52	\$ (0)	\$ -	\$ (0)	
Total Expenditures	\$ 56,271	\$ 42,135	\$ 30,736	\$ 88,590	\$ 843	\$ 34,878	\$ 8,377	\$ 1,606,114	\$ 5,228,854	\$ 3,622,330	30.7%
Funding Over/(under) expenditures	\$ (25,571)	\$ 65	\$ 19,725	\$ 20,697	\$ -	\$ 65,122	\$ (4,883)	\$ 37,230			
YTD % of Budgeted Funds Expended	34.40%	46.82%	68.72%	53.69%	27.27%	24.91%	72.55%	30.68%			

## Budget to Actual by Program





## PY 25-26 Expenditures by Category



Workforce Development Board of the Treasure Coast, Inc.  
Statement of Financial Position  
As of 10/31/2025

October 31, 2025

Assets

Current assets

Cash - Accounts Payable	5,111.93
Cash - Payroll	31,897.85
Cash - Business Checking W/Int.	517,639.06
Accounts Receivable Customers	111.03
Accounts Receivable - Other	545.48
Prepaid Expenses	29,912.54
Due TO/ Due FROM	2,585.91
Total Current assets	587,803.80

Non-current assets

Data Processing Equipment	119,215.39
Vehicles	447,386.10
Leasehold Improvements	217,855.62
Accumulated Depreciation	(724,716.63)
Other Assets	24,240.00
Total Non-current assets	83,980.48
Total Assets	671,784.28

Liabilities & Net Assets

Current Liabilities

Accounts Payable	70,109.57
Accrued Expenses	153,522.10
Federal Withholding Tax	(0.01)
FICA Payable	0.60
SUTA Payable	42.98
Principal Insurance	286.94
Difference Card Fees	(52.37)
Health Insurance Payable	1,990.35
AFLAC Payable	53.80
Legal Shield	96.84
Workers Comp Payable	5,944.22
Accrued Leave	80,222.32
Sick Leave Liability	44,265.49
Refundable Advances	1,935.77
Deferred Revenue	617.50
Total Current Liabilities	359,036.10

Non-current liabilities

Long-term Lease Liability	316,523.00
Lease Liability Offset	(316,523.00)
Total Non-current liabilities	0.00

Net Assets

Beginning of Year	1,032,582.20
Current Year	(719,834.02)
Total Net Assets	312,748.18
Total Liabilities & Net Assets	671,784.28

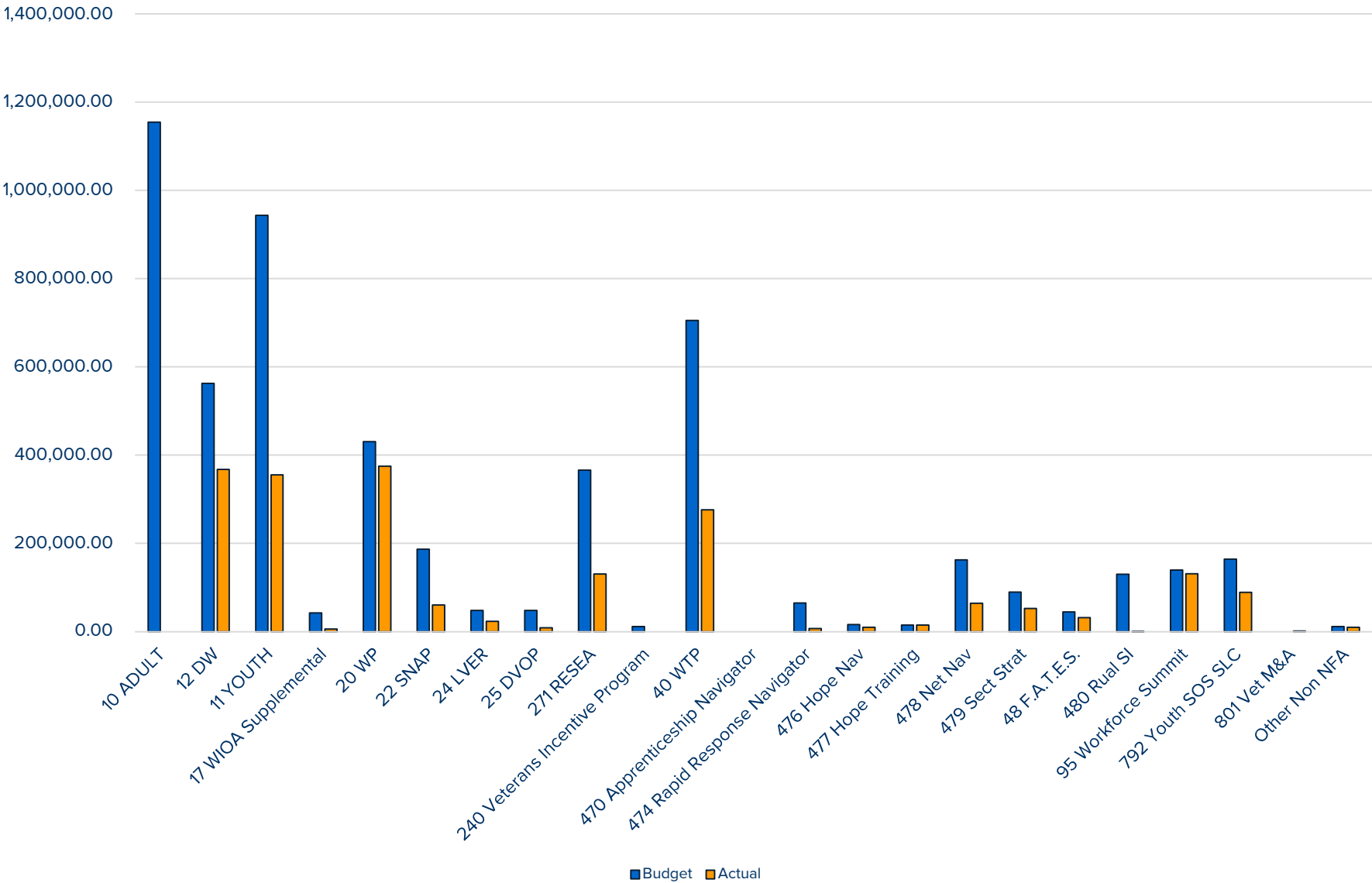
LWDB 20  
Summary of Funding and Expenditures  
As of November 30, 2025

PY 25-26 TOTAL AVAILABLE FUNDING	INDIRECT	10 ADULT	12 DW	11 YOUTH	17 WIOA Supplemental	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	240 Veterans Incentive Program	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	\$ 11,095	\$ 1,043,690	\$ 130,000	\$ 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	\$ 11,095	\$ 709,625	\$ 130,000	\$ 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	\$ 11,095	\$ 709,625	\$ 130,000	\$ 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	240 Veterans Incentive Program	40 WTP	470 Apprent Navigator	474 Rapid Response Navigator	476 Hope Navigator	477 Hope Training
PY 25-26 Allocations		\$ -	\$ -	\$ -	\$ -	\$ 39,990	\$ -	\$ 12,522	\$ 1,869	\$ -	\$ -	\$ 64,540	\$ -	\$ 8,000	\$ -	\$ -
PY 25-26 Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 26-27		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 24-25		\$ -	\$ 389,940	\$ 313,097	\$ 28,608	\$ 300,430	\$ 37,812	\$ 6,577	\$ 4,248	\$ 115,945	\$ -	\$ 211,255	\$ -	\$ -	\$ 9,686	\$ 14,620
Total DEO Grant Funding		\$ -	\$ 389,940	\$ 313,097	\$ 28,608	\$ 300,430	\$ 37,812	\$ 6,577	\$ 4,248	\$ 115,945	\$ -	\$ 211,255	\$ -	\$ 8,000	\$ 9,686	\$ 14,620
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 11,095	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL		\$ -	\$ 389,940	\$ 313,097	\$ 28,608	\$ 300,430	\$ 37,812	\$ 6,577	\$ 4,248	\$ 115,945	\$ 11,095	\$ 211,255	\$ -	\$ 8,000	\$ 9,686	\$ 14,620
% of Total Budgeted Funding Received		0.00%	69.23%	33.14%	68.03%	69.70%	20.13%	13.63%	8.84%	31.50%	100.00%	29.77%	0.00%	12.31%	61.18%	0.00%
EXPENDITURES																
Administrative	\$ -	\$ -	\$ 37,522	\$ 9,921	\$ 5,414	\$ 57,361	\$ 6,551	\$ 2,470	\$ 928	\$ 16,772	\$ -	\$ 36,019	\$ -	\$ 699	\$ 1,053	\$ 1,847
Salaries and Benefits	\$ 147,334	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 79,977	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (227,311)	\$ 66,366	\$ 4,725	\$ 9,921	\$ -	\$ 26,271	\$ 9,356	\$ 2,470	\$ 1,176	\$ 16,772	\$ -	\$ 36,019	\$ 114	\$ 939	\$ 2,476	\$ 5,057
Reclassification	\$ -	\$ (66,366)	\$ 32,797	\$ -	\$ 5,414	\$ 31,090	\$ (2,805)	\$ -	\$ (248)	\$ -	\$ -	\$ -	\$ (114)	\$ (240)	\$ (1,422)	\$ (3,210)
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ -	\$ 329,721	\$ 345,160	\$ -	\$ 317,112	\$ 53,415	\$ 20,452	\$ 7,461	\$ 113,389	\$ -	\$ 239,797	\$ -	\$ 6,344	\$ 8,633	\$ 12,773
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 289,192	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 90,965	\$ 209,455	\$ 13,253	\$ 9,594	\$ -	\$ 29,494	\$ 28,876	\$ 5,603	\$ 1,948	\$ 79,677	\$ -	\$ 109,802	\$ 435	\$ 4,919	\$ 12,892	\$ 19,094
Contract Labor	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 11,982	\$ -	\$ -	\$ -	\$ -	\$ 32,460	\$ -	\$ -	\$ -	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,375	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ 325	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 840	\$ -	\$ -	\$ -	\$ -
Support Services ITA	\$ -	\$ 11,161	\$ 2,011	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 326	\$ -	\$ -	\$ -	\$ 100
Training-ITA/OST/TAA	\$ -	\$ 61,946	\$ 7,410	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 30	\$ -	\$ -	\$ -	\$ 1,419
Training-OJT	\$ -	\$ 53,797	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,359
Training-Cust/Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 970	\$ 2,465	\$ 388	\$ 543	\$ -	\$ 260	\$ 354	\$ 2,845	\$ 2,020	\$ 1,028	\$ -	\$ 1,418	\$ -	\$ 18	\$ 86	\$ 109
One Stop Shared Costs	\$ 6,498	\$ 39,991	\$ 2,350	\$ 1,974	\$ -	\$ 23,271	\$ 7,755	\$ 9,978	\$ 3,956	\$ 17,312	\$ -	\$ 26,915	\$ 532	\$ 914	\$ 2,394	\$ 5,017
Other Operating Expenses	\$ 8,341	\$ 24,204	\$ 2,960	\$ 39,196	\$ -	\$ 110,963	\$ 9,475	\$ 866	\$ 706	\$ 7,494	\$ -	\$ 48,711	\$ 29	\$ 52	\$ 122	\$ 275
Allocated Program Indirect	\$ (106,775)	\$ 31,174	\$ 2,220	\$ 4,660	\$ -	\$ 12,340	\$ 4,395	\$ 1,160	\$ 552	\$ 7,878	\$ -	\$ 16,919	\$ 53	\$ 441	\$ 1,163	\$ 2,379
Reclassification	\$ -	\$ (434,517)	\$ 299,129	\$ -	\$ -	\$ 140,784	\$ (9,422)	\$ -	\$ (1,721)	\$ -	\$ -	\$ -	\$ (1,050)	\$ -	\$ (8,025)	\$ (20,980)
Total Expenditures	\$ 0	\$ -	\$ 367,243	\$ 355,080	\$ 5,414	\$ 374,473	\$ 59,965	\$ 22,922	\$ 8,389	\$ 130,161	\$ -	\$ 275,816	\$ -	\$ 7,043	\$ 9,686	\$ 14,620
Funding Over/(under) expenditures	\$ 0	\$ -	\$ 22,698	\$ (41,983)	\$ 23,194	\$ (74,043)	\$ (22,153)	\$ (16,345)	\$ (4,141)	\$ (14,216)	\$ 11,095	\$ (64,560)	\$ -	\$ 957	\$ -	\$ -
YTD % of Budgeted Funds Expended		0.00%	65.20%	37.59%	12.87%	86.88%	31.93%	47.51%	17.47%	35.36%	0.00%	38.87%	0.00%	10.84%	61.18%	0.00%

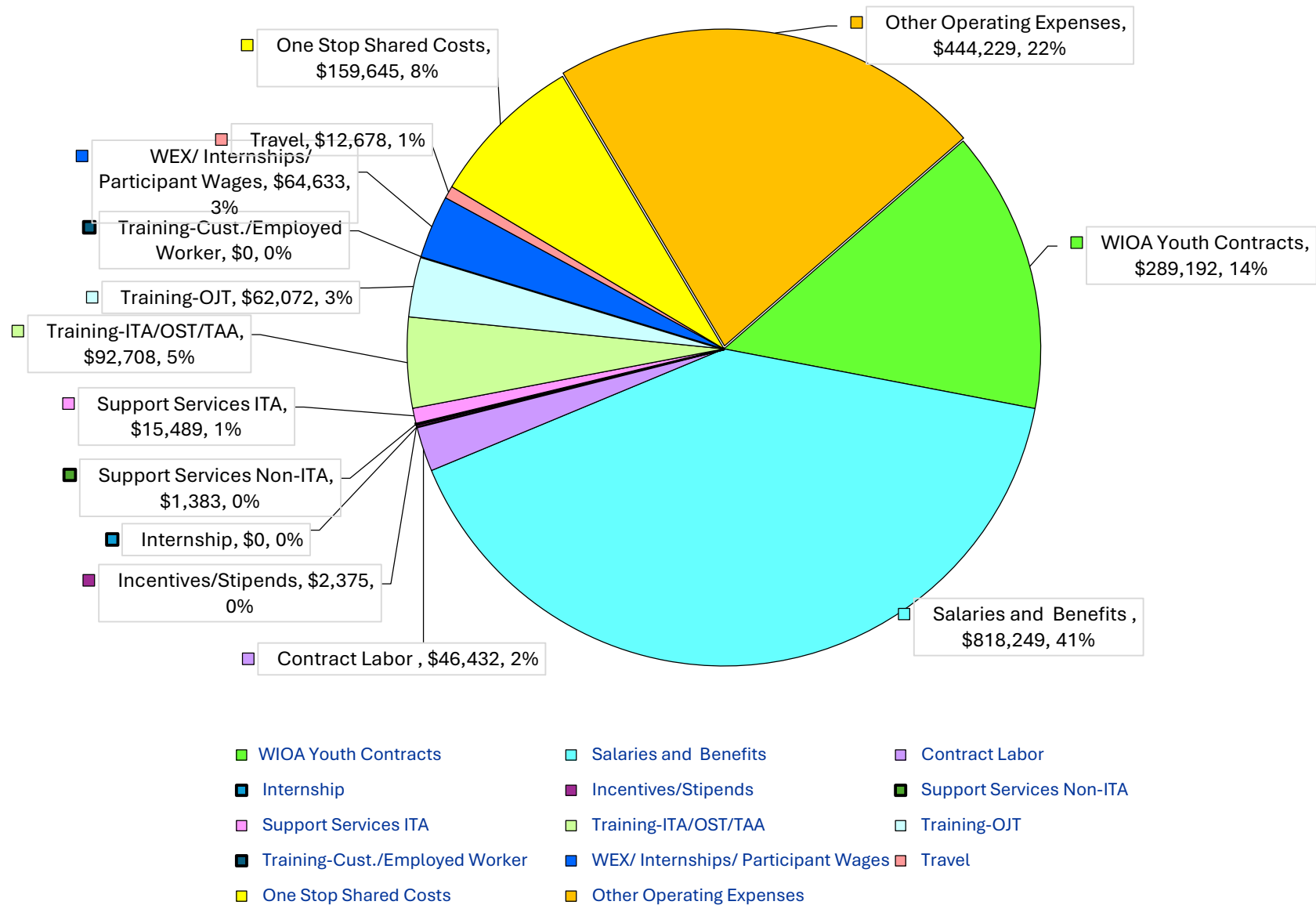
LWDB 20  
Summary of Funding and Expenditures  
As of November 30, 2025

PY 25-26 TOTAL AVAILABLE FUNDING	478 Network Navigators	479 Sectors of Strategic Focus	48 F.A.T.E.S.	480 Rual State Initiatives	792 Youth SOS SLC	801 VMA	95 Workforce Summit	Other Non NFA	YEAR TO DATE TOTALS			
PY 25-26 Allocations	\$ 163,571	\$ 90,000	\$ -	\$ 130,000	\$ -	\$ 3,091	\$ 140,000	\$ -		\$ 6,310,905		
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)	\$ 130,000	\$ -	\$ 3,091	\$ 140,000	\$ -		\$ 5,267,224		
OTHER NON DEO REVENUES	\$ -	\$ -	\$ 50,461	\$ -	\$ 165,000	\$ -	\$ -	\$ 11,547		\$ 227,008		
TOTAL	\$ 163,571	\$ 90,000	\$ 44,728	\$ 130,000	\$ 165,000	\$ 3,091	\$ 140,000	\$ 11,547	\$ -	\$ 5,494,231		
FUNDING DRAWN DOWN YTD	478 Network Navigators	479 Sectors of Strategic Focus	48 F.A.T.E.S.	480 Rual State Initiatives	792 Youth SOS SLC	801 VMA	95 Workforce Summit	Other Non NFA	PY 25-26 Actual	PY 25-26 Budget	VARIANCE	% Expended
PY 25-26 Allocations	\$ 98,700	\$ 58,000	\$ -	\$ 500	\$ -	\$ 1,124	\$ 128,000	\$ -	\$ 413,246	\$ 6,310,905	\$ 5,897,659	6.548%
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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,432,220	\$ 2,034,681	\$ 602,461	70.390%
Total DEO Grant Funding	\$ 98,700	\$ 58,000	\$ -	\$ 500	\$ -	\$ 1,124	\$ 128,000	\$ -	\$ 1,845,466	\$ 5,267,224	\$ 3,421,758	35.037%
OTHER NON DEO REVENUES	\$ -	\$ -	\$ 50,461	\$ -	\$ 109,287	\$ -	\$ -	\$ 5,206	\$ 176,049	\$ 227,008	\$ 50,959	77.552%
TOTAL	\$ 98,700	\$ 58,000	\$ 50,461	\$ 500	\$ 109,287	\$ 1,124	\$ 128,000	\$ 5,206	\$ 2,021,515	\$ 5,494,231	\$ 3,472,717	36.793%
% of Total Budgeted Funding Received	60.34%	64.44%	112.82%	0.00%	66.23%	0.00%	91.43%	45.08%	36.79%			
									PY 25-26 Actual	PY 25-26 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ 9,607	\$ 5,223	\$ 4,326	\$ 41	\$ 12,257	\$ -	\$ 18,038	\$ 1,263	\$ 227,311	\$ 548,372	\$ 321,062	41.45%
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 147,334	\$ 402,460	\$ 255,126	36.61%
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 79,977	\$ 145,912	\$ 65,935	54.81%
Allocated Indirect Costs	\$ 5,862	\$ 3,965	\$ 4,326	\$ 41	\$ 12,257	\$ -	\$ 18,038	\$ 1,160	\$ (0)	\$ (0)	\$ (0)	
Reclassification	\$ 3,745	\$ 1,258	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 103	\$ (0)	\$ -	\$ (0)	
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Program Training	\$ 54,277	\$ 47,224	\$ 27,134	\$ 271	\$ 76,737	\$ 1,124	\$ 112,682	\$ 8,069	\$ 1,781,774	\$ 4,784,310	\$ 3,002,535	37.2%
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 289,192	\$ 750,000	\$ 460,808	38.6%
Salaries and Benefits	\$ 30,534	\$ 18,108	\$ 1,024	\$ 223	\$ 3,382	\$ -	\$ -	\$ 1,637	\$ 670,915	\$ 2,261,011	\$ 1,590,096	29.7%
Contract Labor	\$ -	\$ -	\$ -	\$ -	\$ 1,991	\$ -	\$ -	\$ -	\$ 46,432	\$ 9,347	\$ (37,085)	496.8%
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,375	\$ 14,198	\$ 11,823	16.7%
Support Services Non-ITA	\$ -	\$ -	\$ 50	\$ -	\$ -	\$ -	\$ -	\$ 168	\$ 1,383	\$ 10,000	\$ 8,617	13.8%
Support Services ITA	\$ -	\$ -	\$ 1,891	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 15,489	\$ 54,895	\$ 39,406	28.2%
Training-ITA/OST/TAA	\$ -	\$ -	\$ 21,903	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 92,708	\$ 331,330	\$ 238,622	28.0%
Training-OJT	\$ -	\$ 2,916	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 62,072	\$ 320,746	\$ 258,673	19.4%
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ 64,633	\$ -	\$ -	\$ -	\$ 64,633	\$ 104,448	\$ 39,815	61.9%
Travel	\$ 62	\$ 99	\$ 4	\$ -	\$ -	\$ -	\$ -	\$ 8	\$ 12,678	\$ 16,190	\$ 3,512	78.3%
One Stop Shared Costs	\$ 5,784	\$ 3,066	\$ 215	\$ 29	\$ 189	\$ 1,124	\$ -	\$ 380	\$ 159,645	\$ 402,021	\$ 242,377	39.7%
Other Operating Expenses	\$ 320	\$ 245	\$ 16	\$ 0	\$ 786	\$ -	\$ 104,209	\$ 5,281	\$ 364,252	\$ 510,123	\$ 145,871	71.4%
Allocated Program Indirect	\$ 2,754	\$ 1,863	\$ 2,032	\$ 19	\$ 5,757	\$ -	\$ 8,473	\$ 541	\$ 0	\$ 0	\$ -	
Reclassification	\$ 14,823	\$ 20,927	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 52	\$ (0)	\$ -	\$ (0)	
Total Expenditures	\$ 63,884	\$ 52,447	\$ 31,459	\$ 312	\$ 88,994	\$ 1,124	\$ 130,720	\$ 9,332	\$ 2,009,085	\$ 5,332,678	\$ 3,323,593	37.7%
Funding Over/(under) expenditures	\$ 34,816	\$ 5,553	\$ 19,002	\$ 188	\$ 20,293	\$ -	\$ (2,720)	\$ (4,126)	\$ 12,430			
YTD % of Budgeted Funds Expended	39.06%	58.27%	70.33%	0.24%	53.94%	36.36%	93.37%	80.81%	36.57%			

Budget to Actual by Program



## PY 25-26 Expenditures by Category



Workforce Development Board of the Treasure Coast, Inc.  
Statement of Financial Position  
As of 11/30/2025

Assets

Current assets

Cash - Accounts Payable	5,671.90
Cash - Payroll	34,938.43
Cash - Business Checking W/Int.	429,221.75
Accounts Receivable Customers	111.03
Accounts Receivable - Other	545.48
Prepaid Expenses	23,522.44
Due TO/ Due FROM	2,585.91
Total Current assets	496,596.94

Non-current assets

Data Processing Equipment	119,215.39
Vehicles	447,386.10
Leasehold Improvements	217,855.62
Accumulated Depreciation	(724,716.63)
Other Assets	24,240.00
Total Non-current assets	83,980.48

Total Assets	<b><u>580,577.42</u></b>
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Liabilities & Net Assets

Current Liabilities

Accounts Payable	37,093.25
Payroll Accounts Payable	1,409.34
Accrued Expenses	120,399.49
Federal Withholding Tax	(0.01)
FICA Payable	0.60
SUTA Payable	47.10
Principal Insurance	286.94
Health Insurance Payable	1,990.35
AFLAC Payable	53.80
Legal Shield	96.84
Workers Comp Payable	5,944.22
Accrued Leave	80,222.32
Sick Leave Liability	44,265.49
Refundable Advances	1,935.77
Deferred Revenue	(1,116.25)
Total Current Liabilities	292,629.25

Non-current liabilities

Long-term Lease Liability	316,523.00
Lease Liability Offest	(316,523.00)
Total Non-current liabilities	0.00

Net Assets

Beginning of Year	1,032,582.20
Current Year	(744,634.03)
Total Net Assets	287,948.17
Total Liabilities & Net Assets	<b><u>580,577.42</u></b>

## AGENDA ITEM SUMMARY

<b>Title</b>	Financial Statements Audit June 30, 2025, and 2024
<b>Strategic Plans/Goals</b>	Optimal Use of Resources
<b>Policy/Plan/Law</b>	Workforce Innovation and Opportunity Act (WIOA)
<b>Action Requested</b>	Review and Approve Acceptance of the Final Financial Statements Audit June 30, 2025, and 2024, Amended Revisions
<b>Background</b>	<p>Each year, CSRC receives a draft audit report from its auditing firm, James Moore &amp; Company. The CSRC Board of Directors are required to officially review and accept the audit report. Our Administrative Plan requires that the Executive Committee review the report. After review by the Executive Committee, a representative of James Moore &amp; Company will present the FINAL audit of financial statements at the Board meeting on February 4, 2026.</p>
<b>Staff Recommendations</b>	Review and Approve Acceptance of the Amended Financial Statements Audit June 30, 2025, and 2024
<b>Supporting Material</b>	<p>Page 13 of the Audit Financial Statements June 30, 2025, and 2024, was updated for the omitted change in Lease Liability Interest Expense and change in Rent Expense. Totals were not affected.</p> <p>Link: <a href="#">G15 - FY25 Financial Statements (Workforce Development Board of the Treasure Coast, Inc. 2025 Audit [6/30/2025] (In Process))</a></p>
<b>Board Staff</b>	<p>Lisa Delligatti CFO <a href="mailto:ldelligatti@careersourcerc.com">ldelligatti@careersourcerc.com</a> (866) 482-4473 ext. 430</p>



## AGENDA ITEM SUMMARY

<b>Title</b>	Local Targeted Occupations List (LTOL) for 3rd Quarter of PY 2025-2026
<b>Strategic Goal</b>	Strong Advancement of Existing and Emerging Local Targeted Industry Clusters
<b>Policy/Plan/Law</b>	Workforce Innovation & Opportunity Act
<b>Action Required</b>	Review and Approve the LTOL for the 3rd Quarter of Program Year 2025-2026
<b>Background</b>	<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>
<b>Staff Recommendation</b>	Staff reviewed local labor market information and resources regarding the LTOL. Staff are recommending one addition to the LTOL for the 3rd Quarter. Staff recommends approval of this LTOL for the 3rd Quarter of PY 2025-2026.
<b>Supporting Materials</b>	CareerSource Research Coast Local Targeted Occupations List
<b>Board Staff</b>	<p>Tracey McMorris Vice President of Operations/COO <a href="mailto:tmcmorris@careersourcerc.com">tmcmorris@careersourcerc.com</a> (866) 482-4473 ext. 528</p>

## 2025-2026 Local Targeted Occupations List

Sorted by Occupational Title

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

**Selection Criteria:**

- 1 LMEC Educational Requirements: 3 (Some College, No Degree), 4 (Postsecondary Non-Degree Award), 5 (Associate Degree), or 6 (Bachelor's Degree)
- 2 30 annual openings and positive growth
- 3 Mean Wage of \$18.67/hour and Entry Wage of \$15.18/hour
- 4 High 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		
			% Growth	Annual Openings	2024 Hourly Wage		% 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	

# 2025-2026 Local Targeted Occupations List

Sorted by Occupational Title

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

## Selection Criteria:

- 1 LMEC Educational Requirements: 3 (Some College, No Degree), 4 (Postsecondary Non-Degree Award), 5 (Associate Degree), or 6 (Bachelor's Degree)
- 2 30 annual openings and positive growth
- 3 Mean Wage of \$18.67/hour and Entry Wage of \$15.18/hour
- 4 High 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 Training Code	In Targeted Industry?	Qualifying Level***
			Annual % Growth	Annual Openings	2024 Hourly Wage		Annual % Growth	Annual Openings	2024 Hourly Wage				
					Mean	Entry			Mean	Entry			
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
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

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Mean Wage of \$29.25/hour and Entry Wage of \$18.67/hour

SOC Code*	HSHW**	Occupation Title*	Regional				Statewide				LMEC		In	
			% Growth	Annual Openings	2024 Hourly Wage		% Growth	Annual Openings	2024 Hourly Wage		Training Code	Targeted Industry?	Qualifying Level***	
					Mean	Entry			Mean	Entry				
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	
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	
43-5031		Public Safety Telecommunicators	1.40	19	27.34	22.53	1.70	666	26.99	18.30	2	No	O	
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	

## 2025-2026 Local Targeted Occupations List

Sorted by Occupational Title

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

### Selection Criteria:

- 1 LMEC Educational Requirements: 3 (Some College, No Degree), 4 (Postsecondary Non-Degree Award), 5 (Associate Degree), or 6 (Bachelor's Degree)
- 2 30 annual openings and positive growth
- 3 Mean Wage of \$18.67/hour and Entry Wage of \$15.18/hour
- 4 High 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 Targeted Industry?	Qualifying Level***
			Annual % Growth	Annual Openings	2024 Hourly Wage		Annual % Growth	Annual Openings	2024 Hourly Wage				
					Mean	Entry			Mean	Entry			
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
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)



### REQUEST FOR ADDITION TO LOCAL TARGETED OCCUPATIONS LIST

Each occupation must meet the following:

- a. Positive Growth
- b. Entry Wage of \$15.18
- c. Mean Wage of \$18.67

To be considered High Skill/High Wage, occupations must meet the following:

- a. Entry Wage of \$18.67
- b. Mean Wage of \$29.25

Is this a critical occupation? Yes

Person completing this report: Dawn Riccardi

Please complete one form for each occupation you would like considered.

Occupation Title: Public Safety Telecommunicators

Occupation SOC Code: 43-5031.00

Employer Name, Address, and Phone	Number of Current Full-Time Employees in this Occupation	Average Hourly Wage for These Employees	Projected Openings
SLC Fire District 5160 Milner Drive, Fort Pierce	27	\$31.51	3
SLC BOCC 2300 VIRGINIA AVE, Fort Pierce	49	\$32.05	9
City of Vero Beach 1050 20th Street Vero Beach, FL 32960	10	\$23.50	2

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

Request for Addition to Local Targeted Occupations List – July 2025

## AGENDA ITEM SUMMARY

<b>Title</b>	Executive Staff Cost of Living Increase
<b>Strategic Plans/Goals</b>	Administration & Strategic
<b>Policy/Plan/Law</b>	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's/ DEO Grantee - Subgrantee Agreement
<b>Action Requested</b>	Review and approve the recommendation of a cost of living increase for the executive staff.
<b>Background</b>	<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 is asked to review and recommend cost of living increases for the Executive staff of 3%.</p> <ul style="list-style-type: none"> <li>• Brian Bauer</li> <li>• Tracey McMorris</li> <li>• Lisa Delligatti</li> </ul>
<b>Staff Recommendations</b>	Review and recommend cost of living increases for the Executive staff of 3%.
<b>Supporting Material</b>	None - Information
<b>Board Staff</b>	<p>Brian Bauer President/CEO <a href="mailto:bbauer@careersourcerc.com">bbauer@careersourcerc.com</a> (866) 482-4473 ext. 418</p>

## AGENDA ITEM SUMMARY

Title	President/CEO Annual Performance Evaluation
Strategic Plans/Goals	Administration and Strategic Planning
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's/DEO Grantee-Subgrantee Agreement /CSRC Employee Bonus Policy
Action Requested	Review and Accept the President/CEO Performance Evaluation
Background	<p>The Executive Committee members rate the performance of the President/CEO annually. The customary process is for an evaluation form to be e-mailed to Executive Committee members. Completed forms are to be returned to the Chairperson via e-mail. The Chairperson then tabulates the scores, presents the results to the Executive Committee, and discusses the results with the CEO.</p> <p>Per the DEO Grantee/Sub-Grantee Agreement, no changes to compensation for CSRC's executive staff are allowed without documented approval from the Board of Directors and must align with local policies and procedures.</p>
Staff Recommendations	<p>Review and accept the President/CEO Performance Evaluation and approve any annual performance bonus deemed appropriate.</p> <p>President/CEO Performance Evaluation - Composite Rating Form Link: <a href="https://careersourcerc.com/wp-content/uploads/2026/01/Combined_President_CEO_Performance_Evaluations_2-25_thru_2-26.pdf">https://careersourcerc.com/wp-content/uploads/2026/01/Combined_President_CEO_Performance_Evaluations_2-25_thru_2-26.pdf</a></p>
Board Staff	<p>Brian Bauer President/CEO <a href="mailto:bbauer@careersourcerc.com">bbauer@careersourcerc.com</a> (866) 482-4473 ext. 418</p>



CEO Evaluation Tabulation

2/6/2025 - 2/5/2026

Committee Member	I. Organization, Efficiency, Productivity and Effectiveness						II. Individual Efficiency, Productivity and Effectiveness						
Performance Category	Leadership	Planning	Organizing	Work Products	Budget Management	Staffing	Problem Analysis/ Decision Making	Presentations	Self-Direction	Self-Motivation	Communication Skills	Community Relations	Board Interaction
Committee Member - 1	4	4	4	4	4	4	4	4	4	4	4	4	4
Committee Member - 2	3	4	4	4	4	4	4	4	3	3	4	3	4
Committee Member - 3	4	4	4	3	3	4	4	3	4	4	3	3	3
Committee Member - 4	4	4	4	3	3	4	4	3	4	4	3	3	3
Committee Member - 5	3	4	3	4	4	3	4	4	3	3	3	3	3
Committee Member - 6	4	4	4	4	4	4	4	4	4	4	4	4	3
Total													
Average Grade	3.67	4.00	3.83	3.67	3.67	3.83	4.00	3.67	3.67	3.67	3.50	3.33	4.00

Combined Average	3.73
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Signed by:

Jim Brann

6A851A7A8DEB4AA

Chair of the Board

12/21/2025 | 9:20 AM EST

Date

This performance evaluation has been reviewed and discussed with me.

Brian Bauer, President/CEO

Date

Jim Brann, Chair of the Board

Date

# Agenda Item 9

## AGENDA ITEM SUMMARY

Title	LWDB 20 Primary Indicators of Performance for Program Year (PY) 2025-2026 1st 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	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) will negotiate and reach agreements with the Local Workforce Development Boards regarding their local performance targets.
Staff Recommendations	Staff will review performance for the 1st quarter of PY2025- 2026
Supporting Material	LWDB 20 PY2025-2026 1st Quarter Performance
Board Staff	Brian Bauer President/CEO <a href="mailto:bbauer@careersourcerc.com">bbauer@careersourcerc.com</a> (866) 482-4473 ext. 418

A	B	C	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR	AS
		Measures	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	PY2025-2026 1st Quarter Performance	PY2025-2026 % of Performance Goal Met For Q1	PY2025-2026 Performance Goals									
		<b>Adults:</b>																				
		Employed 2nd Qtr After Exit	104.61	97.1	104.07	94.6	101.39	93	99.68	93.3	91.9	98.50	93.3									
		Median Wage 2nd Quarter After Exit	137.43	\$14,129	142.92	\$14,963	151.35	\$14,341	145.06	\$9,886	\$14,879	150.51	\$9,886									
		Employed 4th Qtr After Exit	101.65	93.3	102.41	94	103.18	92.2	101.21	91.1	92.9	101.98	91.1									
		Credential Attainment Rate	111.44	94.1	109.80	92.5	107.93	89.4	104.32	85.7	89.7	104.67	85.7									
		Measurable Skill Gains	108.57	89.9	126.26	86.9	122.05	99.3	139.47	71.2	85.9	120.65	71.2									
		<b>Dislocated Workers:</b>																				
		Employed 2nd Qtr After Exit	108.70	100	108.70	88.9	96.63	88.9	96.63	92	87.5	95.11	92									
		Median Wage 2nd Quarter After Exit	113.83	\$9,946	99.46	\$10,113	101.13	\$9,661	96.61	\$10,000	\$7,772	75.82	\$10,250									
		Employed 4th Qtr After Exit	109.89	100	109.89	100	109.89	100	109.89	91	88.9	97.69	91									
		Credential Attainment Rate	112.11	100	112.11	100	112.11	100	112.11	89.2	100	112.11	89.2									
		Measurable Skill Gains	113.77	88.9	111.26	75	93.87	100	125.16	79.9	100	125.16	79.9									
		<b>Youth:</b>																				
		Employed 2nd Qtr After Exit	111.66	90.5	112.28	91.2	113.15	87	107.94	80.6	80.8	100.25	80.6									
		Median Wage 2nd Quarter After Exit	129.24	\$4,802	137.20	\$4,909	140.26	\$4,565	130.41	\$3,500	\$4,608	121.26	\$3,800									
		Employed 4th Qtr After Exit	123.97	90.9	124.52	93.3	127.81	93.7	128.36	73	92.6	126.85	73									
		Credential Attainment Rate	92.18	87.2	98.87	88.4	100.23	88.4	100.23	88.2	79.1	87.79	90.1									
		Measurable Skill Gains	104.40	90.2	104.52	96.3	111.59	98.6	114.25	86.3	93.5	108.34	86.3									
		<b>Wagner Peyser:</b>																				
		Employed 2nd Qtr After Exit	97.89	65.5	98.79	65	98.04	64.2	96.83	66.3	63.4	95.63	66.3									
		Median Wage 2nd Quarter After Exit	136.01	\$7,716	122.57	\$7,862	124.89	\$7,800	123.91	\$6,295	\$7,670	121.84	\$6,295									
		Employed 4th Qtr After Exit	100.64	62.5	100.64	63.8	102.74	64	103.06	62.1	64.1	103.22	62.1									
		Not Met (less than 90% of negotiated)																				
		Met (90-100% of negotiated)																				
		Exceeded (greater than 100% of negotiated)																				

## AGENDA ITEM SUMMARY

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

# Agenda Item 11

## AGENDA ITEM SUMMARY

Title	CareerSource Research Coast (CSRC) Updates
Strategic Plans/Goals	Strategic Planning, Commitments, and Projects
Policy/Plan/Law	Workforce Development Board of the Treasure Coast By-Laws
Action Requested	None - Information only
Background	<p>The primary functions of the Executive Committee shall be to coordinate workforce development activities with regional economic development strategies and increase accountability by assuring that education and workforce development activities in the area are effective and relevant to current and future labor market needs.</p> <p>Staff will provide updates on CSRC programs and current initiatives to the Executive Committee Members.</p>
Staff Recommendations	None - Information Only
Supporting Material	None - Information Only
Board Staff	Brian Bauer President/CEO <a href="mailto:bbauer@careersourcerc.com">bbauer@careersourcerc.com</a> (866) 482-4473 ext. 418