



Board of Directors

MEETING AGENDA

Meeting Details

Date: April 29, 2026

Time: 8:00 am

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

MSTeams Virtual Meeting Access:

Access Code: 713 674 859#

Phone: 772-800-5467

URL:

<https://teams.microsoft.com/meet/244441591256801?p=M7db8yUpfMMn57bUZh>

Opening Remarks

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

Voting Items

5. Review and Approve Monthly Financial Reports - February and March 2026 (Pages 7-17)
6. Consent Agenda (Page 18)
 - a. Review and Approve February 4, 2026, Board of Directors Meeting Minutes (Pages 19-27)
 - b. Review and Approve February 25, 2026, Program and Services Meeting Minutes (Pages 28-31)
 - c. Review and Approve April 21, 2026, Youth Council Meeting Minutes (Pages 32-35)
 - d. Review and Approve March 13, 2026, Executive Committee Meeting Minutes (Pages 36-44)
 - i. Review and Approve Financial Statements for December 2025, January 2026 (Pages 45-54)
 - ii. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Youth Program Eligibility and Service Provider Selection Policy (55-57)
 - iii. Review and Approve Workforce Innovation and Opportunity Act (WOA) - On-the-Job Training Program Policy Revisions (Pages 58-69)
 - iv. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Business Engagement and Economic Development Support Policy (Pages 70-72)
 - v. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Emergency Response and Disaster Recovery Policy (Pages 73-83)
7. Review and Approve PY2025-26 4th Quarter Local Targeted Occupations List (LTOL) (Pages 84-88)

8. Review and Approve Application for Subsequent Local Workforce Development Area (LWDA) Designation - Program Years 2026 and 2027 (Pages 89-100)
9. Review and Approve Board/Committee Schedule - PY2026-2027 (Pages 101-102)
10. Review and Approve CSRC Paid Holidays & Compressed Work Schedule for PY 2026 2027 (Pages 103-104)
11. Review and Approve RFP #26-001-YWS Youth Workforce Services Sub-Recipient Recommendation (Pages 105-106)
12. Review and Approve Board Member CSF Contract/COI Exemption Requests - PY 2026-2027 (Pages 107-156)

Information/Discussion

13. One-Stop Operator Report - 3rd Quarter (Pages 157-162)
14. Workforce Readiness Taskforce Report - 1st Quarter (Page 163)
15. Chair's Report (Page 164)
 - a. Ad Hoc Search - Board Membership Update
 - Nomination for Appointments to the Workforce Development Board of the Treasure Coast:
 - Brian Cartland, VP, Economic Development, IRC Economic Development
 - Sharon Wright, Area 3 Director, Florida Division of Vocational Rehabilitation
 - Wes McCurry, President, Economic Development Council of SLC
 - Open Seats – Business - Replacement for David Bean and Werner Bols
16. President's Report (Page 165)
 - a. CareerSource Research Coast (CSRC) Update
 - i. Local Workforce Development Membership Composition and Certification (Pages 166-169)
 - ii. Primary Indicators of Performance-2nd Quarter PY 2025-2026 (Pages 170-171)
 - iii. Letter Grade Performance Update-2nd Quarter PY 2025-2026 (Page 172)
 - iv. Office Closure: Combined Open Enrollment and Staff Training Day (173)
17. Open to the Public (Page 174)
18. Open to the Board (Page 175)
19. Adjournment - Next Board of Directors Meeting - June 24, 2026

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

#	BOARD MEMBER		09/24	02/04	04/29	06/24	Total
1	Werner	Bols	T	E			
2	Jim	Brann - Chair	T	X			
3	Pamela	Burchell	E	E			
4	Jose	Capellan	T	T			
5	Joseph	Catrambone	E	E			
6	Bob	Cenk	E	T			
7	Erin	Lowry * As of 12-1-2025	T	E			
8	David	Freeland	E	E			
9	Jon Aliesha	Prince Seitz (Designee)	T	X			
10	Mike	Kauffmann	E	T			
11	Leslie	Kristof - Past Chair	E	T			
12	Michael Tracey	Maine Miller (Designee)	X	E			
13	Dr. Tim Angela	Moore Browning (Designee)	X	T			
14	Terrance	Moore	X	T			
15	Dr. David Christie	Moore Shields (Designee) Treasurer	T	T			
16	Wayne	Olson *Resigned as of 10-6-25	E	N/A			
17	Lorna	Landherr	T	T			
18	Will	Armstead - Vice Chair	X	T			
19	Kevin	Staten	E	E			
20	Kelly	Johnson	E	X			
21	Deb	Frazier	X	E			
#	ADMINISTRATIVE STAFF		09/24	02/04	04/29	06/24	Total
1	Brian	Bauer	X	X			
2	Tracey	McMorris	X	X			
3	Lisa	Delligatti	X	X			
4	Christina	Coble	X	X			
5	IT	M. Rivera/Luis Bello	X	X			
6	Jennifer	Eimann	X	X			

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

AGENDA ITEM SUMMARY

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

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 5

AGENDA ITEM SUMMARY

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

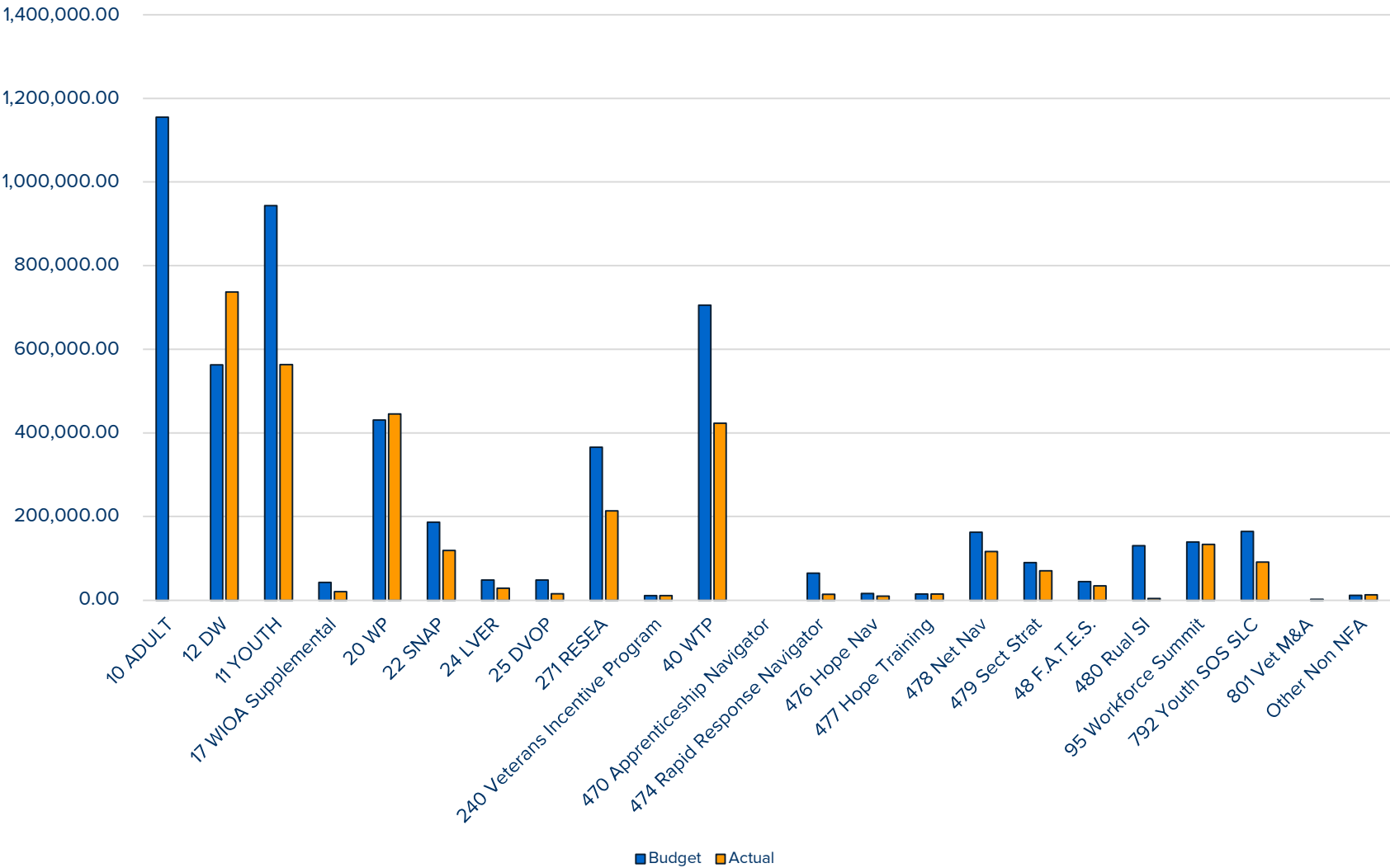
LWDB 20
Summary of Funding and Expenditures
As of February 28, 2026

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	\$ 943,690	\$ 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	\$ 609,625	\$ 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	\$ 609,625	\$ 130,000	\$ 65,000	\$ 15,831	\$ 14,620
FUNDING DRAWN DOWN YTD																
FUNDING DRAWN DOWN YTD	INDIRECT	10 ADULT	12 DW	11 YOUTH	17 WIOA Supplemental	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	240 Veterans Incentive Program	40 WTP	470 Apprent Navigator	474 Rapid Response Navigator	476 Hope Navigator	477 Hope Training
PY 25-26 Allocations		\$ -	\$ -	\$ 191,821	\$ -	\$ 121,990	\$ 53,756	\$ 22,968	\$ 11,075	\$ 102,947	\$ -	\$ 331,923	\$ -	\$ 15,500	\$ -	\$ -
PY 25-26 Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 26-27		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 24-25		\$ -	\$ 820,940	\$ 322,276	\$ 28,608	\$ 300,430	\$ 37,812	\$ 6,577	\$ 4,248	\$ 106,698	\$ -	\$ 125,198	\$ -	\$ -	\$ 9,686	\$ 14,620
Total DEO Grant Funding		\$ -	\$ 820,940	\$ 514,097	\$ 28,608	\$ 422,420	\$ 91,568	\$ 29,545	\$ 15,324	\$ 209,645	\$ -	\$ 457,121	\$ -	\$ 15,500	\$ 9,686	\$ 14,620
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 11,095	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ -	\$ 820,940	\$ 514,097	\$ 28,608	\$ 422,420	\$ 91,568	\$ 29,545	\$ 15,324	\$ 209,645	\$ 11,095	\$ 457,121	\$ -	\$ 15,500	\$ 9,686	\$ 14,620	
% of Total Budgeted Funding Received		0.00%	145.76%	54.42%	68.03%	98.01%	48.76%	61.24%	31.90%	56.95%	100.00%	74.98%	0.00%	23.85%	61.18%	0.00%
EXPENDITURES																
Administrative	\$ -	\$ -	\$ 83,427	\$ 12,874	\$ (16,059)	\$ 102,687	\$ 13,222	\$ 3,188	\$ 1,674	\$ 28,985	\$ 528	\$ 57,845	\$ -	\$ 1,496	\$ 1,053	\$ 1,847
Salaries and Benefits	\$ 255,279	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 103,188	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (358,467)	\$ 126,289	\$ 7,208	\$ 12,874	\$ -	\$ 30,870	\$ 16,668	\$ 3,188	\$ 2,001	\$ 28,985	\$ 1,791	\$ 57,845	\$ 121	\$ 2,016	\$ 2,642	\$ 5,390
Reclassification	\$ -	\$ (126,289)	\$ 76,220	\$ -	\$ (16,059)	\$ 71,817	\$ (3,445)	\$ -	\$ (327)	\$ -	\$ (1,264)	\$ -	\$ (121)	\$ (520)	\$ (1,588)	\$ (3,543)
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ (0)	\$ -	\$ 653,196	\$ 550,382	\$ 36,293	\$ 342,654	\$ 105,786	\$ 25,503	\$ 13,727	\$ 184,498	\$ 10,567	\$ 365,156	\$ -	\$ 12,766	\$ 8,633	\$ 12,773
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 470,273	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 159,333	\$ 381,710	\$ 19,184	\$ 14,181	\$ -	\$ 36,324	\$ 59,012	\$ 6,817	\$ 3,650	\$ 135,815	\$ -	\$ 202,683	\$ 435	\$ 10,138	\$ 12,892	\$ 19,094
Contract Labor	\$ -	\$ 10,094	\$ -	\$ -	\$ -	\$ -	\$ 14,966	\$ -	\$ -	\$ -	\$ -	\$ 35,931	\$ -	\$ -	\$ -	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,850	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ 475	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,090	\$ -	\$ -	\$ -	\$ -
Support Services ITA	\$ -	\$ 15,727	\$ 2,411	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 326	\$ -	\$ -	\$ -	\$ 100
Training-ITA/OST/TAA	\$ -	\$ 91,164	\$ 12,233	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 30	\$ -	\$ -	\$ -	\$ 1,419
Training-OJT	\$ -	\$ 124,905	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,359
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 1,540	\$ 2,976	\$ 426	\$ 553	\$ -	\$ 271	\$ 456	\$ 3,051	\$ 2,023	\$ 1,144	\$ -	\$ 1,738	\$ -	\$ 28	\$ 86	\$ 109
One Stop Shared Costs	\$ 10,365	\$ 60,841	\$ 3,035	\$ 2,472	\$ -	\$ 33,150	\$ 11,840	\$ 13,035	\$ 8,707	\$ 24,418	\$ -	\$ 38,156	\$ 532	\$ 1,505	\$ 2,394	\$ 5,017
Other Operating Expenses	\$ 13,735	\$ 27,598	\$ 3,213	\$ 56,260	\$ -	\$ 115,376	\$ 10,911	\$ 955	\$ 857	\$ 8,164	\$ 9,698	\$ 52,503	\$ 29	\$ 56	\$ 122	\$ 275
Allocated Program Indirect	\$ (184,973)	\$ 65,166	\$ 3,719	\$ 6,643	\$ -	\$ 15,929	\$ 8,601	\$ 1,645	\$ 1,032	\$ 14,957	\$ 924	\$ 29,849	\$ 63	\$ 1,040	\$ 1,363	\$ 2,780
Reclassification	\$ -	\$ (780,657)	\$ 608,975	\$ -	\$ 36,293	\$ 141,605	\$ -	\$ -	\$ (2,542)	\$ -	\$ (55)	\$ -	\$ (1,059)	\$ -	\$ (8,225)	\$ (21,381)
Total Expenditures	\$ 0	\$ -	\$ 736,623	\$ 563,255	\$ 20,234	\$ 445,341	\$ 119,008	\$ 28,690	\$ 15,401	\$ 213,483	\$ 11,095	\$ 423,001	\$ -	\$ 14,263	\$ 9,686	\$ 14,620
Funding Over/(under) expenditures	\$ 0	\$ -	\$ 84,318	\$ (49,158)	\$ 8,374	\$ (22,921)	\$ (27,440)	\$ 855	\$ (77)	\$ (3,838)	\$ -	\$ 34,119	\$ -	\$ 1,238	\$ -	\$ -
YTD % of Budgeted Funds Expended		0.00%	130.79%	59.63%	48.12%	103.32%	63.37%	59.47%	32.07%	57.99%	100.00%	69.39%	0.00%	21.94%	61.18%	0.00%

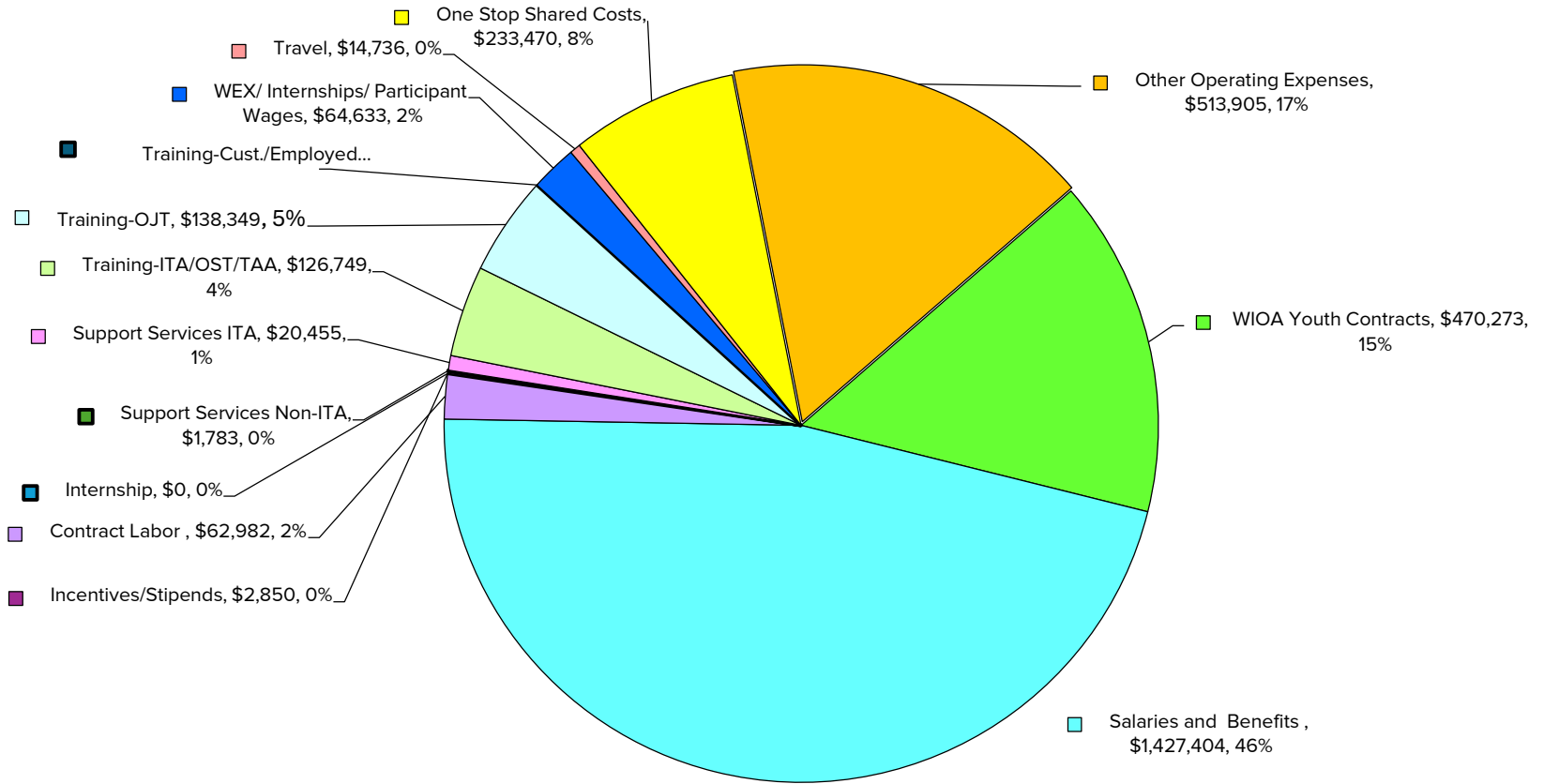
LWDB 20
Summary of Funding and Expenditures
As of February 28, 2026

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	\$ -		\$ 6,210,905			
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	\$ -		\$ 5,167,224			
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	\$ -	\$ 5,394,231			
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	\$ 123,200	\$ 90,000	\$ -	\$ 3,750	\$ -	\$ 1,967	\$ 131,725	\$ -	\$ 1,202,623	\$ 6,210,905	\$ 5,008,283	19.363%	
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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,777,094	\$ 2,034,681	\$ 257,587	87.340%	
Total DEO Grant Funding	\$ 123,200	\$ 90,000	\$ -	\$ 3,750	\$ -	\$ 1,967	\$ 131,725	\$ -	\$ 2,979,717	\$ 5,167,224	\$ 2,187,508	57.666%	
OTHER NON DEO REVENUES	\$ -	\$ -	\$ 50,461	\$ -	\$ 80,651	\$ -	\$ -	\$ 5,804	\$ 148,012	\$ 227,008	\$ 78,996	65.201%	
TOTAL	\$ 123,200	\$ 90,000	\$ 50,461	\$ 3,750	\$ 80,651	\$ 1,967	\$ 131,725	\$ 5,804	\$ 3,127,729	\$ 5,394,231	\$ 2,266,503	57.983%	
% of Total Budgeted Funding Received	75.32%	100.00%	112.82%	0.00%	48.88%	0.00%	94.09%	50.27%	57.98%				
EXPENDITURES										PY 25-26 Actual	PY 25-26 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ 18,021	\$ 7,276	\$ 4,875	\$ 374	\$ 13,080	\$ -	\$ 19,248	\$ 2,826	\$ 358,467	\$ 548,372	\$ 189,905	65.37%	
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 255,279	\$ 402,460	\$ 147,180	63.43%	
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 103,188	\$ 145,912	\$ 42,724	70.72%	
Allocated Indirect Costs	\$ 14,682	\$ 6,686	\$ 4,875	\$ 550	\$ 13,080	\$ -	\$ 19,248	\$ 1,459	\$ 0	\$ (0)	\$ (0)		
Reclassification	\$ 3,339	\$ 590	\$ -	\$ (175)	\$ -	\$ -	\$ -	\$ 1,366	\$ (0)	\$ -	\$ (0)		
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Program Training	\$ 98,300	\$ 63,002	\$ 29,100	\$ 3,347	\$ 77,729	\$ 1,967	\$ 114,142	\$ 9,600	\$ 2,719,121	\$ 4,784,310	\$ 2,065,188	56.8%	
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 470,273	\$ 750,000	\$ 279,727	62.7%	
Salaries and Benefits	\$ 73,755	\$ 25,785	\$ 2,363	\$ 2,911	\$ 3,382	\$ -	\$ -	\$ 2,661	\$ 1,172,125	\$ 2,261,011	\$ 1,088,886	51.8%	
Contract Labor	\$ -	\$ -	\$ -	\$ -	\$ 1,991	\$ -	\$ -	\$ -	\$ 62,982	\$ 9,347	\$ (53,635)	673.8%	
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,850	\$ 14,198	\$ 11,348	20.1%	
Support Services Non-ITA	\$ -	\$ -	\$ 50	\$ -	\$ -	\$ -	\$ -	\$ 168	\$ 1,783	\$ 10,000	\$ 8,217	17.8%	
Support Services ITA	\$ -	\$ -	\$ 1,891	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 20,455	\$ 54,895	\$ 34,440	37.3%	
Training-ITA/OST/TAA	\$ -	\$ -	\$ 21,903	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 126,749	\$ 331,330	\$ 204,581	38.3%	
Training-OJT	\$ -	\$ 8,084	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 138,349	\$ 320,746	\$ 182,397	43.1%	
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 64,633	\$ -	\$ -	\$ 64,633	\$ 104,448	\$ 39,815	61.9%	
Travel	\$ 206	\$ 115	\$ 6	\$ 2	\$ -	\$ -	\$ -	\$ 8	\$ 14,736	\$ 16,190	\$ 1,454	91.0%	
One Stop Shared Costs	\$ 10,800	\$ 3,988	\$ 355	\$ 150	\$ 189	\$ 1,967	\$ -	\$ 553	\$ 233,470	\$ 402,021	\$ 168,551	58.1%	
Other Operating Expenses	\$ 353	\$ 251	\$ 16	\$ 1	\$ 786	\$ -	\$ 104,209	\$ 5,348	\$ 410,717	\$ 510,123	\$ 99,406	80.5%	
Allocated Program Indirect	\$ 7,576	\$ 3,450	\$ 2,515	\$ 284	\$ 6,749	\$ -	\$ 9,932	\$ 754	\$ (0)	\$ 0	\$ -		
Reclassification	\$ 5,610	\$ 21,328	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 107	\$ 0	\$ -	\$ 0		
Total Expenditures	\$ 116,321	\$ 70,279	\$ 33,975	\$ 3,722	\$ 90,809	\$ 1,967	\$ 133,390	\$ 12,425	\$ 3,077,588	\$ 5,332,678	\$ 2,255,090	57.7%	
Funding Over/(under) expenditures	\$ 6,879	\$ 19,721	\$ 16,486	\$ 28	\$ (10,157)	\$ -	\$ (1,665)	\$ (6,621)	\$ 50,140				
YTD % of Budgeted Funds Expended	71.11%	78.09%	75.96%	2.86%	55.04%	63.64%	95.28%	107.61%	57.05%				

Budget to Actual by Program



PY 25-26 Expenditures by Category



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

Workforce Development Board of the Treasure Coast, Inc.
Statement of Financial Position
As of 2/28/2026

Assets

Current assets

Cash - Accounts Payable	4,753.50
Cash - Payroll	34,627.69
Cash - Business Checking W/Int.	408,949.69
Accounts Receivable Customers	273.85
Accounts Receivable - Other	1,566.83
Prepaid Expenses	20,964.34
Due TO/ Due FROM	2,304.91

Total Current assets 473,440.81

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 557,421.29

Liabilities & Net Assets

Current Liabilities

Accounts Payable	17,722.79
Accrued Expenses	74,969.98
Federal Withholding Tax	(0.01)
FICA Payable	0.60
SUTA Payable	1,043.69
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	3,230.00

Total Current Liabilities 231,762.78

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	(706,923.69)
Total Net Assets	325,658.51

Total Liabilities & Net Assets 557,421.29

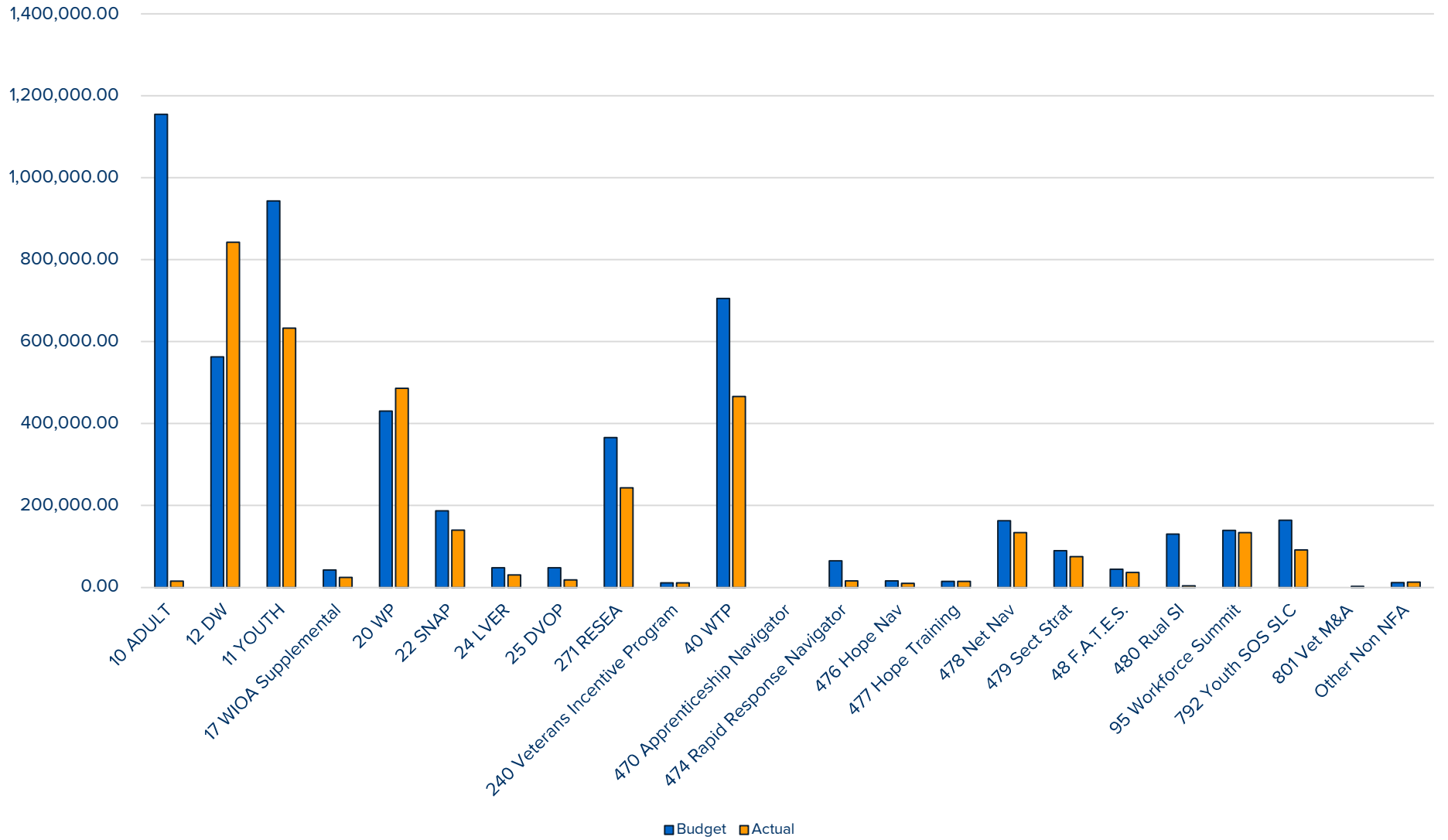
LWDB 20
Summary of Funding and Expenditures
As of March 31, 2026

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	\$ 943,690	\$ 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	\$ 609,625	\$ 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	\$ 609,625	\$ 130,000	\$ 65,000	\$ 15,831	\$ 14,620
FUNDING DRAWN DOWN YTD																
FUNDING DRAWN DOWN YTD	INDIRECT	10 ADULT	12 DW	11 YOUTH	17 WIOA Supplemental	20 WP	22 SNAP	24 LVER	25 DVOP	271 RESEA	240 Veterans Incentive Program	40 WTP	470 Apprent Navigator	474 Rapid Response Navigator	476 Hope Navigator	477 Hope Training
PY 25-26 Allocations		\$ -	\$ -	\$ 195,721	\$ -	\$ 153,990	\$ 91,156	\$ 23,118	\$ 13,175	\$ 124,200	\$ -	\$ 365,023	\$ -	\$ 16,000	\$ -	\$ -
PY 25-26 Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 26-27		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 24-25		\$ -	\$ 835,940	\$ 322,276	\$ 28,608	\$ 300,430	\$ 37,812	\$ 6,577	\$ 4,248	\$ 106,698	\$ -	\$ 125,198	\$ -	\$ -	\$ 9,686	\$ 14,620
Total DEO Grant Funding		\$ -	\$ 835,940	\$ 517,997	\$ 28,608	\$ 454,420	\$ 128,968	\$ 29,695	\$ 17,424	\$ 230,898	\$ -	\$ 490,221	\$ -	\$ 16,000	\$ 9,686	\$ 14,620
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 11,095	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ -	\$ 835,940	\$ 517,997	\$ 28,608	\$ 454,420	\$ 128,968	\$ 29,695	\$ 17,424	\$ 230,898	\$ 11,095	\$ 490,221	\$ -	\$ 16,000	\$ 9,686	\$ 14,620	
% of Total Budgeted Funding Received		0.00%	148.42%	54.84%	68.03%	105.43%	68.67%	61.55%	36.28%	62.72%	100.00%	80.41%	0.00%	24.62%	61.18%	0.00%
EXPENDITURES																
Administrative	\$ -	\$ 15,005	\$ 104,363	\$ 13,856	\$ (19,523)	\$ 89,096	\$ 15,666	\$ 3,315	\$ 1,893	\$ 32,357	\$ 528	\$ 62,368	\$ -	\$ 1,692	\$ 1,053	\$ 1,847
Salaries and Benefits	\$ 279,512	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 11,747	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (391,259)	\$ 144,036	\$ 7,285	\$ 13,856	\$ -	\$ 32,036	\$ 19,111	\$ 3,315	\$ 2,220	\$ 32,357	\$ 1,759	\$ 62,368	\$ 119	\$ 2,212	\$ 2,594	\$ 5,294
Reclassification	\$ -	\$ (129,032)	\$ 97,078	\$ -	\$ (19,523)	\$ 57,060	\$ (3,445)	\$ -	\$ (327)	\$ -	\$ (1,231)	\$ -	\$ (119)	\$ (520)	\$ (1,541)	\$ (3,447)
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ -	\$ 738,003	\$ 618,945	\$ 43,814	\$ 396,487	\$ 124,239	\$ 27,209	\$ 16,284	\$ 210,767	\$ 10,567	\$ 403,411	\$ -	\$ 14,331	\$ 8,633	\$ 12,773
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 527,317	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 186,452	\$ 430,660	\$ 19,916	\$ 15,563	\$ -	\$ 38,129	\$ 71,406	\$ 6,919	\$ 3,855	\$ 153,568	\$ -	\$ 226,920	\$ 435	\$ 11,311	\$ 12,892	\$ 19,094
Contract Labor	\$ -	\$ 19,351	\$ 183	\$ -	\$ -	\$ -	\$ 14,966	\$ -	\$ -	\$ -	\$ -	\$ 35,931	\$ -	\$ -	\$ -	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,275	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ 475	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,240	\$ -	\$ -	\$ -	\$ -
Support Services ITA	\$ -	\$ 17,699	\$ 2,411	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 326	\$ -	\$ -	\$ -	\$ 100
Training-ITA/OST/TAA	\$ -	\$ 105,275	\$ 12,233	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 30	\$ -	\$ -	\$ -	\$ 1,419
Training-OJT	\$ -	\$ 147,529	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,359
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 1,540	\$ 3,060	\$ 427	\$ 554	\$ -	\$ 271	\$ 477	\$ 3,197	\$ 2,023	\$ 1,174	\$ -	\$ 1,779	\$ -	\$ 31	\$ 86	\$ 109
One Stop Shared Costs	\$ 10,559	\$ 69,152	\$ 3,169	\$ 2,589	\$ -	\$ 36,821	\$ 13,775	\$ 13,926	\$ 10,489	\$ 27,274	\$ -	\$ 41,969	\$ 532	\$ 1,678	\$ 2,394	\$ 5,017
Other Operating Expenses	\$ 19,759	\$ 37,973	\$ 3,390	\$ 65,191	\$ -	\$ 121,471	\$ 12,952	\$ 1,317	\$ 1,221	\$ 10,696	\$ 9,698	\$ 57,142	\$ 29	\$ 75	\$ 122	\$ 275
Allocated Program Indirect	\$ (218,310)	\$ 80,367	\$ 4,065	\$ 7,731	\$ -	\$ 17,875	\$ 10,663	\$ 1,850	\$ 1,239	\$ 18,054	\$ 981	\$ 34,799	\$ 67	\$ 1,234	\$ 1,447	\$ 2,949
Reclassification	\$ -	\$ (911,542)	\$ 692,210	\$ -	\$ 43,814	\$ 181,920	\$ -	\$ -	\$ (2,542)	\$ -	\$ (112)	\$ -	\$ (1,063)	\$ -	\$ (8,309)	\$ (21,549)
Total Expenditures	\$ 0	\$ 15,005	\$ 842,366	\$ 632,801	\$ 24,291	\$ 485,583	\$ 139,905	\$ 30,524	\$ 18,177	\$ 243,124	\$ 11,095	\$ 465,779	\$ -	\$ 16,022	\$ 9,686	\$ 14,620
Funding Over/(under) expenditures	\$ 0	\$ (15,005)	\$ (6,425)	\$ (114,804)	\$ 4,317	\$ (31,163)	\$ (10,937)	\$ (828)	\$ (754)	\$ (12,226)	\$ -	\$ 24,442	\$ -	\$ (22)	\$ -	\$ -
YTD % of Budgeted Funds Expended		1.29%	149.56%	66.99%	57.77%	112.66%	74.50%	63.27%	37.85%	66.05%	100.00%	76.40%	0.00%	24.65%	61.18%	0.00%

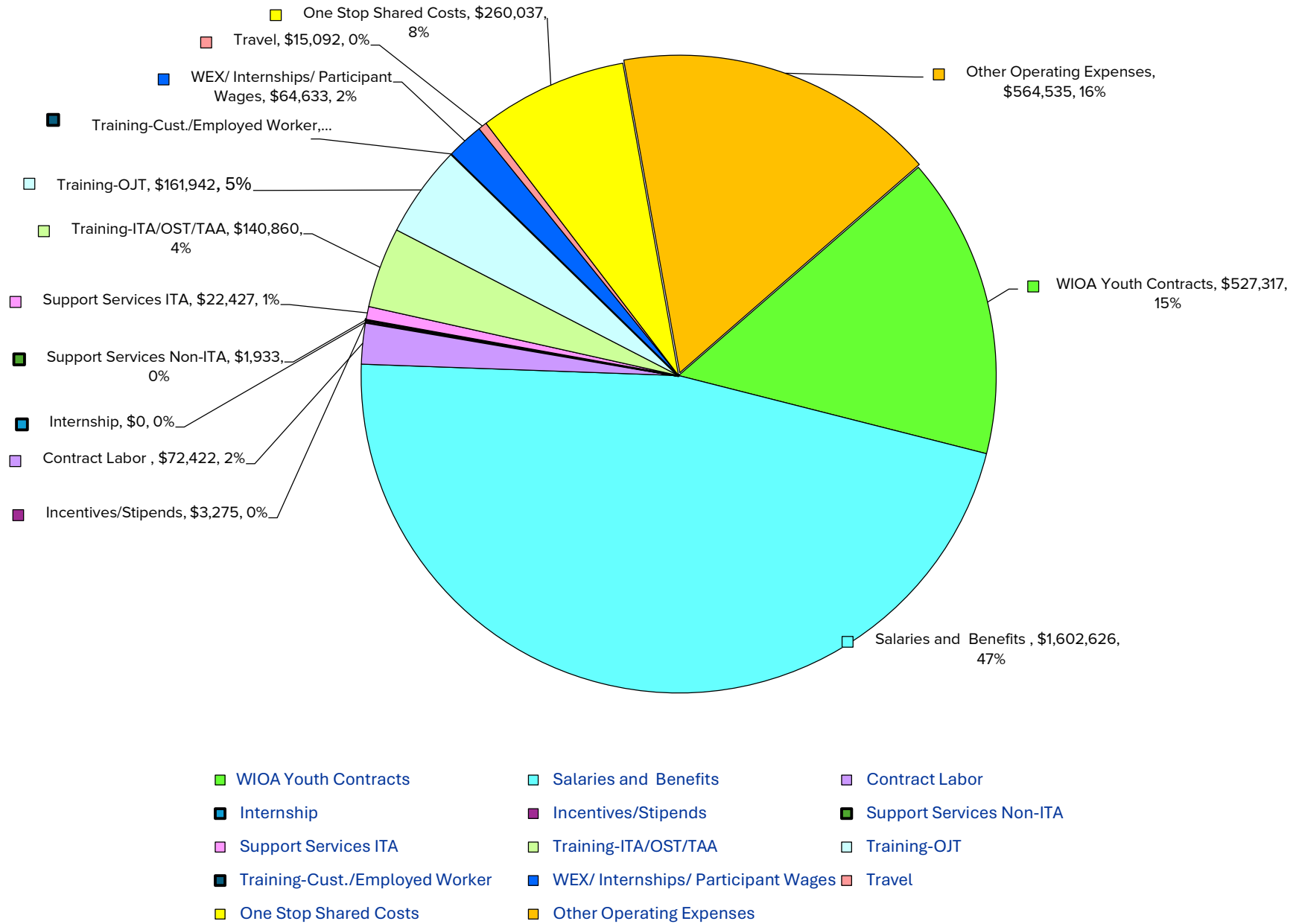
LWDB 20
Summary of Funding and Expenditures
As of March 31, 2026

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 Actual	PY 25-26 Budget	VARIANCE	% Expended
PY 25-26 Allocations	\$ 163,571	\$ 90,000	\$ -	\$ 130,000	\$ -	\$ 3,091	\$ 140,000	\$ -	\$ 6,210,905			
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	\$ -	\$ 5,167,224			
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	\$ -	\$ 5,394,231		
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	\$ 141,300	\$ 90,000	\$ -	\$ 5,400	\$ -	\$ 2,248	\$ 131,725	\$ -	\$ 1,353,057	\$ 6,210,905	\$ 4,857,849	21.785%
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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,792,094	\$ 2,034,681	\$ 242,587	88.077%
Total DEO Grant Funding	\$ 141,300	\$ 90,000	\$ -	\$ 5,400	\$ -	\$ 2,248	\$ 131,725	\$ -	\$ 3,145,151	\$ 5,167,224	\$ 2,022,073	60.867%
OTHER NON DEO REVENUES	\$ -	\$ -	\$ 50,461	\$ -	\$ 80,651	\$ -	\$ -	\$ 6,496	\$ 148,704	\$ 227,008	\$ 78,304	65.506%
TOTAL	\$ 141,300	\$ 90,000	\$ 50,461	\$ 5,400	\$ 80,651	\$ 2,248	\$ 131,725	\$ 6,496	\$ 3,293,855	\$ 5,394,231	\$ 2,100,377	61.063%
% of Total Budgeted Funding Received	86.38%	100.00%	112.82%	0.00%	48.88%	0.00%	94.09%	56.26%	61.06%			
EXPENDITURES									PY 25-26 Actual	PY 25-26 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ 18,263	\$ 7,756	\$ 6,792	\$ 374	\$ 12,843	\$ -	\$ 18,900	\$ 2,816	\$ 391,259	\$ 548,372	\$ 157,113	71.35%
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 279,512	\$ 402,460	\$ 122,948	69.45%
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 111,747	\$ 145,912	\$ 34,165	76.59%
Allocated Indirect Costs	\$ 16,974	\$ 7,166	\$ 4,792	\$ 540	\$ 12,843	\$ -	\$ 18,900	\$ 1,482	\$ (0)	\$ (0)	\$ (0)	
Reclassification	\$ 1,289	\$ 590	\$ 2,000	\$ (166)	\$ -	\$ -	\$ -	\$ 1,334	\$ -	\$ -	\$ -	
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Program Training	\$ 115,510	\$ 67,034	\$ 29,293	\$ 3,347	\$ 78,146	\$ 2,248	\$ 114,755	\$ 10,045	\$ 3,045,839	\$ 4,784,310	\$ 1,738,471	63.7%
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 527,317	\$ 750,000	\$ 222,683	70.3%
Salaries and Benefits	\$ 86,629	\$ 27,780	\$ 2,392	\$ 2,911	\$ 3,382	\$ -	\$ 2,898	\$ -	\$ 1,323,114	\$ 2,261,011	\$ 937,897	58.5%
Contract Labor	\$ -	\$ -	\$ -	\$ -	\$ 1,991	\$ -	\$ -	\$ -	\$ 72,422	\$ 9,347	\$ (63,075)	774.8%
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,275	\$ 14,198	\$ 10,923	23.1%
Support Services Non-ITA	\$ -	\$ -	\$ 50	\$ -	\$ -	\$ -	\$ -	\$ 168	\$ 1,933	\$ 10,000	\$ 8,067	19.3%
Support Services ITA	\$ -	\$ -	\$ 1,891	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 22,427	\$ 54,895	\$ 32,468	40.9%
Training-ITA/OST/TAA	\$ -	\$ -	\$ 21,903	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 140,860	\$ 331,330	\$ 190,470	42.5%
Training-OJT	\$ -	\$ 9,053	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 161,942	\$ 320,746	\$ 158,804	50.5%
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ 64,633	\$ -	\$ -	\$ -	\$ 64,633	\$ 104,448	\$ 39,815	61.9%
Travel	\$ 230	\$ 119	\$ 6	\$ 2	\$ -	\$ -	\$ -	\$ 8	\$ 15,092	\$ 16,190	\$ 1,098	93.2%
One Stop Shared Costs	\$ 12,888	\$ 4,304	\$ 360	\$ 150	\$ 189	\$ 2,248	\$ -	\$ 553	\$ 260,037	\$ 402,021	\$ 141,984	64.7%
Other Operating Expenses	\$ 593	\$ 451	\$ 17	\$ 1	\$ 786	\$ -	\$ 104,209	\$ 5,421	\$ 452,788	\$ 510,123	\$ 57,335	88.8%
Allocated Program Indirect	\$ 9,471	\$ 3,998	\$ 2,674	\$ 301	\$ 7,166	\$ -	\$ 10,545	\$ 832	\$ (0)	\$ 0	\$ -	
Reclassification	\$ 5,698	\$ 21,328	\$ -	\$ (18)	\$ -	\$ -	\$ -	\$ 164	\$ 0	\$ -	\$ 0	
Total Expenditures	\$ 133,772	\$ 74,790	\$ 36,085	\$ 3,722	\$ 90,988	\$ 2,248	\$ 133,655	\$ 12,861	\$ 3,437,098	\$ 5,332,678	\$ 1,895,580	64.5%
Funding Over/(under) expenditures	\$ 7,528	\$ 15,210	\$ 14,377	\$ 1,678	\$ (10,337)	\$ -	\$ (1,930)	\$ (6,365)	\$ (143,244)			
YTD % of Budgeted Funds Expended	81.78%	83.10%	80.68%	2.86%	55.14%	72.73%	95.47%	111.38%	63.72%			

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 3/31/2026

Assets

Current assets

Cash - Accounts Payable	4,753.50
Cash - Payroll	35,254.21
Cash - Business Checking W/Int.	226,255.96
Accounts Receivable Customers	111.03
Accounts Receivable - Other	9,011.91
Prepaid Expenses	22,801.99
Due TO/ Due FROM	2,585.91

Total Current assets 300,774.51

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 **384,754.99**

Liabilities & Net Assets

Current Liabilities

Accounts Payable	41,982.48
Accrued Expenses	71,822.71
Federal Withholding Tax	(0.01)
FICA Payable	0.60
SUTA Payable	1,050.71
Principal Insurance	286.94
Health Insurance Payable	1,990.35
AFLAC Payable	1,029.49
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	1,852.50

Total Current Liabilities 252,480.41

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	(900,307.62)
Total Net Assets	132,274.58

Total Liabilities & Net Assets **384,754.99**

AGENDA ITEM SUMMARY

Title	Consent Agenda
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Board By-Laws
Action Requested	Approve Consent Agenda, as presented
Background	<p>Consent Agenda</p> <ul style="list-style-type: none"> a. Review and Approve February 4, 2026, Board of Directors Meeting Minutes b. Review and Approve February 25, 2026, Program and Services Meeting Minutes c. Review and Approve April 21, 2026, Youth Council Meeting Minutes d. Review and Approve March 13, 2026, Executive Committee Meeting Minutes <ul style="list-style-type: none"> i. Review and Approve Financial Statements for December 2025, January, and February 2026 ii. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Youth Program Eligibility and Service Provider Selection Policy iii. Review and Approve Workforce Innovation and Opportunity Act (WOA) - On-the-Job Training Program Policy Revisions iv. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Business Engagement and Economic Development Support Policy v. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Emergency Response and Disaster Recovery Policy
Staff Recommendation	Review and Approve Consent Agenda Items, as presented
Supporting Material	Meeting Minutes, Draft Policies
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

Agenda Item 6a Board of Directors Meeting Minutes

February 4, 2026

Meeting Agenda

1. Welcome & Call to Order
2. Pledge of Allegiance Roll
3. Call and Attendance
 - a. Board
 - b. Staff
4. Declarations of Conflicts of Interest
5. James Moore and Company Presentation of the Financial Statements Audit - Year End June 30, 2025 and 2024, Form 990 Draft, Year Ending June 30, 2025

Voting Items

6. Review and Approve Acceptance of Financial Statements Audit - Year End June 30, 2025, and 2024, Form 990 Draft, Year Ending June 30, 2025
7. Consent Agenda
 - a. Review and Approve September 24, 2025, Board of Directors Meeting Minutes
 - b. Review and Approve November 19, 2025, Program and Services Meeting Minutes
 - c. Review and Approve January 20, 2026, Youth Council Meeting Minutes
 - d. Review and Approve January 16, 2026, Executive Committee Meeting Minutes
 - i. Review and Approve October and November Financial Reports - PY 2025-2026
 - ii. Review and Approve Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker Program Eligibility Policy
 - iii. Review and Approve Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker Program Supportive Services Policy Revisions
 - iv. Review and Approve Workforce Innovation and Opportunity Act (WIOA) Individual Training Account Policy Revisions
 - v. Review and Approve Supplemental Nutrition Assistance Program (SNAP) Employment and Training Program Components and Case Management Policy
 - vi. Review Acceptance of Executive Meeting Minutes:
 - a. October 17, 2025
 - b. November 14, 2025
 - vii. Review President/CEO Annual Performance Evaluation

8. Review and Approve Board Member CSF Contract/COI Exemption Request for Erin Lowry-PY2025-2026
9. Review and Approve Local Targeted Occupations List (LTOL) for 3rd Quarter - PY2025-2026
10. Review and Approve Internal Control Questionnaire (ICQ) for PY 2025-2026
11. Review and Approve Extension of Provider of Direct Services for PY 2026-2029
12. Review and Approve Release of WIOA Youth Services Request for Proposal (RFP)
13. Review and Approve Executive Staff Cost of Living Increase

Information/Discussion

14. Primary Indicators of Performance - 1st Quarter
15. One-Stop Operator Report - 1st and 2nd Quarters
16. Workforce Readiness Taskforce Report - 4th Quarter
17. Chair’s Report
 - a. Ad Hoc Search - Board Membership Update
 - Nomination of Andrea Beam for Appointment to the Workforce Development Board of the Treasure Coast
18. President’s Report
19. Open to the Public
20. Open to the Board
21. Adjournment - Next Board of Directors Meeting - April 29, 2026

Members Present

Kelly Johnson	Jim Brann	Aliesha Seitz
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Members Participating by Teleconference

Leslie Kristof	Lorna Landherr	Christie Shields
Bob Cenk	Terrance Moore	Angela Browning
William Armstead	Mike Kauffmann	Jose Cappellan

Members Excused

Tracey Miller	Deb Frazier	Erin Lowry
David Freeland	Kevin Staten	Joseph Catrambone
Werner Bols	Pamela Burchell	

Public in Attendance

Corinne LaRoche	Glenda Hardin
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Administrative Staff Participating In-person/Teleconference

Brian Bauer	Tracey McMorris	Christina Coble
Lisa Deligatti	Martin Rivera	Jennifer Eimann



Call to Order

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

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

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

Agenda Item 5 - 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 6 - 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.

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 7 - Consent Agenda:

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

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

Agenda Item 8 - 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 is reviewed and approved for Commissioner Fowler.

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

Angela Browning 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 9 - Review and Approve Local Targeted Occupations List (LTOL) for 3rd Quarter - PY2025-2026:

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

- Public Safety Telecommunications (SOC code 43-5031)

No other changes were made to the LTOL - there were no deletions, and all other occupations remain the same.

Leslie Kristof moved to approve the Local Targeted Occupations List (LTOL) for 3rd Quarter - PY2025-2026, as presented. Terrance Moore seconded the motion, which passed unanimously.

Agenda Item 10 - Review and Approve the Florida Department of Commerce (FLORIDACOMMERCE) Internal Control Questionnaire (ICQ) and Assessment - PY 2025-2026:

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.

Christi Shields moved to approve the Florida Department of Commerce (FLORIDACOMMERCE) Internal Control Questionnaire (ICQ) and Assessment - PY 2025-2026, as presented. Angela Browning seconded the motion, which passed unanimously.



Agenda Item 11 - Review and Approve Extension of Provider of Direct Services for PY 2026-2029:

Tracey McMorris, Vice President of Operations/COO, explained that WIOA allows Local Workforce Development Boards (LWDBs) to be designated as direct providers of intake, assessment, eligibility determination, or other services except for training services. This designation may occur only with the agreement of the Chief Elected Official and the Governor and must be approved by CareerSource Florida for a period not to exceed three years. CSRC’s designation as a Direct Service Provider expires June 30, 2026. Therefore, we are required to request another three-year extension, PY 2026-PY2029, as a direct provider of services through a structured application process.

Angela Browning moved to approve the Extension of Provider of Direct Services for PY 2026-2029, as presented. Christi Shields seconded the motion, which passed unanimously.

Agenda Item 12 - Review and Approve Release of WIOA Youth Services Request for

Proposal (RFP):

Brian Bauer, President/CEO, shared that career services available under CareerSource Research Coast’s WIOA Youth program “Youth Connections” are provided by a competitively procured, sub-recipient service provider for a contract period of five years, renewed annually based on the performance of the Service Provider. With the current Service Provider’s term expiring on June 30, 2025, a formal Request for Proposals must be issued for Program Years 2025-2026 through 2026–2027. The Board of Directors must approve the issuance of the Request for Proposal prior to its release.

Kelly Johnson moved to approve the Release of WIOA Youth Services Request for Proposal (RFP): as presented. Aliesha Seitz seconded the motion, which passed unanimously.

Agenda Item 13 - Review and Approve Executive Staff Cost of Living Increase:

In accordance with the DEO Grantee/Sub-Grantee Agreement requirements, any modifications to executive staff compensation must receive documented Board approval and comply with local policies and procedures. The Board must verify that these adjustments represent reasonable and necessary investments in successful award performance and demonstrate prudent use of federal funding. The Executive Committee is asked to review and recommend cost of living increases for the Executive staff of 3%.

- Brian Bauer - COLA \$151,500
- Tracey McMorris - COLA \$111,000
- Lisa Delligatti - COLA \$111,000

Angela Brownig moved to approve the Executive Staff Cost of Living Increase, as presented. Christi Shields seconded the motion, which passed unanimously.

Agenda Item 14 - Primary Indicators of Performance - 1st Quarter:

Brian Bauer, President/CEO, stated that the State of Florida must negotiate and agree upon performance levels for WIOA and WP programs funded by the United States Department of Labor, Employment and Training Administration. Once the state levels are established, the Department of Commerce (FLORIDACOMMERCE) must negotiate and reach agreements with the Local Workforce Development Boards regarding their local performance.



The organization is currently showing two "yellow" metrics (below the 90% negotiated threshold) for program year 24-25.

- Youth credential attainment rate: 87.79% (needs 90%)
- Dislocated worker (DW) median wage, 2nd quarter after exit: also below 90%

Mr. Bauer explained that the Dislocated Worker metrics are due to the following:

- The DW cohort is very small, so each individual who misses the wage target has an outsized impact on the metric
- This is a known, recurring challenge — a similar issue occurred in 2022-23 or 2023-24 when the cohort was just 3 people
- Previously, the team successfully increased DW enrollments, but did not also pivot to monitoring the wages of those cohorts in real time
- Reporting systems are described as outdated and "archaic," and the team has faced year-over-year funding and staffing cuts, making detailed tracking harder

Strategies Going Forward:

- Break down wage goals by population (DW vs. adult) rather than tracking only aggregate wages
- Use predictive reports to monitor cohort wages in real time while waiting for better data infrastructure
- Regional planning partners are developing dashboards that should eventually provide better real-time visibility
- Leadership acknowledged they will not hit the DW metric this year on raw numbers, though a statistical adjustment model could potentially change the outcome

Additional Context

- Florida Commerce confirmed during a recent monitoring visit that small DW cohorts missing this metric are not unique to this board
- There is inherent tension between serving high-priority DW populations and also serving high-barrier, low-income individuals whose wage outcomes may take longer to materialize

Agenda Item 15 - One-Stop Operator Report - 1st and 2nd Quarters:

Glenda Harden, Workforce Coordination Consulting, LLC., provided an overview of the 3rd quarter report, noting the relocation of the one-stop center and the shift to virtual services for partners.

One-Stop Operator Report Summary: *July – December (Q1 & Q2, Program Year)*

Partner Re-engagement: As of October, all partners have returned to physical presence at the Career Centers. Two dedicated cubicles have been set up with laptops and necessary resources to support partner operations on-site.

Partner Organizations - Current partners include:

- Indian River State College (*Career & Education, Employment Opportunity, Adult Education*)
- Foreign Worker Career Development Program
- Division of Blind Services
- Vocational Rehabilitation
- AARP
- St. Lucie County Community Services

All partners, with the exception of AARP, have been actively attending quarterly meetings.



Quarterly Meetings & Collaboration: Meetings have been highly engaging. Partners have requested that Gregory McDonald, Career Center Manager, attend their staff meetings periodically so partner organizations can present new and updated services. To date, Indian River State College and the Farm Worker Program have participated in these presentations.

Customer Service Satisfaction Survey: Collecting completed satisfaction surveys remains an ongoing challenge. Multiple strategies have been attempted, and a new method is currently being piloted. Results will be reported at a future meeting.

Overall Outlook: The return to in-person collaboration has been a positive development. Partner cooperation is strong, and the team is optimistic about continued progress.

Agenda Item 16 - Workforce Readiness Taskforce Quarterly Report:

Christina Coble, Business Services Manager, explained that the Workforce Readiness Task Force (also known as the Education and Industry Consortium) held its quarterly meeting on December 4, 2025, with a focus on the **healthcare sector**. Consistent with the format adopted over the past three quarters, the meeting featured a targeted labor market presentation followed by an industry panel discussion.

Panel Participants:

In addition to consortium members, the following healthcare and education experts were invited to participate:

- Lorna Lander – Cleveland Clinic Indian River Hospital (*Board Member*)
- Leslie Haviland – Cleveland Clinic Martin Health
- Anne Hubbard – Indian River State College
- Maureen Harry – Kaiser
- Ashley Cummings & Victoria McMillan – The Havana at Jensen Dunes (*Assisted Living & Memory Care*)

Board member Jim also attended, along with several other Board members.

The full meeting report and minutes are available on the organization's website.

Key Takeaways: Critical Healthcare Staffing Needs:

The panel identified several high-demand occupations with significant workforce gaps in the region:

- Medical Laboratory Technicians – IRSC offers a program (supported by WIOA funding), but produces only ~15 graduates annually despite numerous open positions. Increased student recruitment is a priority.
- Respiratory Therapists – A critical shortage exists both locally and nationally.
- Radiographers – Demand outpaces the current supply of trained professionals.
- Dental Hygienists – Only 10 graduates annually from IRSC, serving a market of approximately 200 area dentists. This represents a significant gap and a strong career opportunity given the occupation's high wage potential.

Notable Update: Legacy High School Dental Program

Legacy High School currently has a dental aide program with full infrastructure in place — including six dental chairs — and is actively working to expand. With seniors enrolled next year, the program aims to grow its capacity and help feed the pipeline of dental professionals into the local community.

Agenda Item 17 - Chair’s Report:

Jim Brann, Chair, Mr. Brann announced that Andrea Bean has submitted an application to serve on the Board of Directors. Mr. Bauer will convene a Treasure Coast Workforce Consortium meeting in March 2026 to present Ms. Bean's application for acknowledgement and official endorsement. Her term will run from July 1, 2026 through June 30, 2027.

Agenda Item 18 - President’s Report:

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

State Legislation & Performance Metrics: Florida legislators expressed that federal performance indicators, while required, are insufficient for ensuring workforce boards are adequately serving their local communities. As a result, the letter grade system was introduced, and additional metrics may be considered in the future to strengthen accountability to Floridians.

Federal Funding Update: The federal government recently passed five of six appropriations bills, including funding for WIOA and TANF. This eliminates the need for continuing resolutions and provides stable funding through fiscal year 2026, with some programs funded through 2027. Funding levels are expected to remain relatively flat, though a 5–10% decrease nationwide is possible. The impact on Florida's specific allocation is still being assessed.

Programmatic Monitoring Results: The agency recently completed its programmatic monitoring review for program year 2024–25. The results were strong, with only eight findings across all programs and five observations and management notes. No critical or systemic errors were identified — issues were largely minor human or data entry errors. Board governance also fared well, with one area of concern related to the Education Industry Task Force membership structure currently being reviewed with state guidance.

11th Annual City of Fort Pierce Job Fair: The annual job fair was a record-breaking success, with over 900 pre-registered job seekers — the highest attendance in the event's 11-year history. Approximately 70 employers participated. Rising registration numbers reflect broader trends in increasing local unemployment figures, with St. Lucie County approaching 5% unemployment. Leadership noted that while the percentage is important, the shrinking total workforce population is equally significant to monitor. Special recognition was given to Gregory, Christina, and the business services team for outstanding event execution.

Agenda Item 19 - Open to the Board:

No comments

Agenda Item 20 - Open to the Public:

No Comments

Agenda 21 - Adjournment:

With no further items to discuss, Jim Brann, Chair, made a motion for adjournment. All members agreed, and the meeting was adjourned at 9:06 a.m.

The next Board of Directors Meeting will be held on April 29, 2026



STAFF CERTIFICATION

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

Brian Bauer
Board Staff

Date



6b Agenda Item Programs and Services Meeting Minutes

February 25, 2027

Opening Remarks

1. Welcome & Attendance

Voting Items

2. Review/Approve Workforce Innovation and Opportunity Act (WIOA) - Youth Program Eligibility and Service Provider Selection Policy (Approved by YC 1/20/26)
3. Review/Approve Workforce Innovation and Opportunity Act (WIOA) - On-the-Job Training Program Policy Revisions
4. Review/Approve Workforce Innovation and Opportunity Act (WIOA) – Business Engagement and Economic Development Support Policy (New Policy)
5. Review/Approve Workforce Innovation and Opportunity Act (WIOA) - Emergency Response and Disaster Recovery Policy (New Policy)
6. Review/Approve PY2025-26 4th Quarter Local Targeted Occupations List (LTOL)

Information/Discussion

7. Review 2026 FloridaCommerce Quality Assurance Monitoring Preliminary Exit Summary
8. CareerSource Research Coast (CSRC) Programs Update
 - a. Hope Florida
 - Participant Enrollments
 - Hope Florida Employers
 - b. CareerSource Research Coast (CSRC) Business Services Update
 - Participant Enrollments
 - City of Fort Pierce Job Fair Update
 - Treasure Coast-Palm Beach Regional Planning Area Job Fair
 - c. Wagner-Peyser/Migrant & Seasonal Farmworkers/RESEA
 - Staffing Update
 - d. Welfare Transition (WT) Program, Supplemental Nutrition Assistance Program (SNAP)
 - Staffing
 - Collaboration with WIOA Youth Team
 - Increased SNAP Participant Volume
 - e. Workforce Innovation and Opportunity Act (WIOA) Program - Adult/Dislocated Worker/Youth
 - Training Grants
 - WIOA Youth Internal Performance
 - WIOA Youth Participants
9. Adjournment - Next P & S Meeting - May 27, 2026

Members Present

Bob Cenk

Members Participating by Teleconference

Jim Brann Kelly Johnson

Members Excused

Jose Capellan Angela Browning Deb Frazier

Members Unexcused

None

Staff Present

Tracey McMorris Shelly Batton Kate Sayger
Jodi Thomas Stacey Schaefer Martin Rivera
Jennifer Eimann

Call to Order

Bob Cenk, Chair, called the meeting to order at 8:05 a.m. A quorum was not established. Mr. Cenk agreed to move voting items 1-6 to the next Executive Committee meeting, which will be held on March 13, 2025, for review and approval. All committee members agreed.

Agenda Item 7 - Review 2026 FloridaCommerce Quality Assurance Monitoring Preliminary Exit Summary:

Tracey McMorris, Vice President of Operations/COO, reviewed a preliminary quality assurance monitoring exit report covering activity from February 1 through December 31, with monitoring conducted January 26–30. The preliminary report identified fewer than ten findings overall, no program with more than two findings, and largely clerical issues in sampled records. Ms. McMorris noted the report was not final, and supporting attachments were not yet available for review.

Agenda Item 8 - CareerSource Research Coast (CSRC) CSRC Program Update:

a. In Christina Coble’s absence, Tracey McMorris presented the following CSRC Program Update.

- **HOPE FLORIDA PROGRAM:**

Christina Coble has assumed full oversight of the Hope Florida program, covering both participant navigation and employer engagement.

Key metrics to date:

- 508 Hope Florida participants enrolled
- 153 participants have gained employment
- Approximately one-third of participants are being assessed for training opportunities (Occupational Skills or OJT)

We have implemented a strong case-conferencing process: as participants become job-ready, they are prioritized for one-on-one meetings with the Business Services team, which then proactively creates employer opportunities. This best practice has been shared with the state, and other boards have begun adapting it.

On the employer side:

- 31 Hope Florida employers committed — well above the state average
- 5 Hope Florida-specific job orders created

b. In Christina Coble's absence, Tracey McMorris presented the following Business Services Update:

- **ON-THE-JOB TRAINING (OJT):**
To date, we have committed \$156,000 in OJT contracts to employers. Actual spending through December stands at \$86,245.29. We are approximately 50% through the program year and remain on track with our spending goals.
- **CITY OF FORT PIERCE JOB FAIR:**
This year's job fair was our strongest yet, with record-breaking attendance:
 - 964 job seekers served
 - 72 employers in attendance
 - 17 community partners participating

Ms. McMorris shared that employer feedback was very positive, with strong candidate quality noted throughout the event. Our team is currently conducting employer follow-up to track placement outcomes and determine how many engagements resulted in hires. Staff will report back to the committee with those findings.

- **Regional Job Fair Coming in May::**
Ms. McMorris explained that CareerSource Research Coast (CSRC) is collaborating with CareerSource Palm Beach (CSPB) on a regional job fair planned for May, to be held at the IRSC Chastain Campus. The event will target employers with a presence in both counties and job seekers from across both service areas. We are aiming for 30–35 employer participants. This initiative reflects our commitment as regional planning partners and is intended to become an annual event.

c. Wagner-Peyser/Migrant & Seasonal Farmworkers/RESEA:

- Wagner-Peyser updates focused on improving intake to ensure one-on-one customer service in the resource room. Wagner-Peyser will implement an Employee Florida Rapid Registration QR tool after the end-of-March training to streamline customer registration.
- The MSFW position remains in recruitment with interviews planned.
- RESEA is now fully staffed following an internal transition.

d. Welfare Transition (WT) Program, Supplemental Nutrition Assistance Program (SNAP) - Jodi Thomas, Wagner-Peyser Program Coordinator, provided the following update.

- Ms. Thomas shared that the WTP/SNAP programs have strengthened their collaboration with the WIOA youth program, as both the Welfare Transition and SNAP programs depend heavily on community service work experience sites. Through this partnership, additional work sites are being sourced to improve participation outcomes for our clients.

Ms. Thomas stated that there has been a significant increase in SNAP volume. As noted in our last meeting, recent policy changes under the new bill removed homelessness and veteran status as exemptions, which has directly contributed to this uptick. In response, we have adapted by expanding orientation attendance to accommodate the growing caseload.

e. Workforce Innovation and Opportunity Act (WIOA) Program - Adult/Dislocated Worker/ Youth - Kate Sayger, Program Coordinator, shared the following update:

- Staffing Updates - The WIOA Adult/DW team has faced staffing challenges since October, operating with only two career planners after Diego Parada and Monica Rivera, both of whom transitioned to new roles. Two new hires have since brought the team back to full capacity.

Diane von Kauser joined CSRC in early January. She brings prior WIOA supervisory experience from another state and has exceeded expectations during training. She is expected to begin working directly with clients the following week.

Kiana Kelly started on Monday and is currently in training.

- Program Enrollment & Trends (Since July 1st) - 50 newly enrolled clients in the Adult/DW program, with 20 enrolled in ITA or in-school training with top training areas in CDL Class A licensing, registered nursing, paramedic, and practical nursing — consistent with last year's trends. One new enrollment in cybersecurity was noted as a positive emerging trend.
- WIOA Youth Program - 41 participants enrolled as of the end of January, putting the program on track with its performance metrics.

The youth team has been proactively pursuing mental health training and credentials to better support participants experiencing mental health challenges, which has been an increasing trend.

- On-the-Job Training (OJT) - Approximately 30 clients enrolled in OJT since the start of the program year.

Agenda Item 9 - Adjournment:

With no further items to discuss, Bob Cenk moved to adjourn the meeting, seconded by Jim Brann. All members agreed, and the meeting was adjourned at 8:34 a.m.

BOARD STAFF CERTIFICATION

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

Tracey McMorris
Board Staff

Date



6c Agenda Item Youth Council Meeting Minutes

April 21, 2026

Opening Remarks

1. Welcome & Attendance

Voting Items

2. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Youth Program Supportive Services Policy Revisions
3. Review and Approve RFP# 26-001-YWS Sub-Recipient Contract Recommendation

Information/Discussion

4. Workforce Innovation and Opportunity Act (WIOA) - Youth Connections Success Story
5. Workforce Innovation and Opportunity Act (WIOA) - Youth Connections Program Update
6. Workforce Innovation and Opportunity Act (WIOA) - Youth Connections Performance Report
7. LWDB 20 Primary Indicators of Performance 2nd Quarter - PY 2025-2026
8. CSRC Summer Projects Update
9. Adjournment

Members Participating by Teleconference:

Christie Shields, Rebecca Petrie, Aliesha Seitz

Members Present

Terrance Moore

Members Excused

William Armstead, Robert McPartlan, Tracey Miller

Members Unexcused

None

Staff Participating In-person/Teleconference

Tracey McMorris, Kate Sayger, Angie Strickland, Jennifer Eimann

Public Attendance

Kimberly Grey

Call to Order:

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

Mr. Moore informed council members that the meeting agenda would be reordered. Staff will first present Information/Discussion Items 4 and 5, after which all Eckerd staff will be dismissed prior to the review and vote on Item 3 — RFP# 26-001-YWS Sub-Recipient Contract Recommendation due to Eckerd Youth Connections having submitted a proposal for that item.

Agenda Item 4 - Workforce Innovation and Opportunity Act (WIOA) - Youth Connections**Success Story:**

Angie Strickland, Program Manager, shared that Steve, a client of Eckerd Youth Connections, has demonstrated exceptional resilience from an early age, persevering through significant adversity in an underserved community to excel academically and athletically in high school. His dedication earned him a football scholarship — a milestone that represented a promising path forward. However, his trajectory was fundamentally altered when he sustained a life-changing spinal injury, resulting in quadriplegia. Faced with the sudden loss of his scholarship, his independence, and the future he had worked toward, Steve was compelled to redefine his sense of purpose entirely.

His road to recovery gained direction through the dedicated efforts of Ms. Strickland, who leveraged partnerships with local agencies, employers, Eckerd Youth Connections, and CareerSource Research Coast staff to provide Steve with the support he needed. Through this collaborative network of resources, Steve methodically rebuilt his confidence, developed marketable customer service competencies through hands-on internship experiences, and regained a forward-looking perspective. His commitment to growth and professional development ultimately led to his placement as an Internet Consultant at a local automotive dealership, which is a testament to his perseverance and determination to succeed on new terms.

Agenda Item 5 - Workforce Innovation and Opportunity Act (WIOA) - Youth Connections Program**Update:**

Angie Strickland, Program Manager, Eckerd Youth Connections, provided an update on the Youth Connections program, noting that it is progressing well overall.

Ms. Strickland highlighted the positive impact of community partnerships, which have played a significant role in the program's success. These partnerships have led to the organization of successful job fairs, providing youth with valuable employment opportunities and connections to potential employers. In addition to job fairs, the program has engaged in various community outreach efforts aimed at supporting and empowering young people in the area.

Agenda Item 6 - Workforce Innovation Opportunity Act (WIOA) - Youth Connections Performance Report - PY 2025-2026:

Angie Strickland, Program Manager, Eckerd Youth Connections, shared that the performance report covers Youth Connections' progress beyond federal metrics, including their contract deliverables.

Eckerd Youth Connections is on track with all contract deliverables, including enrollment targets for in-school and out-of-school youth, internship placements, successful outcomes, and expenditure goals. Final expenditure data for the most recent month is pending Finance's close, but performance trends indicate they remain on target. No issues were reported.

Terrance Moore, Chair, announced that the council was moving to the previously discussed voting items 2 and 3. Angie Strickland and Kimberly Grey, both of Eckerd Youth Connections, were then dismissed from the meeting.

Agenda Item 2 - Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Youth Program Supportive Services Policy Revisions:

Kate Sayger, Program Coordinator, stated that the Youth Supportive Services policy was recently updated. Supportive services are one of the 14 required program elements for the youth program, designed to help youth participants successfully engage in and complete their assigned activities.

The key changes include aligning the youth policy more closely with the Adult and Dislocated Worker Supportive Services policy. A notable addition is that any support services not listed in the approved chart, or those exceeding quantity limitations, now require final approval from Tracey, the COOVP.

The quantity limitations chart was also revised. Rather than setting fixed dollar caps, such as \$100 per physical per program year or \$50 for gas cards per month, the new approach bases limitations on each individual youth's needs, allowing for more tailored support and better overall service delivery.

Christi Shields moved to approve the Workforce Innovation and Opportunity Act (WIOA) - Youth Program Supportive Services Policy Revisions, as presented. Rebecca Petrie seconded the motion, which passed unanimously.

Agenda Item 3 - Review and Approve RFP# 26-001-YWS Sub-Recipient Contract Recommendation:

Tracey McMorris, Vice President of Operations/COO, presented the results of a Request for Proposals (RFP) issued on February 4th for WIOA Youth Services, as the current contract with Eckert is in its final year.

Four proposals were received, of which three advanced to the rating team after one failed technical review. The three reviewed proposals were from:

- Treasure Coast Center for Economic Development (TCC)
- Boys & Girls Club of St. Lucie County (BGC-SLC)
- Eckert (incumbent)

After evaluation, the rating team recommended continuing the contract with Eckert for the next five-year period. The primary basis for this recommendation was that demonstrated experience with WIOA Youth Services is a mandatory requirement, and Eckert was the only proposer to meet that threshold. While other proposals showed merit and innovative ideas, they did not satisfy this core requirement.

Staff noted that certain budget items — specifically the ratio of youth served to current staffing levels — will be addressed during the contracting phase. Overall, Eckert was praised for delivering quality work and consistently meeting program outcomes.

A motion to approve the contract recommendation was then sought from the board.

Christi Shields moved to approve the RFP# 26-001-YWS Sub-Recipient Contract Recommendation, as presented. Rebecca Petrie seconded the motion, which passed unanimously.

Agenda Item 7 - LWDB 20 Primary Indicators of Performance 2nd Quarter - PY 2025-2026:

Tracey McMorris, Vice President of Operations/COO, shared that most federal metrics are being met; however, the credential attainment rate remains below the negotiated target of 90.1%, currently sitting at 72.5% as of Q2. Analysis of the affected cohort suggests this metric will likely not be met for the current program year based on raw data, though Florida Commerce's statistical adjustment model may improve the outcome. Process and practice changes have already been implemented to prevent recurrence, and leadership is confident that performance goals will be met or exceeded in the next program year.

Agenda Item 8 - CSRC Summer Projects Update:

Tracey McMorris, Vice President of Operations/COO, Summer Success Program & TANF Summer Project Updates.

CareerSource has been operating a TANF-funded summer program focused on pregnancy prevention for the past three to four years, partnering with community vendors whose programs included a pregnancy prevention component.

Due to recent changes in allowable use of funds under TANF guidelines, pregnancy prevention is no longer an eligible program purpose. As a result, CareerSource will pause the program this year to regroup and redesign it.

The rebuilt program, planned for launch in 2027, will shift focus to an employment-based summer program, aligning with the existing Summer Success Program. This new direction is expected to expand the reach of Summer Success and increase the number of youth served.

The council was notified of this change prior to vendors being informed, as a courtesy to ensure members were aware before any public announcement.

Agenda Item 9 - Adjournment:

Having no other business, the Youth Council meeting was adjourned at 8:41 AM.

BOARD STAFF CERTIFICATION

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

Board Staff
Tracey McMorris

Date

Agenda Item 6d Executive Committee Meeting

March 13, 2026

Opening Remarks

1. Welcome & Attendance
2. Conflict of Interest Declaration

Voting Items

3. Review and Approve December and January Financial Reports - PY 2025-2026
4. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Youth Program Eligibility and Service Provider Selection Policy
5. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - On-the-Job Training Program Policy Revisions
6. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Business Engagement and Economic Development Support Policy
7. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Emergency Response and Disaster Recovery Policy
8. Review and Approve PY2025-26 4th Quarter Local Targeted Occupations List (LTOL)
9. Review and Approve Application for Subsequent Local Workforce Development Area (LWDA) Designation - Program Years 2026 and 2027
10. Review and Approve Extension of Timeline for Workforce Innovation and Opportunity Act (WIOA) - Youth Program Request for Proposal (RFP) RFP # 26-001-YWS

Information/Discussion

11. Primary Indicators of Performance – 2nd Quarter - PY 2025-2026
12. Local Workforce Development Board Membership Composition and Certification
13. Letter Grade Performance Update - 1st quarter PY 2025-2026
14. CareerSource Research Coast (CSRC) Update
 - Ad Hoc Search Committee - Board Membership
 - Board Membership
15. Adjournment - Next Committee Meeting - April 17, 2026



Member Present

Jim Brann Bob Cenk

Members Participating by Teleconference:

Jim Brann Terrance Moore Christi Shields
Leslie Kristof Will Armstead

Members Excused

Werner Bols

Administrative Staff Present/Teleconference:

Brian Bauer Tracey McMorris Jennifer Eimann
Luis Bello

Call to Order:

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

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

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

Agenda Item 3 - Review and Approve Financial Statements - December and January:

Brian Bauer, President/CEO, provided a brief overview of the current financial status and recent grant developments for PY2025-2026.

CareerSource Research Coast is in line with the Individual Training Account (ITA) percentage spending requirement, currently at approximately 46%, exceeding the required 45% threshold. All grants are aligned with expenditures.

Additional RESEA funding was received in February, projected to carry the program through mid to-late April, with the expectation of receiving further funding through the end of the program year.

At the state's request, \$100,000 in Welfare Transition dollars was returned to support other boards.

Remaining funds are sufficient to carry through the end of the program year, including any extensions through August. Funding has also been set aside to run another Summer Welfare Transition Program.

With no further discussion, Christi Shields moved to approve the Financial Statements – December and January, as presented. Bob Cenk seconded the motion, which passed unanimously.



Agenda Item 4 - Review and Approve Workforce Innovation and Opportunity Act (WIOA) – Youth Program Eligibility and Service Provider Selection Policy:

Tracey McMorris, Vice President of Operations, COO, explained that the youth program is designed to serve young people who face barriers to employment. The policy establishes consistent standards for identifying eligible youth and conducting thorough, objective assessments to uncover each individual's unique needs and barriers, ensuring they receive comprehensive support.

A core component of the policy is the development of an Individual Services Strategy — a personalized plan that outlines each youth's goals and the specific objectives required to achieve them.

The policy also promotes cross-program coordination, strongly emphasizing co-enrollment not only with other WIOA programs but across the broader CareerSource Network. Additionally, it sets clear standards for selecting youth service providers, who must demonstrate:

- The capacity to deliver all 14 required program elements
- Strong community partnerships
- Compliance with federal requirements, performance expectations, and any additional board requirements

The policy was first presented to the Youth Council at their January 20th meeting, where it was approved and advanced to the Programs and Services Committee. Due to a lack of quorum at that meeting, it was brought before the Executive Committee for final approval.

With no further discussion, William Armstead moved to approve the Workforce Innovation and Opportunity Act (WIOA) - Youth Program Eligibility and Service Provider Selection Policy, as presented. Bob Cenk seconded the motion, which passed unanimously.

Agenda Item 5 - Review and Approve Workforce Innovation and Opportunity Act (WIOA) - On-the-Job Training Program Policy Revisions:

Tracey McMorris, Vice President of Operations, COO, shared the following information on the revisions made to this policy.

The State of Florida has received a waiver, effective through June 30, 2027, that increases reimbursement rates for employers participating in On-the-Job Training (OJT) programs.

Key Changes:

The waiver introduces two notable increases to reimbursement thresholds:

1. Standard to Enhanced Rate (up to 90%) – Previously, reimbursements could be raised from the standard 50% up to 75% based on participant or employer characteristics — such as participants with greater barriers to employment, smaller businesses, or minority-owned enterprises. Under this waiver, that ceiling is raised to 90%.
2. Full Reimbursement (up to 100%) – Employers whose worksite is located in, or participants who reside in, a designated Opportunity Zone are now eligible for 100% reimbursement.



Expected Impact:

These increases are intended to expand employer participation in OJT programs by making the financial incentive more attractive. The waiver runs through June 30, 2027, with the possibility of extension depending on outcomes and statewide expansion.

Additional Updates:

Minor revisions were also made to policy language and document links to improve clarity and make it easier for staff to navigate resources and follow updated procedures.

Brian Bauer added that the Opportunity Zones in Martin, Indian River and St. Lucie Counties:

Martin: Indiantown/Rio pocket (located in East Stuart near the Indian Street.

Indian River: Sebastian at the intersection west of I-95 on Route 60, near the CVS.

St Lucie County: Fort Pierce, just east of Okeechobee Rd on US-1. The group confirmed Fort Pierce has only one such zone.

Mr. Bauer expressed particular enthusiasm about Indiantown, noting significant activity there and looking forward to engaging with the local community about potential opportunities.

With no further discussion, Christie Shields moved to approve the Workforce Innovation and Opportunity Act (WIOA) - On-the-Job Training Program Policy Revisions, as presented. William Armstead seconded the motion, which passed unanimously.

Agenda Item 6 - Review and Approve Workforce Innovation and Opportunity Act (WIOA) – Business Engagement and Economic Development Support Policy:

Tracey McMorris, Vice President of Operations, COO, stated that this is a newly developed local policy, created in response to Florida's Career Source Policy 125, which formalizes how the organization services employers and economic development partners.

While many of these practices were already in place — including a business engagement procedure established two years ago, the policy creates a standardized approach across the board. A key component is conducting needs assessments with businesses to understand their challenges and priorities before presenting programs and services, rather than leading with a broad product pitch.

The policy also establishes expectations for boards to collaborate more effectively with economic development partners, ensuring businesses are served as efficiently as possible.

Youth Services & Partnership Expansion

A related discussion centered on expanding the reach of youth services by eliminating duplication among community partners. The committee identified that this provides an opportunity to divide responsibilities based on each organization's strengths.

Rebuilding the partnership with St. Lucie County School District was also highlighted as a priority. A recent meeting with district representatives and Mr. Bauer covered WIOA Youth programming and ways to strengthen collaboration, particularly around summer success initiatives that had previously lost momentum. The committee agreed that a formal follow-up meeting would be a productive next step, with an MOU framed as a natural bridge to reestablish that relationship.



With no further discussion, William Armstead moved to approve the Workforce Innovation and Opportunity Act (WOA) - Business Engagement and Economic Development Support Policy, as presented. Terrance Moore seconded the motion, which passed unanimously.

Agenda Item 7 - Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Emergency Response and Disaster Recovery Policy:

Tracey McMorris, Vice President of Operations, COO, stated that CareerSource Florida has developed a new comprehensive policy replacing the previously sunset disaster recovery policy. The updated policy significantly expands coverage to include emergency response protocols and organizational preparedness expectations.

Key components of the new policy include:

- Emergency office closure procedures – Defined protocols for notifying the state and internal team members during emergencies.
- Continuity of Operations Plan (COOP) – Organizations are now required to develop and maintain a formal COOP.
- Cybersecurity and data protection – Explicit expectations have been incorporated to address data security during disruptions.
- Emergency management coordination – Guidelines for partnering with external emergency management agencies.
- Dislocated Worker Grants – This section remains largely unchanged and consistent with the prior policy.

What is new is the emphasis on emergency response readiness and the formal COOP requirement. The policy is designed to ensure organizations are prepared, accountable, and audit-defensible – particularly important given that dislocated worker grants are among the most heavily regulated and audited funding streams due to the flexibility in participant enrollment and partner engagement, which can create vulnerability to fraud.

Overall, the policy strengthens fiscal and audit compliance posture across the board.

With no further discussion, Bob Cenk moved to approve the Workforce Innovation and Opportunity Act (WOA) - Emergency Response and Disaster Recovery Policy, as presented. Terrance Moore seconded the motion, which passed unanimously.

Agenda Item 8 - Review and Approve Local Targeted Occupations List (LTOL) for 4th Quarter - PY2025-2026:

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

No changes were made to the LTOL - there were no deletions, and all other occupations remain the same.



With no further discussion, Bob Cenk moved to approve the Local Targeted Occupations List (LTOL) for 4th Quarter, as presented. Leslie Kristof seconded the motion, which passed unanimously.

Agenda Item 9 - Review and Approve Application for Subsequent Local Workforce Development Area (LWDA) Designation - Program Years 2026 and 2027:

Brian Bauer, President/CEO, explained that it is time to submit our required bi-annual Local Workforce Area Designation to the state. Under WIOA, the governor must designate local workforce development areas every two years, and this submission is how we demonstrate continued eligibility to operate.

Mr. Bauer further explained that to qualify, the LWDB must show fiscal responsibility and successful performance. Our performance metrics — negotiated with the state and federal partners — are included in your packet on page 52 and reflect that we have met our Primary Indicators of Performance.

Key deadline: The submission is due to the state by March 23, 2026, which falls before our next board meeting in April. Staff is requesting the Executive Committee's approval today, so that we can meet the deadline. The item will be brought to the full board at the April 29, 2026, meeting, for the record.

Additionally, the Treasure Coast Workforce Consortium will be meeting to approve this item on Tuesday, March 17, 2026. All three county commissioners will attend.

With no further discussion, Terrance Moore moved to approve the Application for Subsequent Local Workforce Development Area (LWDA) Designation - Program Years 2026 and 2027, as presented. Bob Cenk seconded the motion, which passed unanimously.

Agenda Item 10 - Review and Approve Extension of Timeline for Workforce Innovation and Opportunity (WIOA) - Youth Program Request for Proposal (RFP) RFP # 26-001-YWS:

Brian Bauer, President/CEO, requests that the Executive Committee grant an extension for the public response period on the current RFP. The original 30-day response deadline was March 6th. The committee is being asked to approve a three-week extension through the end of March.

The purpose of the extension is to allow additional time to solicit more proposals beyond those already received. Leadership noted that the project timeline has sufficient flexibility to accommodate the extension without impacting key milestones, including executive review, board approval, and contract execution.

With no further discussion, Leslie Kristof moved to approve the Extension of Timeline for Workforce Innovation and Opportunity (WIOA) - Youth Program Request for Proposal (RFP) RFP # 26-001-YWS:, as presented. William Armstead seconded the motion, which passed unanimously.

Agenda Item 11 - Primary Indicators of Performance - 2nd Quarter - PY 2025-2026:

Brian Bauer, President/CEO, presented the Primary Indicators of Performance for the 2nd Quarter of PY 2025-2026. Mr. Bauer explained that the areas highlighted in blue reflect that performance goals exceeded (greater than 100% of negotiated). Likewise, goals highlighted in green show that performance goals were met (90-100% negotiated), and those reflected in yellow still need to be met (less than 90% of negotiated) by CSRC.



The numbers reflected in all report categories show that the LWDB 20 has either met or exceeded all performance goals except in the following Categories:

Dislocated Worker - Median Wage 2nd Qtr After Exit Youth - Credential Attainment Rate

Mr. Bauer stated that staff had worked hard to meet the negotiated performance targets and that strategic, operational steps would ensure all performance goals are met by qualifying participants as adults and improving real-time data.

Mr. Bauer pointed out that while the dislocated worker program shows underperformance in median wage metrics, we are exceeding targets in credential attainment and measurable skills gains. The Department of Commerce evaluates overall program scores rather than individual metrics, so we don't anticipate facing an improvement plan.

For youth programs, credential attainment rates are close to the target (87.79% actual vs. 90% goal). However, projections suggest we may fall short. This gap stems from serving more out-of-school youth, who face greater barriers, including disengagement and mental health challenges. Additionally, staff incorrectly recorded GED services when youth entered labs rather than when they enrolled in actual courses. These issues have been corrected.

To improve future performance, we're shifting focus toward in-school youth, who don't face GED completion challenges. Our upcoming youth services RFP will require vendors to fully utilize Florida's waiver, allowing 50% in-school youth enrollment. Since youth programs exceed targets in other performance metrics, these strengths will offset the credential attainment shortfall in the overall program score.

Agenda Item 12 - Local Workforce Development Board Membership Composition and Certification:

Brian Bauer, President/CEO, explained that an additional bi-annual requirement due to the state on March 23, 2026, is our board membership and certification.

The LWDB is maintaining compliance with required board membership standards. While open seats may prompt further discussion, our submission will reflect what was reviewed during our audit, which we passed. We will be certifying the same information from that audit for the state.

Agenda Item 13 - Letter Grade - Performance Update 1st Quarter - PY 2024-2025:

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



Mr. Bauer stated that the organization received its first quarter letter grades for FY25-26. This quarter marked the first time two previously extra-credit metrics — tied to TANF and SNAP — were reclassified as required metrics.

As a result, the overall grade dropped from an A to a B, coming in at 86.3, just 0.7 points short of a B+ (87.0). Leadership noted awareness of the issue and indicated they are actively monitoring it.

This downward trend was not isolated — other organizations also saw their grades decline due to the same reclassification. The added requirement of the TANF and SNAP metrics appears to have had a broad impact across the board.

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

Brian Bauer, President/CEO, presented the following update regarding board membership:

Discussion:

The committee addressed the current state of board vacancies, noting that four seats are presently unfilled. The following vacancies were identified:

1. Private Sector (Haas) – One private sector seat is opening as the current member is scheduled to conclude his board term at the end of the current program year.
2. Indian River County EDC – This seat remains in a holding pattern pending the hiring of a successor following the unexpected passing of Mark Litton. No action can be taken until the county EDC fills the position.
3. Private Business (David Bean/Walmart Distribution) – This seat was vacated following the departure of David Bean, who represented Walmart Distribution. A prospective replacement has been identified; however, consistent communication with the individual has proven difficult. It was suggested that a meeting be arranged with Will and other stakeholders to pursue additional private business candidates if this outreach does not progress.
4. Additional Vacancy – A fourth vacancy was referenced, with the existing candidate pipeline noted as exhausted.

Action Items:

- Intensify recruitment efforts over the next 30 to 45 days to fill vacancies.
- Bring membership nominations before the consortium in June in advance of the new program year.
- Explore potential candidates from the Business Development Board (BDB) and other regional economic development entities currently represented on the board.
- Coordinate a meeting with William Armstead and relevant stakeholders to identify and pursue new private sector candidates.

Agenda Item 15 - Adjournment:

With no further items to discuss, a motion was made by Jim Brann to adjourn the meeting, seconded by Christi Shields. The motion passed unanimously, and the meeting was adjourned at 9:00 a.m.



BOARD SECRETARY CERTIFICATION

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

Brian Bauer
Secretary

Date

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

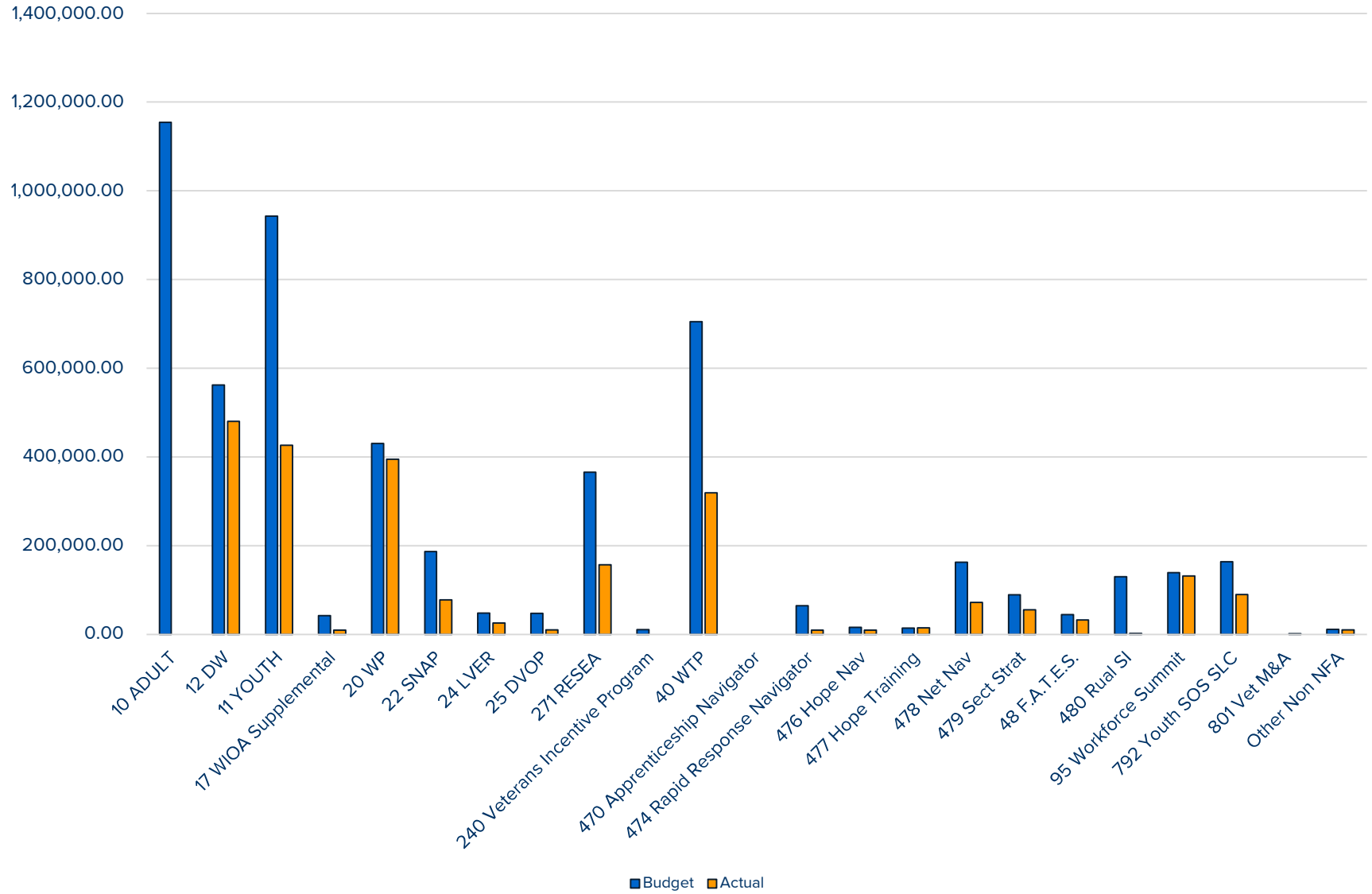
Agenda Item 6di

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																
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		\$ -	\$ -	\$ 55,821	\$ -	\$ 79,990	\$ 40,000	\$ 16,346	\$ 1,869	\$ 42,247	\$ -	\$ 187,598	\$ -	\$ 9,000	\$ -	\$ -
PY 25-26 Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 26-27		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 24-25		\$ -	\$ 419,940	\$ 322,276	\$ 28,608	\$ 300,430	\$ 37,812	\$ 6,577	\$ 4,248	\$ 106,698	\$ -	\$ 125,198	\$ -	\$ -	\$ 9,686	\$ 14,620
Total DEO Grant Funding		\$ -	\$ 419,940	\$ 322,276	\$ 28,608	\$ 300,430	\$ 37,812	\$ 6,577	\$ 4,248	\$ 106,698	\$ -	\$ 125,198	\$ -	\$ 9,000	\$ 9,686	\$ 14,620
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 11,095	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ -	\$ 419,940	\$ 322,276	\$ 28,608	\$ 300,430	\$ 37,812	\$ 6,577	\$ 4,248	\$ 4,248	\$ 106,698	\$ 11,095	\$ 125,198	\$ -	\$ 9,000	\$ 9,686	\$ 14,620
% of Total Budgeted Funding Received		0.00%	74.56%	34.12%	68.03%	69.70%	20.13%	13.63%	8.84%	28.99%	100.00%	17.64%	0.00%	13.85%	61.18%	0.00%
EXPENDITURES																
Administrative																
Salaries and Benefits	\$ 178,448	\$ -	\$ 49,310	\$ 10,880	\$ 1,262	\$ 70,415	\$ 8,374	\$ 2,755	\$ 1,113	\$ 20,714	\$ -	\$ 42,502	\$ -	\$ 937	\$ 1,053	\$ 1,847
General and Administrative	\$ 87,521	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (265,969)	\$ 84,664	\$ 5,416	\$ 10,880	\$ -	\$ 27,694	\$ 10,599	\$ 2,755	\$ 1,440	\$ 20,714	\$ -	\$ 42,502	\$ 117	\$ 1,287	\$ 2,546	\$ 5,197
Reclassification	\$ -	\$ (84,664)	\$ 43,895	\$ -	\$ 1,262	\$ 42,721	\$ (2,225)	\$ -	\$ (327)	\$ -	\$ -	\$ -	\$ (117)	\$ (350)	\$ (1,492)	\$ (3,351)
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ (0)	\$ -	\$ 430,920	\$ 415,584	\$ 8,293	\$ 324,623	\$ 69,547	\$ 22,718	\$ 8,909	\$ 136,423	\$ -	\$ 276,510	\$ -	\$ 8,452	\$ 8,633	\$ 12,773
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 351,957	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 110,533	\$ 263,302	\$ 16,201	\$ 10,917	\$ -	\$ 31,931	\$ 32,473	\$ 6,328	\$ 2,673	\$ 98,230	\$ -	\$ 135,851	\$ 435	\$ 6,651	\$ 12,892	\$ 19,094
Contract Labor	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 13,565	\$ -	\$ -	\$ -	\$ -	\$ 35,018	\$ -	\$ -	\$ -	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,650	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ 325	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,090	\$ -	\$ -	\$ -	\$ -
Support Services ITA	\$ -	\$ 11,194	\$ 2,011	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 326	\$ -	\$ -	\$ -	\$ 100
Training-ITA/OST/TAA	\$ -	\$ 73,731	\$ 7,410	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 30	\$ -	\$ -	\$ -	\$ 1,419
Training-OJT	\$ -	\$ 77,630	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,359
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 1,422	\$ 2,609	\$ 406	\$ 546	\$ -	\$ 263	\$ 361	\$ 2,846	\$ 2,021	\$ 1,053	\$ -	\$ 1,454	\$ -	\$ 20	\$ 86	\$ 109
One Stop Shared Costs	\$ 7,376	\$ 45,909	\$ 2,675	\$ 2,110	\$ -	\$ 26,099	\$ 8,351	\$ 11,342	\$ 5,319	\$ 19,548	\$ -	\$ 30,173	\$ 532	\$ 1,107	\$ 2,394	\$ 5,017
Other Operating Expenses	\$ 9,241	\$ 24,649	\$ 3,003	\$ 44,795	\$ -	\$ 111,337	\$ 9,674	\$ 871	\$ 742	\$ 7,579	\$ -	\$ 49,373	\$ 29	\$ 52	\$ 122	\$ 275
Allocated Program Indirect	\$ (128,571)	\$ 40,927	\$ 2,618	\$ 5,260	\$ -	\$ 13,388	\$ 5,123	\$ 1,332	\$ 696	\$ 10,013	\$ -	\$ 20,545	\$ 57	\$ 622	\$ 1,231	\$ 2,515
Reclassification	\$ -	\$ (540,276)	\$ 396,594	\$ -	\$ 8,293	\$ 141,605	\$ -	\$ -	\$ (2,542)	\$ -	\$ -	\$ -	\$ (1,053)	\$ -	\$ (8,093)	\$ (21,115)
Total Expenditures	\$ 0	\$ -	\$ 480,230	\$ 426,464	\$ 9,555	\$ 395,038	\$ 77,921	\$ 25,474	\$ 10,022	\$ 157,136	\$ -	\$ 319,012	\$ -	\$ 9,388	\$ 9,686	\$ 14,620
Funding Over/(under) expenditures	\$ 0	\$ -	\$ (60,290)	\$ (104,188)	\$ 19,053	\$ (94,607)	\$ (40,109)	\$ (18,896)	\$ (5,774)	\$ (50,438)	\$ 11,095	\$ (193,814)	\$ -	\$ (388)	\$ -	\$ -
YTD % of Budgeted Funds Expended		0.00%	85.26%	45.15%	22.72%	91.65%	41.49%	52.80%	20.87%	42.69%	0.00%	44.95%	0.00%	14.44%	61.18%	0.00%

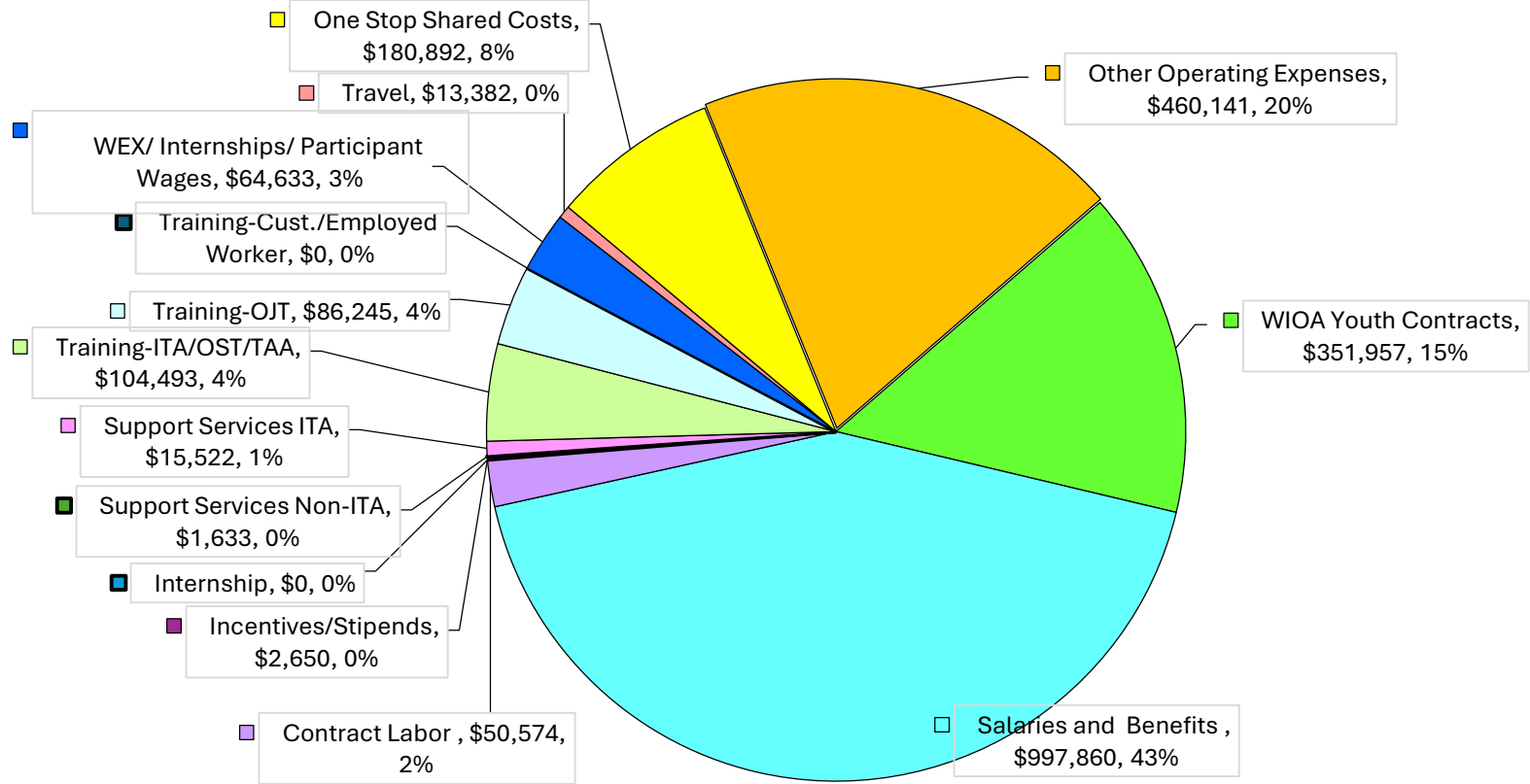
LWDB 20
Summary of Funding and Expenditures
As of December 31, 2025

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	\$ 61,500	\$ -	\$ 2,500	\$ -	\$ 1,405	\$ 128,000	\$ -	\$ 724,977	\$ 6,310,905	\$ 5,585,929	11.488%
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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,376,094	\$ 2,034,681	\$ 658,587	67.632%
Total DEO Grant Funding	\$ 98,700	\$ 61,500	\$ -	\$ 2,500	\$ -	\$ 1,405	\$ 128,000	\$ -	\$ 2,101,071	\$ 5,267,224	\$ 3,166,153	39.890%
OTHER NON DEO REVENUES	\$ -	\$ -	\$ 50,461	\$ -	\$ 80,651	\$ -	\$ -	\$ 6,079	\$ 148,286	\$ 227,008	\$ 78,722	65.322%
TOTAL	\$ 98,700	\$ 61,500	\$ 50,461	\$ 2,500	\$ 80,651	\$ 1,405	\$ 128,000	\$ 6,079	\$ 2,249,357	\$ 5,494,231	\$ 3,244,874	40.940%
% of Total Budgeted Funding Received	60.34%	68.33%	112.82%	0.00%	48.88%	0.00%	91.43%	52.64%	40.94%			
EXPENDITURES									PY 25-26 Actual	PY 25-26 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ 11,630	\$ 5,840	\$ 4,570	\$ 202	\$ 12,604	\$ -	\$ 18,549	\$ 1,412	\$ 265,969	\$ 548,372	\$ 282,403	48.50%
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 178,448	\$ 402,460	\$ 224,011	44.34%
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 87,521	\$ 145,912	\$ 58,391	59.98%
Allocated Indirect Costs	\$ 8,392	\$ 4,442	\$ 4,570	\$ 292	\$ 12,604	\$ -	\$ 18,549	\$ 1,309	\$ 0	\$ (0)	\$ (0)	
Reclassification	\$ 3,238	\$ 1,398	\$ -	\$ (90)	\$ -	\$ -	\$ -	\$ 103	\$ (0)	\$ -	\$ (0)	
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Program Training	\$ 60,426	\$ 49,798	\$ 28,044	\$ 1,850	\$ 77,073	\$ 1,405	\$ 113,176	\$ 8,855	\$ 2,064,012	\$ 4,784,310	\$ 2,720,298	43.1%
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 351,957	\$ 750,000	\$ 398,043	46.9%
Salaries and Benefits	\$ 43,272	\$ 19,747	\$ 1,680	\$ 1,592	\$ 3,382	\$ -	\$ 2,228	\$ -	\$ 819,412	\$ 2,261,011	\$ 1,441,599	36.2%
Contract Labor	\$ -	\$ -	\$ -	\$ -	\$ 1,991	\$ -	\$ -	\$ -	\$ 50,574	\$ 9,347	\$ (41,227)	541.1%
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,650	\$ 14,198	\$ 11,548	18.7%
Support Services Non-ITA	\$ -	\$ -	\$ 50	\$ -	\$ -	\$ -	\$ -	\$ 168	\$ 1,633	\$ 10,000	\$ 8,367	16.3%
Support Services ITA	\$ -	\$ -	\$ 1,891	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 15,522	\$ 54,895	\$ 39,373	28.3%
Training-ITA/OST/TAA	\$ -	\$ -	\$ 21,903	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 104,493	\$ 331,330	\$ 226,837	31.5%
Training-OJT	\$ -	\$ 3,256	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 86,245	\$ 320,746	\$ 234,500	26.9%
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 64,633	\$ -	\$ -	\$ 64,633	\$ 104,448	\$ 39,815	61.9%
Travel	\$ 75	\$ 100	\$ 4	\$ -	\$ -	\$ -	\$ -	\$ 8	\$ 13,382	\$ 16,190	\$ 2,808	82.7%
One Stop Shared Costs	\$ 7,226	\$ 3,239	\$ 291	\$ 116	\$ 189	\$ 1,405	\$ -	\$ 474	\$ 180,892	\$ 402,021	\$ 221,130	45.0%
Other Operating Expenses	\$ 325	\$ 245	\$ 16	\$ 1	\$ 786	\$ -	\$ 104,209	\$ 5,294	\$ 372,620	\$ 510,123	\$ 137,503	73.0%
Allocated Program Indirect	\$ 4,057	\$ 2,147	\$ 2,209	\$ 141	\$ 6,093	\$ -	\$ 8,967	\$ 630	\$ 0	\$ 0	\$ -	
Reclassification	\$ 5,472	\$ 21,063	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 52	\$ 0	\$ -	\$ 0	
Total Expenditures	\$ 72,056	\$ 55,638	\$ 32,614	\$ 2,052	\$ 89,677	\$ 1,405	\$ 131,725	\$ 10,267	\$ 2,329,981	\$ 5,332,678	\$ 3,002,697	43.7%
Funding Over/(under) expenditures	\$ 26,644	\$ 5,862	\$ 17,847	\$ 448	\$ (9,026)	\$ -	\$ (3,725)	\$ (4,189)	\$ (80,624)			
YTD % of Budgeted Funds Expended	44.05%	61.82%	72.92%	1.58%	54.35%	45.45%	94.09%	88.92%	42.41%			

Budget to Actual by Program



PY 25-26 Expenditures by Category



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

Workforce Development Board of the Treasure Coast, Inc.
Statement of Financial Position
As of 12/31/2025

Assets

Current assets

Cash - Accounts Payable	5,671.90
Cash - Payroll	132,799.12
Cash - Business Checking W/Int.	314,507.87
Accounts Receivable Customers	111.03
Accounts Receivable - Other	1,522.73
Prepaid Expenses	29,368.21
Due TO/ Due FROM	2,866.91
Total Current assets	486,847.77

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

570,828.25

Liabilities & Net Assets

Current Liabilities

Accounts Payable	151,177.06
Payroll Accounts Payable	975.69
Accrued Expenses	93,244.29
Federal Withholding Tax	(0.01)
FICA Payable	0.60
SUTA Payable	49.13
Principal Insurance	251.92
Health Insurance Payable	1,990.35
AFLAC Payable	53.80
Legal Shield	530.49
Workers Comp Payable	5,944.22
Retirement Withholding	(6,060.41)
Accrued Leave	80,222.32
Sick Leave Liability	44,265.49
Refundable Advances	1,935.77
Deferred Revenue	1,353.75
Total Current Liabilities	375,934.46

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	(837,688.41)
Total Net Assets	194,893.79
Total Liabilities & Net Assets	<u><u>570,828.25</u></u>

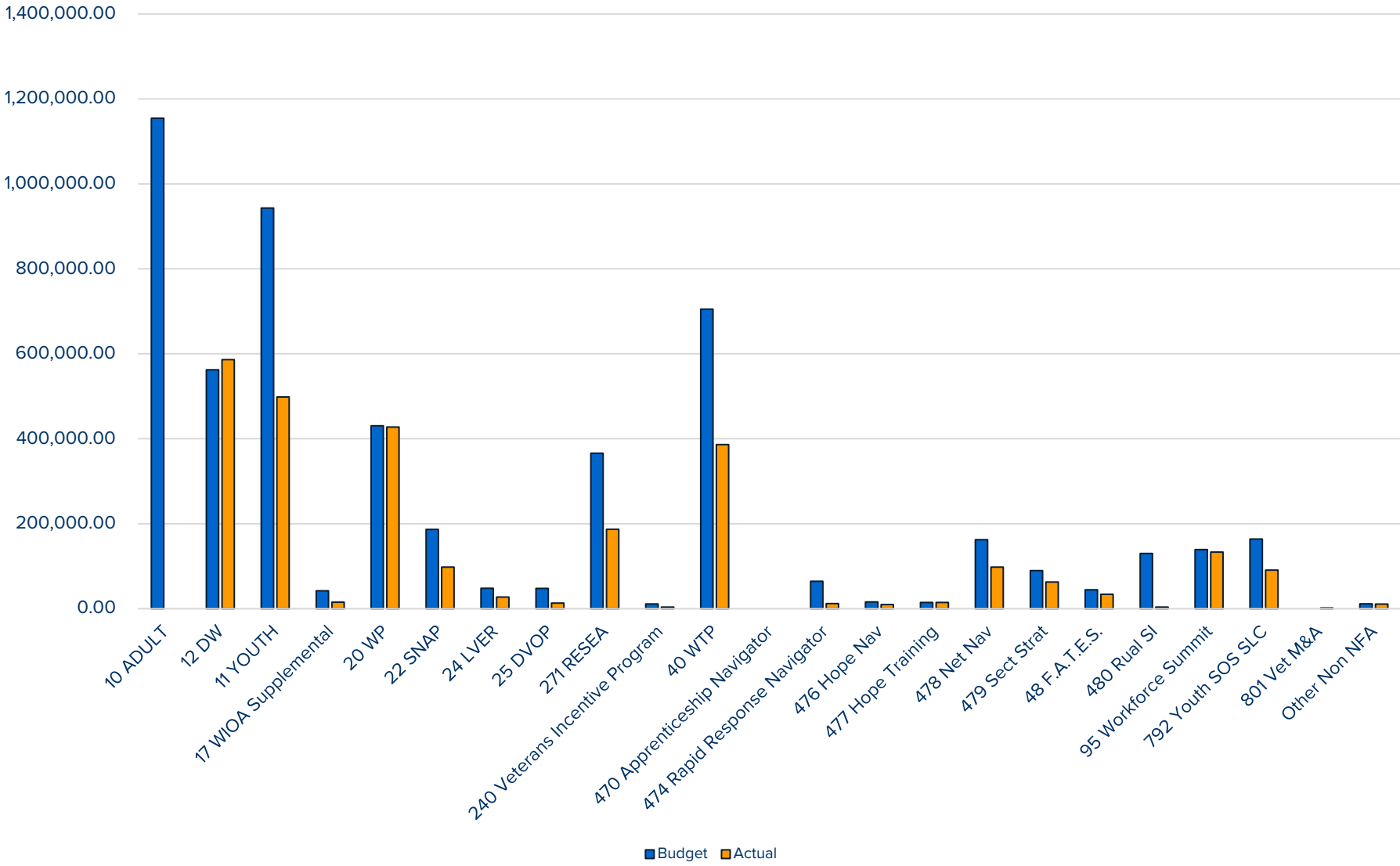
LWDB 20
Summary of Funding and Expenditures
As of January 31, 2026

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																
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		\$ -	\$ -	\$ 100,821	\$ -	\$ 94,990	\$ 42,100	\$ 19,024	\$ 5,775	\$ 67,247	\$ -	\$ 263,923	\$ -	\$ 10,500	\$ -	\$ -
PY 25-26 Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 26-27		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 24-25		\$ -	\$ 539,940	\$ 322,276	\$ 28,608	\$ 300,430	\$ 37,812	\$ 6,577	\$ 4,248	\$ 106,698	\$ -	\$ 125,198	\$ -	\$ -	\$ 9,686	\$ 14,620
Total DEO Grant Funding		\$ -	\$ 539,940	\$ 423,097	\$ 28,608	\$ 395,420	\$ 79,912	\$ 25,601	\$ 10,024	\$ 173,945	\$ -	\$ 389,121	\$ -	\$ 10,500	\$ 9,686	\$ 14,620
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 11,095	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ -	\$ 539,940	\$ 423,097	\$ 28,608	\$ 395,420	\$ 79,912	\$ 25,601	\$ 10,024	\$ 173,945	\$ 11,095	\$ 389,121	\$ -	\$ 10,500	\$ 9,686	\$ 14,620	
% of Total Budgeted Funding Received		0.00%	95.87%	44.79%	68.03%	91.74%	42.55%	53.07%	20.87%	47.25%	100.00%	54.83%	0.00%	16.15%	61.18%	0.00%
EXPENDITURES																
Administrative	\$ -	\$ -	\$ 61,723	\$ 12,261	\$ (9,131)	\$ 94,752	\$ 10,491	\$ 3,092	\$ 1,478	\$ 25,608	\$ 528	\$ 53,382	\$ -	\$ 1,219	\$ 1,053	\$ 1,847
Salaries and Benefits	\$ 225,274	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 94,471	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (319,745)	\$ 105,856	\$ 5,936	\$ 12,261	\$ -	\$ 29,863	\$ 13,936	\$ 3,092	\$ 1,805	\$ 25,608	\$ 528	\$ 53,382	\$ 123	\$ 1,739	\$ 2,668	\$ 5,443
Reclassification	\$ -	\$ (105,856)	\$ 55,787	\$ -	\$ (9,131)	\$ 64,889	\$ (3,445)	\$ -	\$ (327)	\$ -	\$ -	\$ -	\$ (123)	\$ (520)	\$ (1,615)	\$ (3,596)
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ -	\$ 524,449	\$ 486,097	\$ 24,293	\$ 332,769	\$ 87,402	\$ 24,287	\$ 11,603	\$ 161,221	\$ 3,092	\$ 332,768	\$ -	\$ 10,895	\$ 8,633	\$ 12,773
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 413,746	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 138,593	\$ 335,335	\$ 17,474	\$ 12,967	\$ -	\$ 34,703	\$ 44,868	\$ 6,676	\$ 3,369	\$ 117,839	\$ -	\$ 179,234	\$ 435	\$ 8,650	\$ 12,892	\$ 19,094
Contract Labor	\$ -	\$ 4,491	\$ -	\$ -	\$ -	\$ -	\$ 14,966	\$ -	\$ -	\$ -	\$ -	\$ 35,931	\$ -	\$ -	\$ -	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,650	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ 325	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,090	\$ -	\$ -	\$ -	\$ -
Support Services ITA	\$ -	\$ 11,194	\$ 2,011	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 326	\$ -	\$ -	\$ -	\$ 100
Training-ITA/OST/TAA	\$ -	\$ 73,731	\$ 7,410	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 30	\$ -	\$ -	\$ -	\$ 1,419
Training-OJT	\$ -	\$ 87,948	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,359
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 1,457	\$ 2,893	\$ 425	\$ 553	\$ -	\$ 270	\$ 438	\$ 2,932	\$ 2,022	\$ 1,120	\$ -	\$ 1,708	\$ -	\$ 26	\$ 86	\$ 109
One Stop Shared Costs	\$ 8,892	\$ 53,219	\$ 2,794	\$ 2,296	\$ -	\$ 29,574	\$ 9,704	\$ 12,180	\$ 6,996	\$ 21,596	\$ -	\$ 34,581	\$ 532	\$ 1,298	\$ 2,394	\$ 5,017
Other Operating Expenses	\$ 10,723	\$ 26,007	\$ 3,051	\$ 50,412	\$ -	\$ 111,705	\$ 10,467	\$ 955	\$ 857	\$ 7,879	\$ 2,828	\$ 50,561	\$ 29	\$ 53	\$ 122	\$ 275
Allocated Program Indirect	\$ (159,664)	\$ 52,859	\$ 2,964	\$ 6,123	\$ -	\$ 14,912	\$ 6,959	\$ 1,544	\$ 901	\$ 12,787	\$ 263	\$ 26,656	\$ 61	\$ 868	\$ 1,332	\$ 2,719
Reclassification	\$ -	\$ (648,002)	\$ 488,320	\$ -	\$ 24,293	\$ 141,605	\$ -	\$ -	\$ (2,542)	\$ -	\$ -	\$ -	\$ (1,058)	\$ -	\$ (8,194)	\$ (21,319)
Total Expenditures	\$ 0	\$ -	\$ 586,172	\$ 498,358	\$ 15,162	\$ 427,520	\$ 97,893	\$ 27,379	\$ 13,081	\$ 186,829	\$ 3,619	\$ 386,150	\$ -	\$ 12,114	\$ 9,686	\$ 14,620
Funding Over/(under) expenditures	\$ 0	\$ -	\$ (46,231)	\$ (75,261)	\$ 13,445	\$ (32,100)	\$ (17,981)	\$ (1,778)	\$ (3,058)	\$ (12,883)	\$ 7,476	\$ 2,971	\$ -	\$ (1,614)	\$ -	\$ -
YTD % of Budgeted Funds Expended		0.00%	104.07%	52.76%	36.06%	99.19%	52.13%	56.75%	27.24%	50.75%	32.62%	54.42%	0.00%	18.64%	61.18%	0.00%

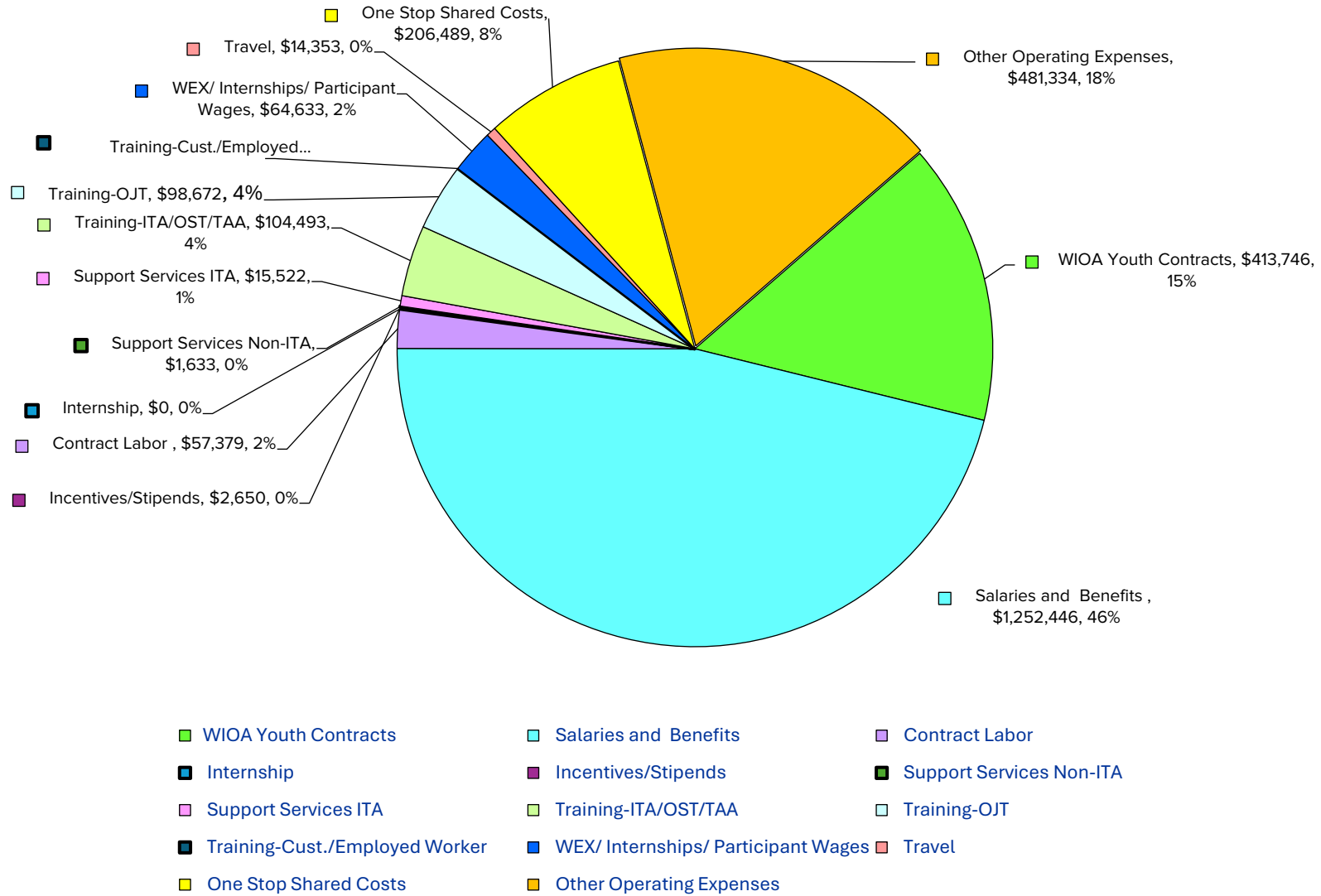
LWDB 20
Summary of Funding and Expenditures
As of January 31, 2026

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	\$ 69,300	\$ -	\$ 3,750	\$ -	\$ 1,686	\$ 130,720	\$ -	\$ 908,537	\$ 6,310,905	\$ 5,402,369	14.396%	
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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,496,094	\$ 2,034,681	\$ 538,587	73.530%	
Total DEO Grant Funding	\$ 98,700	\$ 69,300	\$ -	\$ 3,750	\$ -	\$ 1,686	\$ 130,720	\$ -	\$ 2,404,631	\$ 5,267,224	\$ 2,862,593	45.653%	
OTHER NON DEO REVENUES	\$ -	\$ -	\$ 50,461	\$ -	\$ 80,651	\$ -	\$ -	\$ 5,642	\$ 147,850	\$ 227,008	\$ 79,159	65.130%	
TOTAL	\$ 98,700	\$ 69,300	\$ 50,461	\$ 3,750	\$ 80,651	\$ 1,686	\$ 130,720	\$ 5,642	\$ 2,552,480	\$ 5,494,231	\$ 2,941,751	46.457%	
% of Total Budgeted Funding Received	60.34%	77.00%	112.82%	0.00%	48.88%	0.00%	93.37%	48.86%	46.46%				
EXPENDITURES										PY 25-26 Actual	PY 25-26 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ 15,632	\$ 6,345	\$ 4,912	\$ 371	\$ 13,211	\$ -	\$ 19,441	\$ 1,530	\$ 319,745	\$ 548,372	\$ 228,627	58.31%	
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 225,274	\$ 402,460	\$ 177,186	55.97%	
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 94,471	\$ 145,912	\$ 51,441	64.75%	
Allocated Indirect Costs	\$ 12,265	\$ 5,702	\$ 4,912	\$ 547	\$ 13,211	\$ -	\$ 19,441	\$ 1,427	\$ 0	\$ (0)	\$ (0)		
Reclassification	\$ 3,366	\$ 643	\$ -	\$ (175)	\$ -	\$ -	\$ -	\$ 103	\$ 0	\$ -	\$ 0		
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Program Training	\$ 82,154	\$ 56,504	\$ 28,970	\$ 3,289	\$ 77,577	\$ 1,686	\$ 113,917	\$ 9,225	\$ 2,393,604	\$ 4,784,310	\$ 2,390,706	50.0%	
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 413,746	\$ 750,000	\$ 336,254	55.2%	
Salaries and Benefits	\$ 60,977	\$ 23,082	\$ 2,304	\$ 2,868	\$ 3,382	\$ -	\$ 2,429	\$ -	\$ 1,027,172	\$ 2,261,011	\$ 1,233,839	45.4%	
Contract Labor	\$ -	\$ -	\$ -	\$ -	\$ 1,991	\$ -	\$ -	\$ -	\$ 57,379	\$ 9,347	\$ (48,032)	613.9%	
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,650	\$ 14,198	\$ 11,548	18.7%	
Support Services Non-ITA	\$ -	\$ -	\$ 50	\$ -	\$ -	\$ -	\$ -	\$ 168	\$ 1,633	\$ 10,000	\$ 8,367	16.3%	
Support Services ITA	\$ -	\$ -	\$ 1,891	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 15,522	\$ 54,895	\$ 39,373	28.3%	
Training-ITA/OST/TAA	\$ -	\$ -	\$ 21,903	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 104,493	\$ 331,330	\$ 226,837	31.5%	
Training-OJT	\$ -	\$ 5,364	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 98,672	\$ 320,746	\$ 222,074	30.8%	
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 64,633	\$ -	\$ -	\$ 64,633	\$ 104,448	\$ 39,815	61.9%	
Travel	\$ 188	\$ 111	\$ 6	\$ 2	\$ -	\$ -	\$ -	\$ 8	\$ 14,353	\$ 16,190	\$ 1,837	88.7%	
One Stop Shared Costs	\$ 8,954	\$ 3,586	\$ 348	\$ 146	\$ 189	\$ 1,686	\$ -	\$ 507	\$ 206,489	\$ 402,021	\$ 195,533	51.4%	
Other Operating Expenses	\$ 331	\$ 246	\$ 16	\$ 1	\$ 786	\$ -	\$ 104,209	\$ 5,348	\$ 386,862	\$ 510,123	\$ 123,260	75.8%	
Allocated Program Indirect	\$ 6,125	\$ 2,847	\$ 2,453	\$ 273	\$ 6,597	\$ -	\$ 9,708	\$ 712	\$ (0)	\$ 0	\$ -		
Reclassification	\$ 5,578	\$ 21,267	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 52	\$ (0)	\$ -	\$ (0)		
Total Expenditures	\$ 97,785	\$ 62,849	\$ 33,882	\$ 3,661	\$ 90,787	\$ 1,686	\$ 133,359	\$ 10,755	\$ 2,713,349	\$ 5,332,678	\$ 2,619,329	50.9%	
Funding Over/(under) expenditures	\$ 915	\$ 6,451	\$ 16,579	\$ 89	\$ (10,136)	\$ -	\$ (2,639)	\$ (5,113)	\$ (160,868)				
YTD % of Budgeted Funds Expended	59.78%	69.83%	75.75%	2.82%	55.02%	54.55%	95.26%	93.14%	49.39%				

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 1/31/2026

Assets

Current assets

Cash - Accounts Payable	5,671.91
Cash - Payroll	34,230.96
Cash - Business Checking W/Int.	200,059.63
Accounts Receivable Customers	111.03
Accounts Receivable - Other	1,522.73
Prepaid Expenses	22,186.99
Due TO/ Due FROM	2,585.91

Total Current assets 266,369.16

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 350,349.64

Liabilities & Net Assets

Current Liabilities

Accounts Payable	11,756.17
Accrued Expenses	88,451.17
Federal Withholding Tax	(0.01)
FICA Payable	0.60
SUTA Payable	898.41
Principal Insurance	260.80
Health Insurance Payable	1,220.33
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	593.75

Total Current Liabilities 235,699.66

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	(917,932.22)
Total Net Assets	114,649.98

Total Liabilities & Net Assets 350,349.64

AGENDA ITEM SUMMARY

Title	Workforce Innovation & Opportunity Act (WIOA) - Youth Program Eligibility and Service Provider Selection Policy
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Workforce Innovation and Opportunity Act/CareerSource Florida Administrative Policy P95 - WIOA Youth Program Eligibility and Service Provider Selection
Action Requested	Review and Approve the Workforce Innovation and Opportunity Act (WIOA) - Youth Program Eligibility and Service Provider Selection Policy
Background	In alignment with new policy guidance from CareerSource Florida, this local policy was developed to establish CareerSource Research Coast's (CSRC) framework and expectations for the design and delivery of youth services, including key program requirements, roles and responsibilities, and standards to ensure consistent implementation and compliance.
Staff Recommendations	Approve the WIOA Youth Program Eligibility and Service Provider Selection Policy
Supporting Material	WIOA Youth Program Eligibility and Service Provider Selection Policy Draft
Board Staff	Tracey McMorris Vice President of Operations/COO tmcmorris@careersourcerc.com (866) 482-4473 ext. 528

I. PURPOSE

To provide guidance to CareerSource Research Coast (CSRC) staff to support the development and implementation of aligned, effective youth programs that promote high-quality outcomes and ensure compliance with applicable state and federal requirements.

II. BACKGROUND

Supporting youth with barriers to employment is a key priority within the workforce system. Achieving strong outcomes requires proactive, coordinated partnerships that connect youth to training, resources, and supportive services leading to high-quality employment. These efforts help strengthen self-sufficiency while also meeting the workforce needs of local employers.

III. LOCAL POLICY:

A. WIOA Youth Eligibility Criteria

CareerSource Research Coast (CSRC) must actively pursue outreach to potentially eligible youth and ensure that youth enrolled in the WIOA Youth Program meet eligibility criteria as defined in WIOA Sections 129(a)(1) and, [20 CFR 681.200 - 681.220](#). Eligibility determinations are based, in part, on the following factors:

- Eligibility criteria as an out-of-school youth (OSY) or in-school youth (ISY)
- School status determination
- Identified barrier(s)

CSRC must ensure that education and local youth-focused workforce development systems are coordinated and designed to increase and expand pathways into work-based learning activities, especially registered apprenticeships and pre-apprenticeship programs, that meet current industry needs. Programs should be designed to efficiently assist youth into, and persist in, high-wage, high-demand, and high-skilled occupations and provide access to an aligned and expanding array of apprenticeship and pre-apprenticeship options. Programs for youth should be focused on demonstrated industry need, career-relevant training, and increasing in-demand employment outcomes. Youth program participant data on pre-apprenticeship and apprenticeship enrollment, outreach, and completion should be regularly measured, tracked, and shared.

B. Enrollment and Assessment

Youth can self-register in Employ Florida, however they cannot self-enroll in a WIOA Youth program. CSRC staff must ensure that youth are registered in Employ Florida and determine eligibility as quickly as possible and before enrollment. The enrollment process includes eligibility determination, objective assessment, development of an Individual Service Strategy (ISS), and participation in any of the 14 WIOA Youth program elements outlined in [20 CFR 681.460](#). Once an individual is determined to be eligible for the WIOA Youth program, staff are required to complete a WIOA Youth program application in Employ Florida.

Objective assessments evaluate academic and skill levels, career readiness, and service needs. Assessments may include formal tests, interviews, observations, or file reviews, and must accommodate youth with disabilities. Assessments from other programs completed within the past six months may be used. Youth are considered participants only after receiving one of the 14 program elements listed in [20 CFR 681.460](#).

The ISS must be tailored to the youth's needs and include assessment results and education and employment goals aligned with career pathways that are designed to lead to employment within in-demand industry sectors. It must align with at least one WIOA performance indicator and include at least

one of the 14 program elements. Existing ISS documents from other programs may be used if completed within the past six months and sufficient to meet WIOA requirements.

Staff must complete the objective assessment in Employ Florida using the Objective Assessment Summary Wizard and ISS using the Individual Service Strategy Wizard within Employ Florida based on technical guidance issued by FloridaCommerce.

Co-enrollment in WIOA programs is highly encouraged and depends on each youth's eligibility, individual service needs, and career readiness, determined through assessments of skills, work experience, literacy, and support needs. Youth aged 18 to 24 may be co-enrolled in the WIOA Youth and Adult programs if they meet eligibility for both. Youth may qualify for WIOA adult services if they meet WIOA Adult eligibility requirements and need intensive youth services as well as adult training related to their career pathway. For co-enrolled participants, staff must determine the appropriate services from each program, identify the funding stream for each service in Employ Florida, and ensure services are not duplicated consistent with applicable state and federal law. CSRC must ensure that services for non-eligible youth are funded through partner programs.

CSRC should work closely with local businesses, as well as community and WIOA partners, to serve youth.

C. Use of Federal Funds to Provide Food, Beverage, or Dining Activities

CSRC may use state and WIOA funds to provide food and beverages for youth enrolled and participating in youth workforce programs provided that such expenditures adhere to technical assistance and guidance issued by FloridaCommerce.

D. WIOA Youth Service Provider Selection and Procurement

CSRC may deliver youth services directly or award grants and contracts through a competitive procurement process, as required by WIOA Section 123. Direct provision must be cost-effective and comply with governance standards in [Workforce Policy G110 – Local Workforce Development Area Board Governance](#). Selection through procurement and the execution of contractual arrangements must include specific and measurable deliverables designed to drive the effective, efficient, and aligned delivery of services, include outreach and partnership objectives, and be consistent with issued technical assistance and guidance from FloridaCommerce.

Selected providers must, at minimum:

- demonstrate the ability to offer all 14 required program elements,
- coordinate with community partners,
- offer services at a reasonable cost with a clear budget,
- show knowledge of WIOA requirements,
- have strong community and business linkages,
- meet or exceed CSRC performance indicators,
- comply with reporting requirements,
- be legally established for at least six months,
- hold a current business license,
- disclose any pending legal actions, and
- must not have been found at fault in criminal, civil, or administrative proceedings.

AGENDA ITEM SUMMARY

Title	Workforce Innovation and Opportunity Act (WIOA) - On-the-Job Training Program Policy Revisions
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Public Law 113-128, Workforce Innovation and Opportunity Act, 20 CFR 680.700 - 680.840, 20 CFR 683.400, 20 CFR 683.410, Training and Employment Guidance Letter (TEGL) 19-16, 2 CFR Appendix II to Part 200, Contract Provisions for Non-Federal Entity Contracts Under Federal Awards, Chapter 445, Florida Statutes, CareerSource Florida Workforce Policy – Work-Based Training and Work-Based Learning Opportunities; CareerSource Florida Policy 009 – On-the-Job Training; Waiver of Workforce Innovation & Opportunity Act On-the-Job Training Reimbursement Limits;
Action Requested	Review and Approve Revisions to the WIOA On-the-Job-Training Policy
Background	<p>OJT helps employers cover the costs of training new employees. and allows participants to earn while they learn, acquire new skills, and enhance their financial independence. OJT is uniquely suited to help individuals facing employment barriers to gain a foothold in the workforce. Individuals must meet WIOA eligibility criteria to participate in OJT programs.</p> <p>On September 19, 2025, the U.S. Department of Labor approved a waiver to the federal OJT reimbursement limits through June 30, 2027. Effective for Program Years 2025 and 2026, this waiver allows local workforce development boards to reimburse employers up to 90 percent of participant wages, and up to 100 percent for employers located in or employing residents of designated Opportunity Zones. CSRC’s OJT policy has been updated accordingly</p>
Staff Recommendations	Approve Revisions to the WIOA On-the-Job-Training Policy
Supporting Material	WIOA On-the-Job-Training Policy
Board Staff	<p>Tracey McMorris Vice-President/COO tmcmorris@careesourcerc.com (866) 482-4473 ext. 528</p>



PURPOSE

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

REFERENCES

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

BACKGROUND:

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

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

POLICY:

On-the-Job Training (OJT) is paid subsidized job skills training that is provided by an employer during the initial term of employment. OJT is designed to ensure the participant acquires the employer-specific job skills necessary to secure and maintain employment and provides knowledge or skills essential to the full and adequate performance of the job. The training is limited in duration as appropriate to the occupation for which the participant is being trained and is not to exceed six (6) months. The employer is typically reimbursed 50% of the participant's wages during the OJT period, ~~although reimbursement may increase up to 75 or 100 percent based on certain criteria outlined below~~. This reimbursement is designed to offset the employer's costs for providing the job training and any necessary additional supervision.

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

I. Participant Eligibility

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

B. Prior to receiving services, an individual employment plan (IEP) or individual service strategy (ISS), must be developed. The ISS/IEP is a living document that must be reviewed regularly by front-line staff and adjusted throughout participation, jointly with the participant. The IEP is a negotiated agreement between the

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.

participant and CSRC detailing what the participant will do to obtain/return to employment and what the program will do to support the participant's efforts. The IEP is an ongoing strategy that must include a clear employment goal, identify assets and barriers, outline the steps necessary to achieve the employment goal, and include appropriate resources and services. The details of the OJT assignment must be incorporated into the ISS and/or IEP and must include the participant's details regarding the OJT assignment, as appropriate. CSRC staff must also include the following in the IEP:

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

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

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

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

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

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

II. Employer and Occupation Eligibility

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

- 1) OJT is for an in-demand occupation.
- 2) CSRC must ensure not to enter into an OJT Agreement with an employer who has exhibited a pattern of failing to provide OJT participants with continued long-term employment as regular employees with wages, benefits, and working conditions at the same level and to the same extent as other similarly situated employees.
- 3) The OJT must be full-time, permanent and paid subsidized employment, in which the employer teaches the participant to perform the skills required for the job. Full-time employment is defined as an average of 32 hours per week. Occupations or job types that are not suitable for OJT are occupations that are based on commission, seasonal in nature, or less than full time.

- 4) The training provided for WIOA participants must be above and beyond their current skill levels. CSRC does offer training on a sequential basis to individuals who have completed an Individual Training Account (ITA) where the job for which they have received training requires further training on the job for the participant to be proficient in the skills required to perform the job. All sequential training must be approved by the Director of Programs on a case-by- case basis.
- 5) The suitability of the employer worksite for training must be assessed by CSRC staff as part of the contract development, and prior to final completion of the contract and placement of the participant at the work site (OJT Pre -Award).
- 6) Wages paid to participants must be the same as the wages paid to others performing a comparable job. All OJT participants must be covered by worker’s compensation or liability insurance for the duration of the employment/training provided by the employer.
- 7) No member of the OJT trainee’s immediate family may be engaged in an administrative capacity for the employer or directly supervise the OJT trainee.

III. OJT Contract Requirements

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

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

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

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

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

IV. OJT Training Plan

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

Both the [OJT Agreement](#) and [OJT Training Plan](#) must be signed prior to the start date of the OJT.

V. OJT In-Person Worksite Monitoring Visit

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

VI. Payments to Employers, Wages and Participant Hours

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

A. Wage Reimbursement Rate

~~1.—CSRC permits the Vice President of Operations/COO, with approval of the President/CEO, to increase the reimbursement level up to 90 percent in specific situations CSRC may increase the wage reimbursement level above 50% when certain criteria are met.~~

~~a.— where the following factors are evaluated, presented at the time of the approval request, and documented in the OJT Training Plan:~~

~~a.~~

~~Requests for 75% reimbursement must take into consideration the following factors which must be presented at the time of request for approval, and subsequently documented in the OJT Training Plan:~~

- 1) The characteristics of the participant, taking into consideration whether they are individuals with barriers to employment.
- 2) The size of the employer, with an emphasis on small businesses (e.g. small and medium-sized businesses) often have more barriers to ~~participation~~participating at lower reimbursement rates)
- 3) The quality of employer-provided training and advancement opportunities (e.g. registered apprenticeships, when the [OJT Agreement](#) is for an in-demand occupation and will lead to an

industry- recognized credential).

4) Other factors CSRC may determine appropriate (e.g. the number of employees participating in the training, wage and benefit levels of the employees, and the relation of the training to the competitiveness of the participant).

~~a.~~ Reimbursement up to 100% is allowable for businesses located in or the employment of individuals who reside in designated Opportunity Zones. Opportunity Zones represent economically distressed census tracts identified by state governors and certified by the U.S. Department of Treasury.

B. Wage Reimbursement Restrictions

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

- 1) Paid or unpaid holidays.
- 2) Sick leave.
- 3) Vacation.
- 4) Overtime hours.
- 5) Fringe benefits; and/or
- 6) Work performed outside the [OJT Agreement](#).

C. Record Retention

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

D. Reverse Referral

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

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



~~Refer to WIOA – OJT Program Procedures~~
~~Refer to OJT Employer Pre Award Review~~
~~Refer to On-the-Job Training Agreement~~
~~Refer to Waiver of WIOA OJT~~
~~Reimbursement Limits~~

PURPOSE

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

REFERENCES

Public Law 113-128, Workforce Innovation and Opportunity Act, 20 CFR 680.700 - 680.840, 20 CFR 683.400, 20 CFR 683.410, Training and Employment Guidance Letter (TEGL) 19-16, 2 CFR Appendix II to Part 200, Contract Provisions for Non-Federal Entity Contracts Under Federal Awards, Chapter 445, Florida Statutes, [CareerSource Florida Workforce Policy – Work-Based Training and Work-Based Learning Opportunities](#); [CareerSource Florida Policy 009 – On-the-Job Training](#); [Waiver of Workforce Innovation & Opportunity Act On-the-Job Training Reimbursement Limits](#); [CSRC On the Job Training Local Operating Procedures](#)

BACKGROUND:

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

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

POLICY:

On-the-Job Training (OJT) is paid subsidized job skills training that is provided by an employer during the initial term of employment. OJT is designed to ensure the participant acquires the employer-specific job skills necessary to secure and maintain employment and provides knowledge or skills essential to the full and adequate performance of the job. The training is limited in duration as appropriate to the occupation for which the participant is being trained and is not to exceed six (6) months. The employer is typically reimbursed 50% of the participant's wages during the OJT period, although reimbursement may increase up 100 percent based on certain criteria. This reimbursement is designed to offset the employer's costs for providing the job training and any necessary additional supervision.

I. Participant Eligibility

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

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

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

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

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

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

D. [OJT Agreements](#) may be written for employed eligible workers only when one of the following occurs:

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

II. Employer and Occupation Eligibility

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

- 1) OJT is for an in-demand occupation.
- 2) CSRC must ensure not to enter into an [OJT Agreement](#) with an employer who has exhibited a pattern of failing to provide OJT participants with continued long-term employment as regular employees with wages, benefits, and working conditions at the same level and to the same extent as other similarly situated employees.
- 3) The OJT must be full-time, permanent and paid subsidized employment, in which the employer teaches the participant to perform the skills required for the job. Full-time employment is defined as an average of 32 hours per week. Occupations or job types that are not suitable for OJT are occupations that are based on commission, seasonal in nature, or less than full time.

- 4) The training provided for WIOA participants must be above and beyond their current skill levels. CSRC does offer training on a sequential basis to individuals who have completed an Individual Training Account (ITA) where the job for which they have received training requires further training on the job for the participant to be proficient in the skills required to perform the job. All sequential training must be approved by the Director of Programs on a case-by- case basis.
- 5) The suitability of the employer worksite for training must be assessed by CSRC staff as part of the contract development, and prior to final completion of the contract and placement of the participant at the work site ([OJT Pre Award](#)).
- 6) Wages paid to participants must be the same as the wages paid to others performing a comparable job. All OJT participants must be covered by worker’s compensation or liability insurance for the duration of the employment/training provided by the employer.
- 7) No member of the OJT trainee’s immediate family may be engaged in an administrative capacity for the employer or directly supervise the OJT trainee.

III. OJT Contract Requirements

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

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

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

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

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

IV. OJT Training Plan

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

Both the [OJT Agreement](#) and [OJT Training Plan](#) must be signed prior to the start date of the OJT.

V. OJT In-Person Worksite Monitoring Visit

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

VI. Payments to Employers, Wages and Participant Hours

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

A. Wage Reimbursement Rate

- a. CSRC permits the Vice President of Operations/COO, with approval of the President/CEO, to increase the reimbursement level up to **90 percent** in specific situations where the following factors are evaluated, presented at the time of the approval request, and documented in the OJT Training Plan:
 - 1) The characteristics of the participant, taking into consideration whether they are individuals with barriers to employment.
 - 2) The size of the employer, with an emphasis on small businesses (e.g. small and medium-sized businesses) often have more barriers to participating at lower reimbursement rates)
 - 3) The quality of employer-provided training and advancement opportunities (e.g. registered apprenticeships, when the [OJT Agreement](#) is for an in-demand occupation and will lead to an industry- recognized credential).
 - 4) Other factors CSRC may determine appropriate (e.g. the number of employees participating in the training, wage and benefit levels of the employees, and the relation of the training to the competitiveness of the participant).

Reimbursement up to 100% is allowable for businesses located in or the employment of individuals who reside in designated Opportunity Zones. Opportunity Zones represent economically distressed census tracts identified by state governors and certified by the U.S. Department of Treasury.

B. Wage Reimbursement Restrictions

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

- 1) Paid or unpaid holidays.
- 2) Sick leave.
- 3) Vacation.
- 4) Overtime hours.
- 5) Fringe benefits; and/or
- 6) Work performed outside the [OJT Agreement](#).

C. Record Retention

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

D. Reverse Referral

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

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

AGENDA ITEM SUMMARY

Title	Workforce Innovation and Opportunity Act (WIOA)/Wagner Peyser (WP) - Business Engagement and Economic Development Support Policy
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	CareerSource Florida Operational Policy O125 – Business Engagement and Economic Development Support
Action Requested	Review and Approve the WIOA/WP - Business Engagement and Economic Development Support Policy
Background	This newly developed policy establishes CSRC’s framework for business engagement and economic development support under the Workforce Innovation and Opportunity Act (WIOA) and Wagner-Peyser (WP), ensuring employer services are coordinated, consistent, and aligned with regional and state economic priorities. It formalizes expectations for partnership with economic development organizations, use of labor market intelligence, and deployment of work-based training strategies such as OJT, work experience, apprenticeships, and incumbent worker training. The policy supports a demand-driven workforce system that helps businesses grow, retain talent, and meet current and future workforce needs
Staff Recommendations	Approve the WIOA/WP - Business Engagement and Economic Development Support Policy
Supporting Material	WIOA/WP - Business Engagement and Economic Development Support Policy
Board Staff	Tracey McMorris Vice President of Operations/COO tmcmorris@careesourcerc.com (866-482-4473 ext. 528)

PURPOSE

This policy establishes CSRC's framework for business engagement and economic development support under WIOA and Wagner-Peyser, ensuring employer services are coordinated, consistent, and aligned with regional and state economic priorities. It formalizes expectations for partnership with economic development organizations, use of labor market intelligence, and deployment of work-based training strategies such as OJT, work experience, apprenticeships, and incumbent worker training. The policy supports a demand-driven workforce system that helps businesses grow, retain talent, and meet current and future workforce needs.

BACKGROUND

Business services help employers grow and connect individuals to jobs by aligning training with industry needs and preparing job seekers for in-demand roles. Local Workforce Development Boards (LWDBs) are required to deliver services that support regional economic growth and advance the WIOA goals of building a demand-driven workforce system. LWDBs must collaborate with economic development partners to address workforce gaps and plan for future needs.⁴ To promote consistency and efficiency across Florida's workforce system, LWDBs must align business services with statewide standards. A consistent statewide approach ensures employers receive high-quality support through sector strategies, career pathways, and proven models such as OJT, as highlighted in [Training and Employment Guidance Letter 21-22](#). The [2021 REACH Act](#) further integrates education and workforce systems to meet labor market demands.

LWDBs should collaborate within all counties in their local workforce development areas (LWDAs) and across regional planning areas to establish formal partnerships with regional and local EDOs to deliver seamless, high-quality business services. These partnerships should be documented in MOUs or formal agreements that outline the roles and responsibilities of each entity in supporting business recruitment, expansion, and retention efforts. Coordination efforts should be conducted in alignment with technical assistance and include regular meetings, joint planning sessions and shared business engagement metrics, economic impact metrics, partnership and coordination metrics, service delivery metrics, and shared goals for strategic alignment to ensure alignment with regional economic growth strategies.

LOCAL POLICY:

i. Strategic Coordination with Economic Development

CSRC is expected to foster strategic partnerships with regional and local businesses and EDOs by coordinating planning efforts, sharing labor market intelligence, and collaborating on initiatives that drive business growth and job creation. These partnerships ensure workforce strategies align with state workforce and economic goals, regional economic goals, and are supported through ongoing communication and data-informed decision-making. CSRC must coordinate with regional and local economic development agencies to:

- A. Identify business recruitment or expansion opportunities.
- B. Align WIOA-funded training programs with targeted business needs.
- C. Offer work-based training options as part of available support for employers.
- D. Increase awareness and provide timely support for businesses seeking state training program assistance like Quick Response Training (QRT) grants.

Such coordination must be documented in local MOUs or formal partnership agreements in alignment with technical guidance. CareerSource Florida and FloridaCommerce will provide technical assistance, including a standardized MOU template, information about existing economic development partnerships, and training resources, as part of a statewide toolkit.

ii. Business-Aligned Toolkit and Training Models

- A. With the support of technical assistance, resources, and a statewide toolkit provided by CareerSource Florida and FloridaCommerce, CSRC should develop a comprehensive local Business Toolkit that details the services and support available to businesses in alignment with standards set by CareerSource Florida and FloridaCommerce. CSRC must also establish and communicate clear procedures and products that ensure consistent implementation and compliance with federal and state regulations. These procedures must include:



1. **Application and Approval:** Outline clear procedural steps for requesting and approving training programs.
 2. **Documentation Standards:** Specify required records for training activities and outcomes.
 3. **Monitoring and Reporting:** Detail processes for oversight and compliance with WIOA, 20 CFR, and Chapter 445, Florida Statutes.
- B. CSRC should utilize WIOA-funded training strategies, including those listed below, as allowable options for effective implementation:
1. **On-the-Job Training (OJT):** Wage reimbursement for training new hires.
 2. **Paid Work Experience:** Temporary employment opportunities focused on skill development.
 3. **Registered Apprenticeships and Pre-Apprenticeships:** Structured programs for long-term talent development.
 4. **Incumbent Worker Training:** Training designed to help a business retain a skilled workforce or avert layoffs.
 5. **Customized Training:** Tailored training designed to meet the special requirements of a business or a group of businesses that is conducted with a commitment by the business to employ or continue to employ an individual upon successful completion of the training.
 6. **Quick Response Training:** Increase awareness and support of state-level training programs like Quick Response Training (QRT) grants.

AGENDA ITEM SUMMARY

Title	Workforce Innovation and Opportunity Act (WIOA) - Emergency Response and Disaster Recovery Policy
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	FloridaCommerce Grantee-Subgrantee Agreement; CareerSource Florida Workforce Policy 015 – Emergency Response and Disaster Recovery
Action Requested	Review and Approve WIOA Emergency Response and Disaster Recovery Policy
Background	This newly developed policy establishes CareerSource Research Coast’s framework for emergency response and disaster recovery operations under WIOA, including office closures, continuity of operations, cybersecurity, and coordination with state and federal partners. It also outlines requirements for administering Disaster Recovery Dislocated Worker Grants, including participant eligibility, allowable activities, worksite oversight, and non-duplication of funds. The policy aligns local operations with state and federal guidance to ensure timely, compliant, and effective workforce response during declared disasters and emergencies
Staff Recommendations	Approve the WIOA Emergency Response and Disaster Recovery Policy
Supporting Material	WIOA Emergency Response and Disaster Recovery Policy
Board Staff	Tracey McMorris Vice President of Operations/COO tmcmorris@careesourcerc.com (866-482-4473 ext. 528)



PURPOSE

To provide clear guidance and support to CareerSource Research Coast (CSRC) staff on operations and considerations during an emergency and outline clear expectations to guide data-based, responsive and comprehensive planning, response, and recovery in the event of a disaster or emergency

BACKGROUND

The Florida Division of Emergency Management leads the State Emergency Response Team (SERT), which coordinates disaster response across state agencies, nonprofits, and federal partners. FloridaCommerce leads SERT's Emergency Support Function 18 (ESF 18), which helps businesses recover and stabilize the economy. CareerSource Florida partners with FloridaCommerce, CSRC, and WIOA combined planning partners to support job seekers and businesses during emergencies. Together, they coordinate office closures, assess workforce needs, and deliver services such as Disaster Dislocated Worker Grants. The goal is to ensure quick, easy access to services that help communities recover and people return to work.

LOCAL POLICY:

I. CareerSource Florida Network Coordination

CareerSource Florida and FloridaCommerce collaborate systematically to support activities and the workforce recovery needs of the state before, during, and after an emergency.

II. Office Closures and Emergency Notifications

Local governments manage emergency declarations and evacuations under section [252.38, Florida Statutes](#). Counties and municipalities coordinate emergency management plans, which guide office closure decisions. CSRC must follow local directives and report closures exceeding two days to FloridaCommerce.

CSRC must designate a contact person responsible for notifying CareerSource Florida, FloridaCommerce, and the Local Emergency Operations Center of office closures. Updated contact details, including name, phone number, fax, and email, must be provided to FloridaCommerce and CareerSource Florida.

III. State-owned Facility Closures

FloridaCommerce will close state-owned workforce facilities in affected counties during disaster or emergency situations based on the following criteria:

- A. Local government decision to close offices
- B. Mandatory evacuation orders
- C. Declaration of a local state of emergency

When state-owned facilities are closed due to an emergency, employees assigned to those facilities will be released from duty and granted administrative leave for the duration of the closure. Employees required to remain on duty to provide essential services will receive special compensatory leave credits for hours worked during the closure. Essential services are normally considered to be services directly related to the preservation of life, health, or property.

IV. Non-State-Owned Facility Closures

CSRC must follow local and state emergency management directives and close offices accordingly.

CSRC must notify FloridaCommerce of emergency office closures exceeding two days, unless a state of emergency has been declared for a specified period.

V. Notification Protocols

CSRC must notify FloridaCommerce of office closures as soon as possible, and within 48 hours of the event, as feasible, using approved communication channels. Closure information will be posted and made available to the public.

VI. Operational Requirements

- CSRC shall support business and jobseeker customers through a combination of activities, including but not limited to:
- A. Providing access as available to career centers and dedicated staff through on-site, virtual, and electronic interactions.
 - B. Providing access to career center mobile units as directed and coordinated by CareerSource Florida and FloridaCommerce in consultation with federal and state partners.
 - C. Providing access to quality customer service and direct services to affected workers including:
 1. job training services
 2. filing of reemployment assistance claims
 3. resume preparation and job-readiness workshops
 4. job placement services
 5. career and skills assessment services
 6. labor market information
 7. referrals to community programs
 8. information on the impacts of layoffs on health coverage and other benefits
 9. community resource workshops
 10. veterans' programs and services for those with barriers to employment
 11. supportive Services described in [20 CFR 680.900](#) for Adult and Dislocated Workers and [20 CFR 681.570](#) for Youth
 12. job fairs and other special events

VII. Cybersecurity and Protection of Electronic Data

Operational emergency planning must include cybersecurity measures consistent with guidance provided by FloridaCommerce and grantee-subgrantee agreements. CSRC must notify Florida Commerce via the approved method when a cyberattack occurs and must have a local operating procedure (LOP) that includes the following:

1. Data protection
2. Authentication using MFA or passkeys
3. Staff responsibilities
4. Incident response
5. Device management

The incident response plan should outline the steps to be taken during a breach in security. This plan must also include clear direction on roles and responsibilities of specific CSRC staff through access control measures, establish communication channels, and define escalation procedures.

CSRC should conduct and document periodic cybersecurity assessments and audits to identify vulnerabilities and weaknesses that include penetration testing and vulnerability scanning to uncover potential flaws in the organization's systems. CSRC should implement a strategy to ensure all systems receive OS, application, driver and firmware updates at a regular cadence and should ensure critical data and systems are recoverable in a manner consistent with their approved LOP for continuity of operations to ensure essential functions continue during and after a disruption or crisis.

CSRC is required to take reasonable measures to protect and secure electronic data containing personal information. CSRC must follow the requirements set forth in their agreements with FloridaCommerce regarding any breach of security and must follow the requirements in section [501.171, Florida Statutes](#), and FloridaCommerce's directions as specified in the [Grantee-Subgrantee Agreement](#).

VIII. Disaster Recovery Jobs Portal

CSRC shall provide expedited access to individuals whose employment has been either lost or interrupted as a direct result of a major disaster and instruction on navigating the Disaster Recovery Jobs Portal linked from the Employ Florida website to find job opportunities or post disaster-related jobs to assist in rebuilding affected communities.

IX. Rapid Response and Layoff Aversion Activities and Short-Time Compensation

CSRC shall provide access to Rapid Response and Layoff Aversion activities authorized under WIOA and described in [CareerSource Florida Workforce Policy 2021.06.09.A.2 – Rapid Response and Layoff Aversion System](#) and [Training and Employment Guidance Letter No. 19-16](#), to assist employers and impacted workers prior to and immediately following announcement of layoff or natural or other disaster resulting in a mass job dislocation.

X. Business Damage Assessment Surveys

Encouraging business owners to navigate [FloridaDisaster.biz](#) to obtain information about preparedness resources, current disaster updates, recovery programs, and to complete the Florida Business Damage Assessment Survey, which helps FloridaCommerce to determine damage related to disaster impacts, understand individual business needs, and to inform relief efforts.

XI. Local Operating Procedures and Continuity of Operation Plans (COOP)

CSRC and the Treasure Coast-Palm Beach Regional Planning Area shall consult with local government, chief local elected officials, and other stakeholders to develop streamlined strategies, policies, and a comprehensive Continuity of Operations Plan (COOP) that describes engagement in systematic processes that accomplish the following:

- A. Creation of local board-led strategies and policies that ensure uninterrupted communication with federal, state, and local partners and designation of trained employees to communicate with state and local partners, leadership, and board members before, during, and after a state of emergency.
- B. A published plan that ensures the safety and availability of staff, minimizes disruption of service delivery, and maximizes cooperation with all partners.
- C. Includes emergency contacts, a disaster response checklist, and service delivery options that include virtual and mobile service delivery. Plans must outline how customer services will be provided within 24 hours, or as soon as practicably possible, of a disaster declaration. CSRC must update and submit COOPs biennially to CareerSource Florida and FloridaCommerce. COOP plans may be included as part of WIOA local plans and two-year modifications.
- D. Includes ongoing training of incumbent and new staff to ensure current and sufficient levels of awareness of operational activities before, during, and after a state of emergency.
- E. Outlines outreach, including surveys of existing and potential business customers before and after states of emergency to obtain business intelligence and information about community business needs resulting from disasters and other emergencies.

XII. Use of Disaster Recovery Dislocated Worker Grants

Pursuant to [Training and Employment Guidance Letter \(TEGL\) 09-24](#), FloridaCommerce has the authority to apply for Disaster Recovery Dislocated Worker Grants (DWGs) to help communities affected by a natural disaster or emergency recovery from the impacts of these events and to help develop a workforce better equipped for resiliency to disaster events in the future.

CSRC shall administer and deliver services under the Disaster Recovery DWG funding associated with the Disaster/Emergency Declaration that impacts its area, including but not limited to the following:

- A. Working with state and local governmental agencies to assess the need for temporary disaster-relief workers and developing worksite agreements to address these needs.
- B. Working with local employers to address talent needs in the wake of the disaster/emergency; and
- C. Conducting outreach and eligibility determination of individuals applying for workforce services and providing eligible participants appropriate grant services.

1. Before Qualifying Events

Disaster recovery efforts are primarily managed at the local level and, as the subrecipients of Disaster Recovery DWG funding, LWDBs play a pivotal role in supporting the economic and overall recovery of their region.

CSRC shall participate in pre-disaster planning efforts organized by FloridaCommerce to:

- a. Identify existing recovery stakeholders (local agencies or organizations that would be critical to support the recovery process after a disaster).
- b. Coordinate with existing recovery stakeholders and local government officials to develop communication plans and memorandums of understanding.

- c. Develop public engagement strategies to effectively communicate Disaster Recovery DWG funding availability, flexibilities, and limitations.
- d. Identify organizations, such as recovery stakeholders, who may operate as worksite sponsors and develop worksite agreements with such organizations.
- e. Prepare position descriptions that encompass anticipated cleanup and restoration activities and providing humanitarian assistance.
- f. Identify training programs to help local businesses and their workers recover from the disaster.
- g. Develop general processes and point people for managing Disaster Recovery DWGs;
- h. Train appropriate staff on Disaster Recovery DWG participant eligibility, worksite prioritization, and allowable costs.

2. Determining a Need for a Disaster Recovery DWG

FloridaCommerce will assess the need for disaster-relief employment, determine funding needs, decide whether to apply for a Disaster Recovery DWG, and will make Disaster Recovery DWG awards to impacted LWDBs.

3. Disaster Recovery DWG Application Submittal

If a need for Disaster Recovery DWG funding is identified, FloridaCommerce will assist impacted LWDBs in submitting an application in accordance with [TEGL 09-24](#), which must include:

- a. An abstract that identifies impacts of the qualifying event, an overview of activities anticipated, type of participants to be enrolled, a list of project operators or subrecipients and any deliverables or expected outcomes.
- b. A summary of emergency management agency coordination or anticipation of such activities.
- c. A project overview to include the project's scope and priorities, as well as plans to identify, recruit, and enroll eligible participants.
- d. A Community Needs Assessment for each project.
- e. Projected enrollment and cost breakdown by type of activity.
- f. A project timeline that includes major goals and objectives over the period of performance; and
- g. A line-item budget.

4. Community Needs Assessment

As a part of the application process, FloridaCommerce submits a Community Needs Assessment to USDOL. The assessment provides the context for the effects of the qualifying event and sets the scope of the planned response. The Community Needs Assessment must describe:

- a. The impacts of the declared emergency or disaster event, including how the proposed grant will prioritize projects from communities and individuals most in need due to the effects of the declared disaster or emergency situation, or due to economic or other disadvantage.
- b. How the proposed projects will address the cleanup, or humanitarian needs that stem from the impacts of the declared emergency or disaster.
- c. How proposed disaster-relief employment projects will address the needs and help mitigate the effects of the declared emergency or disaster event, and promote community recovery, including through creating high-quality employment opportunities
- d. How Disaster Recovery DWG funds will provide opportunities for individuals to return to unsubsidized employment as a result of grant activities.

CSRC and its Regional Planning Partner affected by a declared disaster must coordinate with county and city emergency management offices and other agencies involved in disaster recovery in the affected areas to complete the Community Needs Assessment. Such agencies will include FEMA, Small Business Administration, voluntary organizations active in disaster (VOAD) in the affected area, and others.

5. Funding of Disaster Recovery DWGs

USDOL issues its funding decision within 45 calendar days of receiving a valid application. If the application is approved, USDOL will issue Disaster Recovery DWG funds to FloridaCommerce in full or incrementally.

FloridaCommerce will use state and federal disaster declarations, the Business Damage Assessment Survey and local recovery stakeholder feedback to determine areas of the state that have significant disaster recovery needs. CSRC is expected to use Disaster Recovery DWG funds when areas within its region demonstrate significant disaster recovery needs.

FloridaCommerce will distribute funds to participating LWDBs based on identified needs and availability of funds. When participating, funds are released to CSRC by FloridaCommerce through NFAs that describe special grant conditions. Requests for additional funds must be submitted by CSRC to FloridaCommerce when needed and must be supported by information that details enrollments, completion of work goals, remaining program activities, and expenditures. FloridaCommerce is responsible for ensuring that funds are expended in compliance with Disaster Recovery DWG requirements and for the de-obligation and re-obligation of funds to meet ongoing needs. Failure to meet planned Disaster Recovery DWG enrollments and/or expenditures may result in sanctions for LWDB failure to meet federal and state standards, as described in [Workforce Policy 104 – Sanctions for Local Workforce Development Boards' Failure to Meet Federal and State Standards](#).

6. Participant Eligibility

CSRC must ensure that individuals receiving services funded by a Disaster Recovery DWG meet at least one of the following eligibility requirements:

- a. Temporarily or permanently laid off as a consequence of the emergency or disaster. The term “laid off as a consequence of the emergency or disaster” includes any job separation that can be reasonably linked, directly or indirectly, to the disaster or emergency. May include individuals who were forced to leave their employment following the disaster due to reductions in time or wages, as well as external circumstances caused by the disaster that prevents them from remaining at their pre-disaster job. For example, a worker may have to leave a job to take care of problems caused by the emergency or disaster, to take care of themselves or a relative during the emergency or disaster or dealing with temporary or permanent homelessness due to the emergency or disaster. May include individuals whose offers of employment were rescinded or whose ability to work was delayed or canceled due to the disaster.
- b. A dislocated worker as defined in WIOA Section 3(15), including displaced homemakers as defined in WIOA Section 3(16).
- c. A long-term unemployed individual, defined as an individual who has been unemployed for six (6) out of the last 13 weeks. An individual is considered unemployed if they were not employed during the weeks in question or were employed in irregular jobs, such as day labor, or in part-time positions, (i.e., an average of 20 hours or less for the six weeks).
- d. A self-employed individual who became unemployed or significantly underemployed as a result of the emergency or disaster. An individual is significantly underemployed when their income from self-employment is no longer adequate to maintain self-sufficiency or meet living expenses

7. Eligibility Documentation

CSRC must document eligibility in the participant’s Employ Florida program application, including, but not limited to the participant’s:

- a. [Verification of Work Authorization Status](#)
- b. Citizenship or right to work (A copy of the completed Form I-9 and E-Verify documentation must be maintained in the file of a participant placed into a temporary disaster-relief position)
- c. Compliance with the Selective Service Act
- d. Status as one of the four grant-specific eligibility categories listed above. Such documentation may include a notice of separation from previous employer; documentation of Reemployment Assistance benefits or other unemployment compensation; federal income tax returns; business ledgers; and client information for self-employed individuals

CSRC is required to collect supporting eligibility documentation used to determine eligibility and retain such documentation in the participants' electronic and/or hard-copy case files, in accordance with local operating procedures, and upload this documentation into Employ Florida, as soon as is practicably possible. Additionally, CSRC must obtain and maintain documentation that supports the determination for eligibility and continued participation, including utilizing the E-Verify system pursuant to [Section 448.095, F.S.](#)

Circumstances surrounding the disaster may make documentation of eligibility difficult for participants to obtain during the initial stages following the disaster. Self-attestation is an allowable method for documenting employment-related eligibility requirements when other documentation is not available. If CSRC staff subsequently discovers through monitoring that it has served an ineligible participant, the participant must be terminated from the program, and a case note must be recorded in Employ Florida describing the review process and subsequent determination of ineligibility. This situation will not result in disallowed costs.

8. Veterans and Eligible Spouse Priority of Service

As covered persons, veterans and eligible spouses determined eligible for services under a Disaster Recovery DWG must receive priority over non-covered persons in accordance with [Workforce Policy 111, Priority of Service for Veterans and Eligible Spouses](#).

9. Allowable Activities

In most cases, Disaster Recovery DWG projects must include a disaster-relief employment component. Disaster Recovery DWGs awarded due to an influx of individuals relocated from a disaster-affected area to another geographic area may not require a temporary disaster-relief employment component. Participants may be enrolled in disaster-relief employment activities, as well as employment and training activities, concurrently, sequentially, or as stand-alone services. However, certain Disaster Recovery DWG awards may limit the availability of certain activities as specified within the accompanying NFA.

Prioritization of types of services must be determined in coordination with local emergency planning and recovery agencies as further discussed in this policy.

10. Disallowed Activities

The following are not allowable uses of Disaster Recovery DWG funds:

- a. Activities that are in preparation for future disasters
 - 1) DWG activities must be designed to mitigate the effects of the current declared disaster for which the grant was awarded; activities that may prevent future disasters or their impacts are permissible only where such activities are incidental to addressing the impacts of the current disaster or emergency
- b. Customized Training for employed workers and Incumbent Worker Training (IWT). IWT is generally not allowable for DWGs but may be made available for certain specified funding opportunities.
- c. Purchasing humanitarian supplies such as food, clothing, and hygiene products. For example, Disaster Recovery DWG funding could be used to support food delivery workers through disaster-relief employment at food shelters but not to purchase the food itself.
- d. Purchasing materials to do repairs.
- e. Matching FEMA funds.
- f. Membership dues for local economic development organizations
- g. Paying for CSRC staff education not directly related to the performance of their job duties in managing the Disaster Recovery DWG.

11. Disaster-Relief Employment

CSRC must demonstrate that disaster-relief employment created under a Disaster Recovery DWG aligns with either of the following categories:

- a. Cleanup and recovery efforts
- b. Delivery of appropriate humanitarian assistance in the aftermath of an emergency or disaster.

Post-disaster response and recovery activities address needs associated with mass care/sheltering, public health and health care, (re)housing, debris/infrastructure removal and repair, support to business owners, emotional/psychological support, public health and health care, and mitigation activities that are directed at correcting existing damage.

Humanitarian assistance provided by temporary disaster-relief workers generally includes actions designed to alleviate suffering and maintain human dignity in the aftermath of disasters. The aftermath involves time and causality. With every declared disaster, there will be physical damage which results in the dislocation of individuals, families, and businesses, as well as economic and emotional damage. Temporary disaster-relief workers may be provided to help deal with these crises since they are the consequence of the disaster for the time necessary to help affected individuals recover. The humanitarian assistance provided by disaster-relief workers must relate directly to needs created by the disaster or emergency, and physical, emotional, and economic consequences of the disaster or emergency.

12. Disaster-Relief Employment Duration

Eligible participants may be enrolled into disaster-relief employment under a Disaster Recovery DWG for up to 12 months or 2,080 hours (whichever is longer).

USDOL may approve an extension for up to an additional 12 months/2,080 hours through a grant modification. When an extension is granted, FloridaCommerce will notify the impacted LWDBs by modifying the NFAs to reflect the extension.

13. Participant Wages and Fringe Benefits

In accordance with WIOA Section 181(a)(1)(A), participants must be compensated at the same rates, including periodic increases, as employees who are similarly situated in similar occupations doing the same type of work, and who have similar training, experience, and skills.

However, in cases where the worksite does not have employees doing the same or similar work and with similar training, experience, and skills, LWDBs must ensure that the wages paid to participants:

- a. Are in line with the industry standard for that type of work in the area where the work is to be performed, supported by documentation
- b. Are paid at least \$15 per hour in the absence of a determinable industry standards for the area where the type of work is to be performed.

Where applicable, fringe benefits must be paid in accordance with the policies of the Disaster-Relief Employer. Disaster-Relief Employers are entities designated by FloridaCommerce or LWDBs to carry out day-to-day human resources and payroll activities of a Disaster Recovery DWG. If employees at the worksite are doing similar work and receiving hazard pay, disaster-relief workers may also be paid hazard pay rates for their work. Overtime is allowable.

14. Training and Pre-vocational Activities

To meet the disaster-recovery needs of affected areas, CSRC may provide short-term training and pre-vocational activities that allow a disaster-relief worker to obtain the skills needed to conduct the disaster-relief work. Such training is not required to be included in state or local eligible training provider/program list, nor is the occupation required to be on the local targeted occupation list. For example, this may include training in the use of heavy equipment. During involvement in these activities, for a participant who has been hired in a disaster-relief position that requires attainment of specific skills, the participant may receive wages under the Disaster Recovery DWG.

15. Employment and Training Activities

Pursuant to WIOA Section 170(d)(1)(C), CSRC may use Disaster Recovery DWG funding to provide employment and training activities to participants to help them obtain (re)employment that leads to self-sufficiency when they are unlikely to return to their prior employment. These services may include job search/job readiness activities, literacy instruction, including English as a Second Language (ESL) instruction, and occupational skills training and/or work-based training for career pathways that lead to high-demand jobs in high-growth industries. An Individual Employability Plan must be developed in Employ Florida, detailing the need for training services as well as certain individualized career services such as work experiences, literacy/GED prep/ESL instruction, short-term pre-vocational services, and out-of-area job searches/relocation.

16. Supportive Services

CSRC must provide supportive services when needed to enable individuals to participate in disaster-relief employment and employment and training activities. Supportive services provided to participants in disaster-relief employment must be designed to enable the participant to safely and effectively carry out the job for which they have been hired. Any supportive service provided must enable the individuals to participate in grant-funded employment and training activities. Any supportive services provided must be consistent with WIOA and applicable regulations, as well as [Workforce Policy 109, Supportive Services and Needs Related Payments](#). CSRC must ensure its local operating procedures governing supportive services and needs-related payments include the provision of such services to individuals participating in disaster-relief employment and employment and training activities.

Note: Participants who receive wages from disaster-relief employment are not eligible for needs-related payments.

17. Disaster-Relief Employers and Worksites

CSRC must identify appropriate Disaster-Relief Employers based on the nature and scope of the disaster or emergency and the types of disaster-relief activities that projects will be carrying out. CSRC must have contracts or agreements in place with Disaster-Relief Employers to ensure that they comply with all Disaster Recovery DWG and other relevant rules and requirements, including with regard to employment activities, participant eligibility, participant safety and health (including Occupational Safety and Health Administration (OSHA) safety and work condition standards), supervision and attendance, and any other worksite requirements.

Similarly, CSRC must identify appropriate Worksite Sponsors based on the nature and scope of the disaster or emergency and the types of disaster-relief activities that projects will be carrying out. Worksite Sponsors are entities with which participants are placed to engage in disaster-relief employment and are often governmental or nonprofit entities to avoid potential conflicts of interest. Worksite Sponsors are entities that preferably have experience in disaster recovery and enter into worksite agreements with LWDBs to develop position descriptions and to support participant placement on worksites. CSRC must ensure that the Worksite Sponsor complies with all Disaster Recovery DWG and other relevant rules and requirements.

18. Eligible Disaster-Relief Employers

Each disaster-relief worker must have an employer of record, referred to as the Disaster-Relief Employer. There is no limitation on what type of entity or organization may be a Disaster-Relief Employer. CSRC, a staffing agency, or another entity may be the Disaster-Relief Employer. The Disaster-Relief Employer is responsible for maintaining all personnel and payroll records related to the employment of disaster relief workers, including employer and employee withholdings and other benefits, if applicable. The Disaster-Relief Employer may be responsible for unemployment claims filed by temporary disaster-relief workers when their assignment ends.

19. Worksite Selection

Disaster-relief worksites must be in the geographic area covered by the qualifying event for the Disaster Recovery DWG and within CSRC's jurisdiction. In extraordinary cases, CSRC may develop and staff worksites outside of their jurisdiction with approval from FloridaCommerce. CSRC must give the highest priority to cleanup of the disaster area's most severely damaged public communities, facilities, and property, and to the cleanup of and provision of humanitarian assistance to economically disadvantaged portions of the disaster area.

The administration of Disaster Recovery DWG funds must be in coordination with projects administered by emergency management and disaster recovery agencies. The funding of temporary disaster-relief positions shall not duplicate or supplant other funding.

Projects may perform work on private property when the following conditions are met:

- a. The work must be intended to remove health and safety hazards to the larger community, or to address or alleviate specific economic or employment-related impacts of the disaster, such as cleanup work needed for disaster-affected employers to resume or continue operations.
- b. The activities are necessary to remove health and safety hazards on private lands or around homes or other structures and may only return the land or structure(s) to a safe and habitable level, or operational status, and will not improve the original land or structure(s)
- c. CSRC establishes a priority of disaster-relief activities in coordination with the local area's disaster-recovery team that identifies the need for and use of private for-profit worksites, as applicable. In some communities, groups are sanctioned by the County Emergency Operations Center, and any number or type of nonprofit could be the county's proxy for disaster-relief activities. This may include the Red Cross, Salvation Army, United Way, faith-based groups, and others.

20. Health and Safety Standards

In all Disaster Recovery DWG projects, CSRC must establish written policies specifying that Disaster-Relief Employers ensure that project participants are afforded the same health and safety standards established under federal and state law applicable to working conditions of permanent employees. CSRC must also ensure that participants receive appropriate safety training and ensure safe working conditions in accordance with the OSH Act of 1970, as amended. LWDBs are responsible for ensuring and maintaining documentation that worker orientation and OSHA/safety training has occurred.

Note: Certificates awarded for completion of basic safety training (i.e., OSHA 10) are not recognized postsecondary credentials under WIOA.

21. Prioritizing Disaster-Relief Worksites

CSRC must be prepared to deploy the most appropriate disaster-relief jobs based on the criteria listed in [TEGL 09-24](#), as well as through consultation with local government, community and faith-based organizations, economic development and industry stakeholders, etc. Priorities for the types of disaster-relief jobs should be based on an assessment of the following factors:

- a. Physical impact on public properties.
- b. Physical and human impact on the elderly, people with disabilities, low-income and other special needs populations.
- c. Impact on organizations that are needed to respond to the disaster or emergency (governmental, community, and faith-based)
- d. Impact on local businesses, industry sectors, and the overall economic health of the area.

22. Approval and Tracking of Worksites

CSRC is responsible for approving temporary disaster-relief worksites and job duties for disaster-relief workers. Worksite Reports containing worksite and job description information must be maintained and reported to FloridaCommerce according to a schedule and in a format provided by FloridaCommerce for each Disaster Recovery DWG. Worksite files must be maintained for each worksite and must include:

- a. The agreement between CSRC, the Worksite Sponsor, and the Disaster-Relief Employer, including non-duplication requirements.
- b. Approved job descriptions.
- c. Evidence of appropriate OSHA/safety training.
- d. Evidence that supervisor orientation²⁴ has taken place at the worksite.

- e. Description of supplies and equipment needed and responsibility for providing such. The worksite file identifies the supplies and equipment that will be needed for the temporary disaster-relief workers to fulfill their job duties. As supplies are provided to individual participants, these are recorded as supportive services in Employ Florida
- f. Copies of attendance records.

Worksite files will be reviewed on a semi-annual basis by FloridaCommerce staff and must be provided upon request.

Use of Equipment for Temporary Disaster-Relief Workers Generally, Disaster Recovery DWG funds may not be used to purchase equipment. (Equipment means tangible [personal property](#) (including information technology systems) having a useful life of more than one year and a per-unit [acquisition cost](#) that equals or exceeds the lesser of the capitalization level established by the [non-Federal entity](#) for financial statement purposes, or \$10,000. See [2 CFR 200.1](#)). [Workforce Policy 87, Prior Approval Administrative Policy for Local Workforce Development Boards](#) requires prior approval from FloridaCommerce before funds awarded to a LWDB may be used to purchase equipment for such cases, which may be subject to exception.

If equipment needed for the temporary disaster-relief workers to complete their assigned task is not available at the worksite, such equipment may be rented. Equipment rental expenses must be detailed as a separate line item in the budget(s) submitted by CSRC to FloridaCommerce.

23. Coordination with FEMA and Non-Duplication of Funds

Disaster-relief activities must be coordinated with the appropriate local emergency management agencies to avoid duplication of benefits and ensure that grant activities appropriately respond to the affected community's needs after a disaster. Duplication occurs when a beneficiary receives assistance for the same purpose from multiple sources resulting in the total assistance exceeding the actual need. CSRC must also coordinate with federal agencies responding to the disaster, either through direct contact or through state or local agencies working with the federal agencies.

As FEMA and Disaster Recovery DWG funds can pay for similar services, the best way to ensure that CSRC is not duplicating FEMA funding is to obtain a written statement from the county, city, and/or non-profit as to what services and/or funding FEMA is or will be supplying to the entity and what disaster-recovery services will be provided by disaster-relief temporary workers. This will provide documentation to show that Disaster Recovery DWG funds are not duplicated with FEMA funded services/activities. The written statement should include a brief description of what staff, equipment, supplies, etc., are being paid through FEMA vs. Disaster Recovery DWGs. When a Disaster Recovery DWG funded disaster-relief temporary job participant works at a site which is later approved for FEMA reimbursement, and it is time for FEMA to reimburse the costs of the project, the wages of the temporary job participants must be deducted from the cost of the project before FEMA reimburses 75% of the cost of the project to the local government.

CSRC must establish policies and procedures that describe how it will assess the availability of other resources, such as assistance from FEMA, private insurance, etc., to ensure non-duplication of funds and recover grant funds when other funds become available for the same activities. The established policies and procedures must also address a plan to recover grant funds expended for activities or services for which other funds become available from FEMA, public or private insurance, or other available resources.

Agenda Item 7

AGENDA ITEM SUMMARY

Title	Local Targeted Occupations List (LTOL) for 4th Quarter of PY 2025-2026
Strategic Goal	Strong Advancement of Existing and Emerging Local Targeted Industry Clusters
Policy/Plan/Law	Workforce Innovation & Opportunity Act
Action Required	Review and Approve the LTOL for the 4th Quarter of Program Year - 2025-2026
Background	<p>The Department of Commerce’s (FLORIDACOMMERCE) Bureau of Labor Market Statistics (LMS) has published the 2025-2026 Statewide Targeted Occupations List on the FloridaCommerce website. The Statewide Demand Occupations list identifies the labor market needs of Florida’s business community and encourages job training based on those needs, with emphasis on jobs that are both high demand and high skill/high wage, and is used as a baseline for establishing the Local Targeted Occupations Lists (LTOLs). The Local Workforce Development Boards (LWDBs) develop and use their LTOLs to identify occupations for which eligible adults and dislocated workers may receive training assistance under the Workforce Innovation and Opportunity Act.</p> <p>Pursuant to CareerSource Florida policy, LWDBs are to develop their LTOLs, in consultation with local business and industry representatives, using the LMS-generated Demand Occupations Lists, as well as other resources, such as Supply/Demand lists. The LWDBs must publish their updated LTOLs on their websites and update them as they make changes. CareerSource Research Coast adopted a local policy to incorporate CareerSource Florida’s LTOL policy and process. As part of our local policy, the LTOL is to be reviewed and approved on a quarterly basis in order to add occupations in demand or delete occupations that are declining.</p>
Staff Recommendation	Staff reviewed local labor market information and resources regarding the LTOL. Staff are recommending one addition to the LTOL for the 4th Quarter. Staff recommends approval of this LTOL for the 4th Quarter of PY 2025-2026.
Supporting Materials	CareerSource Research Coast Local Targeted Occupations List
Board Staff	<p>Tracey McMorris Vice President of Operations/COO tmcmorris@careersourcerc.com (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 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			
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

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 Industry?	Qualifying Level***
			Annual % Growth	Annual Openings	2024 Hourly Wage		Annual % Growth	Annual Openings	2024 Hourly Wage				
					Mean	Entry			Mean	Entry			
151242	HSW	Database Administrators	0.03	2	41.39	23.82	N/A	N/A	N/A	N/A	6	No	O
151243	HSW	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	HSW	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	HSW	Diagnostic Medical Sonographers	1.51	11	38.80	31.68	0.47	412	39.71	32.95	5	Yes	E
291031	HSW	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	HSW	Electrical and Electronics Drafters	N/A	N/A	N/A	N/A	0.82	137	32.78	23.92	5	Yes	E
172071	HSW	Electrical Engineers	0.11	6	47.48	32.66	0.44	454	54.22	36.06	6	Yes	E
499051	HSW	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	HSW	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	HSW	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	HSW	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	HSW	Engineers, All Other	N/A	N/A	46.06	26.58	0.58	663	52.02	31.50	6	Yes	E
119072	HSW	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	HSW	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	HSW	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	HSW	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	HSW	Facilities Managers	0.03	13	47.28	27.41	N/A	N/A	N/A	N/A	6	No	O
119013	HSW	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	HSW	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	HSW	Financial Examiners	1.74	4	47.13	31.95	0.50	280	39.60	24.07	6	Yes	E
113031	HSW	Financial Managers	1.88	58	81.05	38.61	0.64	2,964	80.69	42.15	6	Yes	R
132054	HSW	Financial Risk Specialists	0.54	5	47.66	33.77	0.54	309	51.89	30.61	6	Yes	E
132099	HSW	Financial Specialists, All Other	0.60	7	38.70	22.07	0.55	680	35.25	21.82	6	Yes	N
332011	HSW	Firefighters	0.56	81	37.03	24.76	0.32	1,810	30.58	19.77	4	No	R
471011	HSW	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	HSW	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	HSW	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	HSW	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	HSW	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	HSW	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	HSW	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	HSW	Food Scientists and Technologists	N/A	N/A	N/A	N/A	0.26	27	46.19	24.44	6	Yes	E
119051	HSW	Food Service Managers	0.50	91	34.00	18.96	0.71	3,453	34.25	20.67	3	No	R
131131	HSW	Fundraisers	0.06	10	37.85	23.25	N/A	N/A	N/A	N/A	6	No	O
111021	HSW	General and Operations Managers	0.94	404	53.91	21.20	0.80	17,467	61.83	25.80	6	Yes	R
192042	HSW	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	HSW	Health Information Technologists and Medical Registrars	1.42	5	26.67	18.16	0.65	271	35.58	19.89	4	Yes	E
251071	HSW	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	HSW	Human Resources Managers	1.14	9	61.09	39.60	0.76	816	66.85	39.61	6	Yes	S
131071	HSW	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	HSW	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	HSW	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

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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 Training Code	In Industry?	Qualifying Level***
			Annual % Growth	Annual Openings	2024 Hourly Wage		Annual % Growth	Annual Openings	2024 Hourly Wage				
					Mean	Entry			Mean	Entry			
151212	HS	Information Security Analysts	3.63	16	55.75	34.07	1.41	888	56.49	36.39	6	Yes	S
519061		Inspectors, Testers, Sorters, Samplers, and Weighers	0.45	57	24.44	16.93	0.55	2,410	24.00	16.65	4	Yes	R
131032	HS	Insurance Appraisers, Auto Damage	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	4	Yes	E
413021	HS	Insurance Sales Agents	1.28	97	37.06	19.50	0.83	5,254	38.60	19.70	4	Yes	R
132053	HS	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	HS	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	HS	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	HS	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	HS	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	HS	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	HS	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	HS	Management Analysts	1.15	109	44.20	23.70	0.91	7,131	47.42	26.12	6	Yes	R
119199	HS	Managers, All Other	0.84	69	50.62	24.29	0.57	4,150	56.32	26.57	6	No	R
172121	HS	Marine Engineers and Naval Architects	N/A	N/A	N/A	N/A	1.10	48	56.43	33.73	6	Yes	E
131161	HS	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	HS	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	HS	Materials Scientists	0	0	N/A	N/A	N/A	N/A	55.96	36.00	6	No	E
173027	HS	Mechanical Engineering Technologists and Technicians	0.78	2	N/A	N/A	0.96	104	31.89	24.31	5	No	E
172141	HS	Mechanical Engineers	1.77	12	47.56	30.10	0.68	547	48.98	32.38	6	Yes	N
119111	HS	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	HS	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	HS	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	HS	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	HS	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	HS	Musicians and Singers	0.60	31	61.91	27.35	0.16	1,226	69.32	25.01	3	No	R
119121	HS	Natural Sciences Managers	0.89	7	57.12	32.13	N/A	N/A	N/A	N/A	6	Yes	E
151244	HS	Network and Computer Systems Administrators	0.56	19	43.21	29.88	1.19	1,592	46.19	30.48	6	Yes	S
292033	HS	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	HS	Occupational Health and Safety Specialists	N/A	N/A	N/A	N/A	0.73	700	40.11	24.72	6	Yes	S
312011	HS	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	HS	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	HS	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	HS	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	HS	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	HS	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	HS	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	HS	Project Management Specialists	0.89	86	46.48	28.01	0.89	5,501	49.64	30.39	6	Yes	R
132020	HS	Property Appraisers and Assessors	1.20	11	33.87	20.80	0.73	558	40.25	22.87	6	No	S
119141	HS	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	HS	Purchasing Managers	0.06	5	58.51	34.07	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			
292034	HSBW	Radiologic Technologists and Technicians	0.31	25	33.31	26.54	0.44	917	34.13	25.82	5	Yes	E
419021		Real Estate Brokers	1.27	16	45.50	19.06	0.76	708	41.45	17.45	4	No	S
419022		Real Estate Sales Agents	1.13	133	39.48	16.17	0.76	7,129	35.25	16.84	4	No	R
291141	HSBW	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	HSBW	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	HSBW	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	HSBW	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	HSBW	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	HSBW	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	HSBW	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	HSBW	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	HSBW	Software Developers	2.78	57	61.79	37.79	1.67	5,834	61.68	38.59	6	Yes	R
151253	HSBW	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	HSBW	Special Education Teachers, Secondary School	1.15	19	31.22	23.23	0.71	678	30.39	23.07	6	No	S
271014	HSBW	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	HSBW	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	HSBW	Technical Writers	0.00	3	43.25	30.29	1.16	278	41.88	28.24	6	No	E
492022	HSBW	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	HSBW	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	HSBW	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	HSBW	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	HSBW	Web and Digital Interface Designers	1.65	5	35.04	13.32	1.19	498	41.22	22.39	5	Yes	N
151254	HSBW	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	HSBW	Writers and Authors	0.00	3	40.41	21.73	N/A	N/A	N/A	N/A	6	No	O

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

**HSHW = High Skill/High Wage.

***Qualifying Level:

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

N/A = Not available/releasable.

LMEC = Labor Market Estimating Conference

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

AGENDA ITEM SUMMARY

Title	Subsequent Local Workforce Development Area (LWDA) Designation
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA) Workforce Policy G105
Action Requested	Review Application for Subsequent Local Workforce Development Area (LWDA) Designation
Background	<p>Under WIOA, the Governor must designate local workforce development areas after consultation with the State Workforce Board, CareerSource Florida, Chief Local Elected Officials (CLEO), and the Local Workforce Development Boards.</p> <p>LWDAs that received an initial designation shall be granted a subsequent designation if, for the two most recent program years, the LWDA performed successfully and sustained financial integrity.</p> <p>The process for an LWDA to submit a subsequent designation requires initial approval by the CLEOs.</p>
Staff Recommendations	Review CSRC Application for Subsequent LWDA Designation for Program Years 2026 and 2027
Supporting Material	CSF Workforce Policy G105 & Application for Subsequent LWDA Designation
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com 866-482-4473 ext. 418

Request for Subsequent Local Workforce Development Area Designation

Name of Local Workforce Development Area:
 Workforce Development Board of the Treasure Coast dba CareerSource Research Coast – LWDB 20

Name of Contact Person: Brian Bauer	Phone Number: 866-482-4473 ext. 418
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Title: President/CEO	Email Address: bbauer@careersourceresourcerc.com
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Date of Request:

Local workforce development areas that receive an initial designation will be granted a subsequent designation if, for the two most recent program years, the local workforce development area performed successfully and sustained fiscal integrity.

Performed Successfully

The term "Performed Successfully" means the local workforce development area met or exceeded the identified levels of performance for primary indicators of performance for the last two consecutive years for which data are available, and the local area has not failed the same individual measure for the last two consecutive program years.

Sustained Fiscal Integrity

The term "Sustained Fiscal Integrity" means that the Secretary of Labor has not made a formal determination, during either of the last two consecutive years preceding the determination regarding such integrity, that either the grant recipient or the administrative entity of the local workforce development area has mis-expended funds provided.

LOCAL AREA LEVELS OF PERFORMANCE

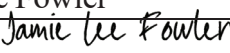
For subsequent designation of local workforce development areas, the local area must include the local negotiated levels of performance and actual levels of performance for the two program years (PY) for which data are available prior to the program year for which designation is requested.

Name of Local Workforce Development Area:				
Measures	Negotiated	Actual	Negotiated	Actual
	PYA 23-24	PYA 23-24	PYA 24-25	PYA 24-25
Adult				
Employed 2 nd Quarter After Exit	91.60	94.70	93.3	93
Median Wages 2 nd Quarter After Exit	\$9,203	\$13,000	\$9,886	\$14,341
Employed 4 th Quarter After Exit	91.10	93.80	91.1	92.2
Credential Attainment Rate	88.00	94.30	85.7	89.4
Measurable Skill Gains	85.30	99.30	71.2	99.3
Dislocated Worker				
Employed 2 nd Quarter After Exit	88.00	100.00	92	88.9
Median Wages 2 nd Quarter After Exit	\$8,638	\$9,749	\$10,000	\$9,661
Employed 4 th Quarter After Exit	92.50	90.90	91	100
Credential Attainment Rate	75.40	100.00	89.2	100
Measurable Skill Gains	77.30	100.00	79.9	100
Youth				
Employed 2 nd Quarter After Exit	81.20	87.30	80.6	87
Median Wages 2 nd Quarter After Exit	\$3,261	\$4,830	\$3,500	\$4,565
Employed 4 th Quarter After Exit	78.80	85.70	73	93.7
Credential Attainment Rate	88.20	79.50	88.2	88.4
Measurable Skill Gains	81.00	98.80	86.3	98.6
Wagner-Peyser				
Employed 2 nd Quarter After Exit	65.30	63.60	66.3	64.2
Median Wages 2 nd Quarter After Exit	\$5,540	\$7,426	\$6,295	\$7,800
Employed 4 th Quarter After Exit	62.60	62.50	62.1	64

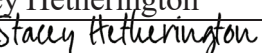
CERTIFICATION AND APPROVAL OF REQUEST

By signing below, the local workforce board chairperson and chief local elected official certify that the local area has performed successfully and sustained fiscal integrity for subsequent designation of the existing local area.

Local Workforce Development Board Chairperson	
Name: James Brann	<small>Signed by:</small>
Signature: 	
Date: 3/17/2026 11:36 AM EDT	

Chief Local Elected Official	
Name: Jamie Fowler	County:
Signature: 	
Date: 3/17/2026 1:58 PM EDT	

Chief Local Elected Official	
Name: Laura Moss - <i>Did not attend meeting</i>	County:
Signature: N/A	
Date:	

Chief Local Elected Official	
Name: Stacey Hetherington	County:
Signature: 	
Date: 3/20/2026 3:13 PM EDT	

The completed request and certification page(s) must be submitted to: LWDBGovernance@commerce.fl.gov.

MEMORANDUM

DATE: February 24, 2026
TO: Local Workforce Development Boards (LWDB)
FROM: Karmyn Hill, Chief, Bureau of One-Stop and Program Support
SUBJECT: Local Workforce Development Board (LWDB) Compliance and Regulatory Submissions

In accordance with [Composition and Certification of Local Workforce Development Boards; Certification of One-Stop Systems; and Direct Service Provider Designation Policy G105](#), local workforce development boards (LWDBs) are required to submit periodic requests to the State Workforce Development Board (SWDB) for approval of specific Workforce Innovation and Opportunity Act (WIOA) regulatory compliance elements. Submissions are reviewed by the Florida Department of Commerce (FloridaCommerce) and CareerSource Florida to make a recommendation to the SWDB.

The following regulatory elements are due for approval:

- Subsequent Local Area Designation
- Board Composition and Certification
- One-Stop Certification
- Direct Service Provider Designation

In accordance with Workforce Policy G105, local area performance will be evaluated and considered as part of the approval process for each regulatory item. Unsatisfactory performance will impact recommendation decisions from FloridaCommerce and CareerSource Florida.

Local workforce area designation and LWDB composition and certification are reviewed for approval every two years. Current approval for these two regulatory requirements will expire for all LWDBs on June 30, 2026. All LWDBs must submit a request for renewal to maintain compliance.

LWDBs must competitively procure their one-stop operator every four years. LWDBs that compete and are selected as the local one-stop operator must submit a request for approval to serve as one-stop operator, along with appropriate documentation. One-stop operator and direct service provider approvals will expire on June 30, 2026, for some LWDBs operating in one or both of these capacities. LWDBs may also submit requests to serve as direct providers of career services. LWDBs with expiring certifications/designations must request approval, and approval must be granted by the SWDB, the CareerSource Florida Board of Directors, to continue to operate in such capacity.

Requests for regulatory compliance elements must be submitted using the appropriate attachments provided herein. Please email the completed, signed documents, along with supporting information to FloridaCommerce at LWDBGovernance@commerce.fl.gov. Timely submission of these requests is essential to maintain board certification, local area designation,

and operational approvals necessary for continued service delivery. Note that conditional approvals may be granted, and those conditions will be noted within notifications provided to any applicable LWDBs.

With this communication, FloridaCommerce is providing a matrix of the above-referenced regulatory elements outlining the current approvals, including expiration dates. LWDBs are encouraged to review the matrix to assist with planning for future regulatory submissions.

Should you have any questions regarding this memorandum, please contact the Governance Team at LWDBGovernance@commerce.fl.gov.

KH/ta

Attachments:

[Evaluation for LWDB Certification Form](#)

[Evaluation for One-Stop Certification Form](#)

[Evaluation for LWDB Direct Service Provider Designation Form](#)

[LWDB Composition Tool](#)

[Subsequent Area Designation Form](#)

[Statement of Intent](#)

[Regulatory Compliance Matrix](#)

cc: Kate Doyle, Deputy Secretary, FloridaCommerce
Adrienne Johnston, President, CareerSource Florida
Jason McCandless, Chief Operating Officer, CareerSource Florida
Wendy Castle, Assistant Deputy Secretary, FloridaCommerce
Victoria Gaitanis, Vice President, CareerSource Florida
Melissa Cueto, Deputy Bureau Chief, FloridaCommerce
Dee Robinson, Workforce Administrator, FloridaCommerce
Shawn Brown, Workforce Administrator, FloridaCommerce
Isabelle Potts, Workforce Administrator, FloridaCommerce
Christa Nelson, WIOA Supervisor, FloridaCommerce



**POLICY
NUMBER**

G105

Workforce Policy

Title:	Composition and Certification of Local Workforce Development Boards; Certification of One-Stop Systems; and Direct Service Provider Designation		
Policy Type:	Governance		
Program:	Workforce Innovation and Opportunity Act		
Effective:	06/08/2016	Revised:	01/28/2026

I. PURPOSE AND SCOPE

Local Workforce Development Boards (LWDBs) are critical in achieving the Governor and State Workforce Development Board’s (SWDB) strategic and operational vision and goals for Florida’s Workforce Development System. The CareerSource Florida Board of Directors, as the SWDB, sets guidelines—aligned with state and federal laws and its strategic goals—to ensure local workforce boards, service providers, and career centers efficiently deliver essential services. Consistent with state and federal requirements,¹ these guidelines support the review, designation, and/or certification of LWDBs, service providers for the one-stop delivery system, and one-stop career centers.

This policy outlines the standards and procedures related to LWDB composition as well as for certifying LWDBs, One-Stop Delivery Systems, and approving LWDBs to directly provide career services.

II. KEY OBJECTIVES AND MEASURABLE PERFORMANCE OUTCOMES

A. Key Objectives

LWDBs must ensure:

- a. LWDB governance meets requirements per state and federal law and is designed to support designated performance outcomes and SWDB-determined strategic objectives.
- b. High-quality, accessible, and integrated one-stop career center services and service providers.

¹ Workforce Innovation and Opportunity Act (WIOA), 20 Code of Federal Regulations (CFR) Parts 676 through 679, and [Chapter 445](#), Florida Statutes.

B. Measurable Performance Outcomes

1. 100% of qualifying LWDBs are certified every two years and meet required LWDB board composition requirements.
2. 100% of qualifying One-Stop Delivery Systems are certified every three years.
3. LWDBs serving as direct providers of workforce services meet requirements to be approved and designated as such.

III. POLICIES AND PROCEDURES

A. Local Workforce Development Board Composition

The Chief Local Elected Official (CLEO) must select members of the LWDB, consistent with the criteria in federal and state law and criteria set by the Governor. The membership of a LWDB must be consistent with WIOA section 107(b). LWDB appointees must not be current members of the local area's Education and Industry Consortium as defined by CareerSource Florida's Workforce Policy. Business representatives appointed to the LWDB shall include the industry sectors of focus identified in the local area WIOA plan. LWDBs should include representation on their boards from businesses in all counties within the local area. LWDBs must make public a current and updated list of their LWDB members on their website and submit a form demonstrating compliance with federal and state requirements² as part of the LWDB Certification process.

LWDB members who no longer hold the position or status that made them eligible appointees must resign or be removed by the CLEO. LWDB vacancies must be filled within a reasonable amount of time, but no more than 12 months from the vacancy occurrence. This process must be described as part of the local plan.

CLEOs are responsible for providing leadership to LWDBs and ensuring not only fiscal and programmatic compliance, but also performance. Consistent with this, a CLEO may remove members of a LWDB, its executive director and/or the designated person responsible for operational and administrative functions of the board for cause. As set forth in section [445.002\(2\), F.S.](#), "for cause" includes lack of performance. Lack of performance includes, but is not limited to, the following:

1. Nonperformance, as more fully set forth in Section III.B. For purposes of removal under this section, an LWDB is determined to have not met the standard if its performance is below 90 percent of the negotiated standard for each performance indicator.
2. Consistent failure to perform on LWDB Letter Grades, the state identified measure of performance, including letter grade performance in identified subgroup populations.
 - a. CareerSource Florida and FloridaCommerce will examine LWDB performance on each of the criteria developed under [s. 14.36\(3\)\(h\)](#) for various populations served, including, but not limited to, veterans, individuals on public assistance as defined in [s. 414.0252\(10\)](#), and businesses. LWDBs consistently underperforming with a single subgroup, as evidenced by two consecutive letter grades of D or a single year with an F for that subgroup, will be required to

² [20 CFR 679.320](#); [Section 445.007, Florida Statutes](#).

submit a LWDB Turnaround Plan, consistent with [Workforce Policy G104 - Sanctions and Other Required Corrective Action for LWDBs Who Fail to Meet Federal and State Standards](#).

B. Local Workforce Development Board Certification and Decertification

LWDBs must be certified every two years. FloridaCommerce provides guidance to complete this process. LWDBs submit requests for certification using standardized forms provided by FloridaCommerce and CareerSource Florida.

CareerSource Florida and FloridaCommerce review submitted documents for completion and compliance with all state laws and federal regulations, using the approved and posted versions of the **LWDB Composition Tool and the *Evaluation for LWDB Certification Form*** to make approval recommendations to the SWDB based on information provided. Conditional approval for certification may be granted for LWDBs seeking certification that require additional time to meet criteria not associated with performance. LWDBs not meeting requirements outlined in the ***Evaluation for LWDB Certification Form*** may not be recommended for full approval.

Obtaining LWDB certification indicates that an LWDB meets minimum requirements to perform critical duties that support the workforce system in a designated local area. The SWDB may take action when the performance or activities of an LWDB do not meet requirements outlined in state board policies or state or federal law. This action can include LWDB decertification.

LWDBs who exhibit the following deficiencies cannot be fully certified and may be decertified, after the provision of notice and 30-day comment period, by the SWDB:³

1. Fraud, abuse, or failure to carry out the functions set forth in WIOA Section 107(d) and [20 CFR 679.370](#).⁴
2. Nonperformance: Failure to meet identified state or federal performance accountability measures for two consecutive program years.
 - a. Chief local elected officials (CLEOs) and their LWDBs will receive a notification from FloridaCommerce annually indicating whether the LWDB met or did not meet statistically adjusted federal performance accountability measures or failed to meet requirements associated with consistent poor performance on state issued LWDB Letter Grades as outlined in Section III - A. For LWDBs not successfully meeting state or federal performance accountability measures, the notification will include a reminder that failure to meet performance requirements in the next consecutive year may result in decertification and outline required actions related to increased monitoring and the provision of technical assistance that must occur during the next year.

Additional criteria for LWDB decertification include those listed below:

- b. Consistent failure to convene a system of stakeholders to support local workforce development activities.
- c. Consistent failure to effectively partner and engage local employers resulting in a measurable decline in measures of employer satisfaction for two consecutive

³ [WIOA Section 107\(c\)\(3\)](#).

⁴ TEGL 11-19 Change 2 | U.S. Department of Labor

- years.
- d. Consistent failure to update LOPs and policies consistent with state law or policies measured through monitoring reports noting this deficiency for two consecutive years.
 - e. Other criteria as specified in [Workforce Policies G104 - Sanctions and Other Required Corrective Action for Local Workforce Development Boards Who Fail to Meet Federal and State Standards](#) and [P88 - Performance Requirements for Local Workforce Development Boards](#).

If a LWDB is decertified, a new LWDB for the designated local workforce development area must be appointed by the identified CLEO contingent upon a reorganization plan developed by FloridaCommerce in consultation with the CLEO. Plans governing LWDB reorganization for certification, including those that involve consolidation of LWDBs, must be approved by the SWDB.⁵

C. Certification of the Local One-Stop Delivery System

Every three years, each local One-Stop Delivery System must be certified.⁶ LWDBs must certify their local One-Stop Delivery Systems unless the LWDB serves or intends to serve as the One-Stop Operator. In such cases, the LWDB must first request approval from the SWDB to operate in that role. Upon submission, CareerSource Florida and FloridaCommerce will review the request for compliance in accordance with all applicable state laws and federal regulations, using the SWDB's standardized ***Evaluation for One-Stop Certification Form***. This form includes minimum criteria—such as measures of effectiveness, accessibility, and continuous improvement—that LWDBs must apply when selecting and certifying each local One-Stop Delivery System. CareerSource Florida and FloridaCommerce review the request and recommend approval to the SWDB when appropriate.

The certification approval of a LWDB to serve as its own One-Stop Operator can be revoked by the SWDB if it is determined that the LWDB no longer meets minimum criteria, including those used to assess the one-stop delivery system's effectiveness, accessibility, and commitment to continuous improvement as outlined in the *Evaluation for One-Stop Certification Form*.

D. Approval of Waiver and Designation of LWDBs as a Direct Provider of Career Services

LWDBs may request to be a direct provider of career services.⁷ For a LWDB to be a direct provider of career services, approval must be granted by the SWDB. LWDBS are not permitted to be designated as direct providers of training services.⁸

FloridaCommerce and CareerSource Florida will guide boards through the application process. CareerSource Florida and FloridaCommerce will review the application and documentation for compliance with all state laws and federal regulations, using the standardized ***Evaluation for LWDB Direct Service Provider Designation Form***.

⁵ WIOA Section 107(c)(3)(C).

⁶ WIOA Section 121(g).

⁷ 20 CFR 679.410(b) and WIOA Section 107(g).

⁸ [Section 445.007\(6\), Florida Statutes](#).

CareerSource Florida and FloridaCommerce will make a recommendation, as appropriate to the SWDB for consideration to designate LWDBs to serve as a direct provider of career services.

A LWDB designated as a direct provider of career services must submit a performance report at the end of each program year during which direct workforce services were provided. The report must contain, at a minimum, the following:

1. An analysis of cost savings as a result of the LWDB providing direct workforce services.
2. A description of improvement in performance outcomes.
3. A description of any “best practices” to be shared with other LWDBs.
4. Evidence that the direct service provision was incorporated into the local WIOA plan within 60 days of receipt of approval to serve as a direct provider of workforce services.

LWDBs must submit the annual performance report by September 30 each year (or when requested by FloridaCommerce). LWDBs submit annual performance reports via email to FloridaCommerce at LWDBGovernance@commerce.fl.gov.

The designation as a direct provider of workforce services may not exceed the duration of the local WIOA plan and may be renewed through the submission of a new request, not to exceed the durations of such subsequent plans. The approval to serve as a direct provider of workforce services can be revoked by the SWDB if determined that it is no longer necessary or for persistent failure to meet associated performance measurements.

IV. IMPLEMENTATION

LWDBs are responsible for conducting annual internal reviews of their governance and service delivery systems, incorporating customer feedback, staff training metrics, and accessibility assessments. LWDBs must update certification criteria, in alignment with SWDB identified criteria, every two years and include them in the WIOA local plan as required under WIOA Section 108 and [20 CFR 679.560](#).

FloridaCommerce will monitor LWDBs and their LOPs annually in consultation with CareerSource Florida to ensure compliance with federal and state requirements. FloridaCommerce and CareerSource Florida will address any deficiencies through the state’s resolution process and consistent with applicable CareerSource Florida policies. These efforts promote continuous improvement, accountability, and consistent quality across Florida’s workforce development system.

Boards that do not meet the requirements outlined in this policy, or that exhibit deficiencies as described in [CareerSource Florida Workforce Policy G104 – Sanctions and Other Required Corrective Action for Local Workforce Development Boards Who Fail to Meet Federal and State Standards](#), may be subject to corrective actions. These may include, but are not limited to:

1. Issuance of a Corrective Notice
2. Imposition of Specific Conditions, including a required Turnaround Plan
3. Application of Sanctions, which may include:

- a. Decertifying the LWDB.
- b. Selecting an alternative entity as defined in WIOA Section 108 to administer the program for the local area.
- c. Merging the local area into one or more other local areas, after consultation with the CLEO.
- d. Making other necessary changes to secure compliance.

FloridaCommerce provides technical assistance and support to LWDBs before initiating corrective actions or sanctions. This assistance may include guidance on corrective action planning, clarification of certification criteria, technical resources, and identification of best practices. The goal is to promote continuous improvement and ensure boards have a fair opportunity to meet federal and state standards before formal sanctions are considered.

V. ATTACHMENTS AND RESOURCES

[Evaluation for LWDB Certification Form](#)

[Evaluation for One-Stop Certification Form](#)

[Evaluation for LWDB Direct Service Provider Designation Form](#)

[LWDB Composition Tool](#)

AGENDA ITEM SUMMARY

Title	Board/Committee Schedule - PY2026-2027
Strategic Plans/Goals	N/A
Policy/Plan/Law	By-Laws of The Workforce Board of the Treasure Coast, Region 20
Action Requested	Review and Approve Board/Committee Schedule for Program Year 2026-2027
Background	Based on the required number of meetings for the Board of Directors stipulated in the by-laws, staff have prepared the meeting calendar for Program Year 2026-2027.
Staff Recommendations	Review and Approve Board/Committee Schedule for PY2026-2027
Supporting Material	PY2026-2027 Board/Committee Schedule
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 x418

Committee/Board Schedule

July '26						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

August '26						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

September '26						
S	M	T	W	T	F	S
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6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

October '26						
S	M	T	W	T	F	S
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4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

November '26						
S	M	T	W	T	F	S
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8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

December '26						
S	M	T	W	T	F	S
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13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

January '27						
S	M	T	W	T	F	S
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3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

February '27						
S	M	T	W	T	F	S
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14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

March '27						
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14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

April '27						
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11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

May '27						
S	M	T	W	T	F	S
						1
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9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

June '27						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

- Youth Council meets quarterly at 8:00am on the third Tuesday
- Programs & Services Committee meets quarterly at 8:00am on the last Wednesday (except November)
- Executive Committee meets monthly at 8:00am on the second Friday after the first Tuesday
- Board of Directors meets quarterly at 8:00am on the last Wednesday (Tentative)
- Workforce Readiness Taskforce meets quarterly on the first Thursday

Members will be notified of any changes in the above schedule. All meetings are held at the Workforce Board of the Treasure Coast, Inc., d/b/a CareerSource Research Coast Administrative Office, located at 4100 Okeechobee Road, Fort Pierce, Unit 90A

AGENDA ITEM SUMMARY

Title	CSRC Paid Holidays & Compressed Work Schedule for PY 2026-2027
Strategic Plans/Goals	N/A
Policy/Plan/Law	DEO Grantee Subgrantee Agreement
Action Requested	Review and Approve CSRC Paid Holidays & Compressed Work Schedule for PY 2026-2027
Background	Per the DEO Grantee Subgrantee agreement, annually before July 1, the Board of Directors must approve the proposed office/staff work schedules to include paid holidays for the upcoming program year.
Staff Recommendations	Approve CSRC Paid Holidays & Compressed Work Schedule PY 2026-2027
Supporting Material	PY2026-2027 Paid Holiday Schedule Memo, Compressed Work Schedule Link: https://careersourcerc.com/wp-content/uploads/2026/04/All-Teams-Compressed-Work-Schedule-PY26-27-FINAL.pdf
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 x.418



Memorandum

To: Brian K. Bauer

From: Jennifer Eimann

Re: PY26-27 Paid Holiday Schedule

Date: April 29, 2026

Of the standard working days in a year, twelve (12) of those days will be paid holidays and are scheduled to occur as listed below per the CareerSource Research Coast Employee Handbook:

- o Independence Day (Obs.), Friday, July 03, 2026
- o Labor Day, Monday, September 07, 2026
- o Columbus Day, Monday, October 12, 2026
- o Veterans Day, Wednesday, November 11, 2026
- o Thanksgiving Day, Thursday, November 26, 2026
- o Thanksgiving Day (Obs.), Friday, November 27, 2026
- o Christmas Day, Friday, December 25, 2026
- o New Year's Day, Friday, January 1, 2027
- o Martin Luther King Day, Monday, January 18, 2027
- o Presidents Day, Monday, February 15, 2027
- o Memorial Day, Monday, May 31, 2027
- o Juneteenth (Obs.), Friday, June 18, 2027

Accepted by Board Chair: _____

Date: _____



AGENDA ITEM SUMMARY

Title	Review and Approve RFP #26-001-YWS Youth Workforce Services Sub-Recipient Recommendation
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Workforce Innovation and Opportunities Act (WIOA)
Action Requested	Review and Approve the Rating Team’s Recommendation for WIOA Youth Services Sub-Recipient Provider 2026-2031.
Background	<p>In accordance with State and Federal procurement requirements, CareerSource Research Coast issued a Request for Proposals (RFP) on February 4, 2026, for the delivery of WIOA Youth Workforce Services for the 2026–2031 program period. Four proposals were received, of which three met the technical requirements and advanced to the evaluation phase. The Rating Team completed its review and scoring process on April 10, 2026.</p> <p>Staff will present the results of the procurement process and the Rating Team’s recommendation for Youth Council consideration</p>
Staff Recommendations	Review and Approve RFP #26-001-YWS Youth Workforce Services Sub-Recipient Recommendation
Supporting Material	RFP 26-001-YWS Youth Workforce Services Sub-Recipient Rating Sheet
Board Staff	Tracey McMorris Vice President of Operations/COO tmcmorris@careersourcerc.com (866) 482-4473 ext. 528



RFP/RFQ COMPOSITE RATING SHEET

RFP/RFQ Title: Youth Workforce Services

RFP/RFQ: RFP-26-001-YWS

Proposer: Eckerd Youth Alternatives Inc.


Rating Team Captain: Tracey McMorris

Rating Team Members: 1. Christina Coble
3. Tracey McMorris

2. Kate Sayger

Rated Elements	Proposers			Comments
	Eckerd	BGCSLC	TCCEED	
1. Proposers Qualifications (15 points max)	14.00	8.00	1.67	Eckerd demonstrates extensive WIOA experience with a strong performance history and established operational capacity. BGCSLC presents relevant youth service experience and strong community presence but lacks direct WIOA program administration experience. TCCEED is a newer organization with limited operating history and no demonstrated experience managing WIOA-funded programs at scale.
2. Understanding (10 points max)	10.00	7.00	3.00	Eckerd demonstrates a comprehensive understanding of WIOA requirements and alignment with CSRC's service delivery model. BGCSLC reflects a general understanding of the work but includes gaps in WIOA-specific requirements, including compliance and allowable activities. TCCEED demonstrates a basic understanding of workforce programming but lacks sufficient detail regarding core WIOA components such as case management and required program elements.
3. Program Design (15 points max)	14.33	9.33	3.67	Eckerd presents a comprehensive, track-based service model that incorporates all required elements and a phased approach to ISY expansion. BGCSLC proposes a 50/50 ISY/OSY model aligned with local priorities but lacks detailed strategies for implementation across both populations. TCCEED focuses primarily on existing programming and work-based learning but does not demonstrate a fully developed WIOA service model.
4. Goals/Objectives (15 points max)	14.00	7.33	1.67	Eckerd provides measurable goals aligned with WIOA indicators, though opportunities exist to strengthen performance targets. BGCSLC identifies general service targets but lacks clearly defined strategies aligned with WIOA performance outcomes. TCCEED does not clearly align goals with WIOA performance requirements and lacks defined strategies for achieving required outcomes.
5. Cost per Participant (15 points max)	7.67	7.33	8.33	Eckerd proposes a higher cost per participant reflective of a comprehensive service model, with opportunities for improved efficiency. BGCSLC presents a reasonable cost structure, though feasibility is uncertain given the proposed scale of services. TCCEED offers a lower cost per participant, which corresponds to a more limited scope of services.
6. Budget (10 points max)	8.00	5.67	6.67	Eckerd provides a detailed and well-aligned budget, though personnel costs are higher than comparable proposals. BGCSLC presents a generally aligned budget with concerns related to staffing capacity and inclusion of unallowable costs. TCCEED reflects limited staffing and resources, raising concerns regarding the ability to deliver required services.
7. Relationships (10 points max)	9.33	8.00	5.67	Eckerd demonstrates extensive, well-defined partnerships supporting service delivery. BGCSLC also presents strong community relationships, though partner roles are not fully defined within the service model. TCCEED demonstrates community connections, but partnerships are not clearly structured to support comprehensive program delivery.
8. Financial Capacity (10 points max)	10.00	8.67	0.00	Eckerd demonstrates strong financial capacity and extensive experience managing grant funding. BGCSLC demonstrates financial stability and the ability to front costs, though WIOA-specific fiscal experience is limited. TCCEED does not demonstrate sufficient financial capacity to support a reimbursement-based contract.
TOTAL POINTS (100 POINTS MAX)	87.33	61.33	30.67	

Rating Team Captain Signature: 

 Digitally signed by Tracey McMorris
Date: 2026.04.14 12:49:29 -04'00'

Date: 4/14/2026

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All work telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.
RFP-26-001-YWS Composite Rating Sheet

AGENDA ITEM SUMMARY

Title	Review and Approve Board Member CSF Contract/COI Exemption Requests - PY 2026-2027
Strategic Goal	Optimal Use of Resources
Policy/Plan/Law	CareerSource Florida Strategic Policy # 2012.05.24.A.2
Action Required	Review and Approve Board Member CSF Contract/COI Exemption Requests - PY 2026-2027
Background	<p>Under CSFL Strategic Policy # 2012.05.24.A.2, the policy establishes criteria and procedures used to address potential conflicts of interest and, when appropriate, “cure” such conflicts and ensure compliance with Public Law 113-128, Workforce Innovation and Opportunity Act (2014), section 445.007(1) and (11), Florida Statutes, and section 112.3143, Florida Statutes.</p> <p>At a board’s discretion, the following may be exempt from the policy described above:</p> <p>Contracts with a board member receiving a grant for workforce services. All contracts between a board and a board member or other person or entity who may benefit financially from a contract must be approved by a two-thirds vote of the board when a quorum has been established. Board members are required to complete a Contract Information Form and a Conflict of Interest Form.</p>
Staff Recommendation	Review and Approve Board Member CSF Contract/COI Exemption Requests - PY 2026-2027
Supporting Materials	Board Member CSF Contract/COI Exemption Request/Form 8B - PY2026-2027
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

Board Member Contract-COI Exemption Form - 2026-2027

Date	Vendor	Party	Description	Purpose	Expense	State of Florida Approved Vendor	Low Bid	Comments
PY 26-27	Cleveland Clinic Indian River Hospital	Lorna Landherr	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with an exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	On-the-Job Training	under \$100,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 26-27	Indian River State College	Dr. Timothy Moore	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with an exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	Approved Training Provider	under \$125,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 26-27	Indian River State College	Dr. Timothy Moore	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	Facility Use Agreement for the Eckerd Connects Career Centers	under \$10,000	n/a	n/a	A contract with a board member's employer, Indian River State College, to receive rent for facility usage at the Pruitt Campus for the Eckerd Connects Career Centers.
PY 26-27	Keiser University	Leslie Kristof	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	Approved Training Provider	under \$125,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 26-27	Moore Solutions, Inc.	Terrance Moore	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	Worksite Agreement for WIOA Youth Work Experience	under \$10,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 26-27	The Porch Factory	Jim Brann	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	On-the-Job Training	under \$30,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 26-27	Treasure Coast Builders Association	Deborah Frazier	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	On-the-Job Training	under \$10,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 26-27	Treasure Coast Technical College	Dr. David Moore	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	Facility Use Agreement for the Eckerd Connects Career Center	under \$10,000	n/a	n/a	A contract with a board member's employer, Treasure Coast Technical College (TCTC), School District of Indian River County, to receive rent for facility usage at TCTC for the Eckerd Connects Career Center.
PY 26-27	Treasure Coast Technical College	Dr. David Moore	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	Approved Training Provider	under \$50,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 26-27	St. Lucie County Board of County Commissioners	Erin Lowry	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	On-the-Job Training	under \$10,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.
PY 26-27	R.V. Johnson Insurance	Kelly Johnson	2012.05.24.A.2 State and Local Workforce Development Board Contracting Conflict of Interest Policy with exemption to the prohibition to allow the workforce boards to provide statutorily-mandated services.	On-the-Job Training	under \$10,000	n/a	n/a	A contract with a board member receiving a grant for workforce services under federal, state, or other governmental workforce programs.



CONTRACT INFORMATION FORM

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

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

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

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

Contractor Contact Phone Number: 772-789-8536

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

Contract Term: PY26-27

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

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

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

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

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

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

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

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

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

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

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann
Print Name

*Must be certified and attested to by the Board Chair

Date



DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

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

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

Local Workforce Development Board: CareerSource Research Coast/LWDB20

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

Contractor Contact Phone Number: 772-462-1411

Description or Nature of Contract: On the Job Training Contract

Description of Financial Benefit*: Financial gain to parent organization

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

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

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

Signature of Board Member/Employee Print Name

Lorna Landherr
Print Name

Date

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

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

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

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

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

LAST NAME – FIRST NAME – MIDDLE NAME Landherr, Lorna	NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE CareerSource Research Coast/LWDB 20
MAILING ADDRESS 1000 36th Street	THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
CITY Vero Beach	COUNTY Indian River
DATE ON WHICH VOTE OCCURRED April 29, 2026	NAME OF POLITICAL SUBDIVISION: MY POSITION IS <input type="checkbox"/> ELECTIVE <input checked="" type="checkbox"/> APPOINTIVE

WHO MUST FILE FORM 8B

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

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

INSTRUCTIONS FOR COMPLIANCE WITH SECTION 112.3143, FLORIDA STATUTES

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

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

* * * * *

ELECTED OFFICERS:

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

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

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

* * * * *

APPOINTED OFFICERS:

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

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

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

APPOINTED OFFICERS (continued)

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

DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, Lorna Landherr, hereby disclose that on April 29, 2026

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

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

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

Date Filed

Signature

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



DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

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

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

Local Workforce Development Board: CareerSource Research Coast/LWDB20

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

Contractor Contact Phone Number: 772-462-1411

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

Description of Financial Benefit*: Financial gain to parent organization

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

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

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

Signature of Board Member/Employee Print Name

Timothy Moore
Print Name

Date

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

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

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

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



CONTRACT INFORMATION FORM

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

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

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

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

Contractor Contact Phone Number: 772-462-4701

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

Contract Term: PY26-27

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

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

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

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

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

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

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

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

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

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

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann
Print Name

*Must be certified and attested to by the Board Chair

Date



CONTRACT INFORMATION FORM

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

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

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

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

Contractor Contact Phone Number: 772-462-4703

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

Contract Term: PY26-27

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

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

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

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

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

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

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

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

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

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

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann
Print Name

*Must be certified and attested to by the Board Chair

Date



DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

I, Angela Browning, a board member, hereby disclose that My employer

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

Local Workforce Development Board: CareerSource Research Coast/LWDB20

Contractor Name & Address: Angela Browning, Indian River State College, 3209 Virginia Ave., Ft. Pierce, FL 34981

Contractor Contact Phone Number: 772-462-1411

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

Description of Financial Benefit*: Financial gain to parent organization

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

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

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

Signature of Board Member/Employee Print Name

Angela Browning
Print Name

Date

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

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

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

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



CONTRACT INFORMATION FORM

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

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

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

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

Contractor Contact Phone Number: 772-462-4701

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

Contract Term: PY26-27

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

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

Description of goods and/or services to be procured: Facility Use Agreement-Facility Usage Pruitt Campus

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

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

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

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

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

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

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

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann
Print Name

*Must be certified and attested to by the Board Chair

Date



DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

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

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

Local Workforce Development Board: CareerSource Research Coast/LWDB20

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

Contractor Contact Phone Number: 772-462-1411

Description or Nature of Contract: Facility Use Agreement-Facility Usage Pruitt Campus

Description of Financial Benefit*: Financial gain to parent organization

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

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

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

Signature of Board Member/Employee Print Name

Timothy Moore
Print Name

Date

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

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

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

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



CONTRACT INFORMATION FORM

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

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

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

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

Contractor Contact Phone Number: 772-462-4701

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

Contract Term: PY26-27

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

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

Description of goods and/or services to be procured: Facility Use Agreement-Facility Usage Pruitt Campus

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

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

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

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

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

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

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

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann
Print Name

*Must be certified and attested to by the Board Chair

Date



DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

I, Angela Browning, a board member, hereby disclose that My employer

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

Local Workforce Development Board: CareerSource Research Coast/LWDB20

Contractor Name & Address: Angela Browning, Indian River State College, 3209 Virginia Ave., Ft. Pierce, FL 34981

Contractor Contact Phone Number: 772-462-1411

Description or Nature of Contract: Facility Use Agreement-Facility Usage Pruitt Campus

Description of Financial Benefit*: Financial gain to parent organization

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

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

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

Signature of Board Member/Employee Print Name

Angela Browning
Print Name

Date

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

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

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

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

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, Angela Browning, hereby disclose that on April 29, 20: 26

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

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

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

Date Filed

Signature

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



CONTRACT INFORMATION FORM

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

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

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

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

Contractor Contact Phone Number: 772-398-9990

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

Contract Term: PY26-27

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

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

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

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

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

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

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

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

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

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
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A draft copy of the related party contract and amendments, as applicable.
Documentation supporting the method of procurement of the related party contract.
A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann
Print Name

*Must be certified and attested to by the Board Chair

Date



DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

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

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

Local Workforce Development Board: CareerSource Research Coast/LWDB20

Contractor Name & Address: Leslie Kristof, Keiser University-Port St. Lucie Campus, Port St. Lucie, FL 34987

Contractor Contact Phone Number: 772-398-9990

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

Description of Financial Benefit*: Financial gain to parent organization

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

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

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

Signature of Board Member/Employee Print Name

Leslie Kristof
Print Name

Date

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

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

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

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

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.
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DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, Leslie Kristof, hereby disclose that on April 29, 2026

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

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

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

Date Filed

Signature

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



CONTRACT INFORMATION FORM

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

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

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

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

Contractor Contact Phone Number: 772-337-4005

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

Contract Term: PY26-27

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

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

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

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

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

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

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

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

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

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

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann
Print Name

*Must be certified and attested to by the Board Chair

Date



DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

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

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

Local Workforce Development Board: CareerSource Research Coast/LWDB20

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

Contractor Contact Phone Number: 772-462-1411

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

Description of Financial Benefit*: Financial gain to parent organization

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

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

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

Signature of Board Member/Employee Print Name

Terrance Moore
Print Name

Date

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

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

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

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

APPOINTED OFFICERS (continued)

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

DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, Terrance Moore, hereby disclose that on April 29, 20: 26

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

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

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

Date Filed

Signature

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



CONTRACT INFORMATION FORM

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

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

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

Contractor Name & Address: James Brann, The Porch Factory, 2904 Okeechobee Rd., Fort Pierce, FL 34947

Contractor Contact Phone Number: 772-758-2698

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

Contract Term: PY26-27

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

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

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

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

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

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

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

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

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

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

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

William Armstead
Print Name

*Must be certified and attested to by the Board Chair

Date



DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

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

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

Local Workforce Development Board: CareerSource Research Coast/LWDB20

Contractor Name & Address: James Brann, The Porch Factory, 2904 Okeechobee Rd., Ft. Pierce, FL 34947

Contractor Contact Phone Number: 772-758-2698

Description or Nature of Contract: On the Job Training Contract

Description of Financial Benefit*: Financial gain to parent organization

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

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

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

Signature of Board Member/Employee Print Name

James Brann
Print Name

Date

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

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

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

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

APPOINTED OFFICERS (continued)

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

DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, James Brann, hereby disclose that on April 29, 2026

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

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

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

Date Filed

Signature

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



CONTRACT INFORMATION FORM

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

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

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

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

Contractor Contact Phone Number: 772-336-8222

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

Contract Term: PY26-27

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

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

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

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

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

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

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

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

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

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

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann
Print Name

*Must be certified and attested to by the Board Chair

Date



DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

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

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

Local Workforce Development Board: CareerSource Research Coast/LWDB20

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

Contractor Contact Phone Number: 772-336-8222

Description or Nature of Contract: On the Job Training Contract

Description of Financial Benefit*: Financial gain to parent organization

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

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

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

Signature of Board Member/Employee Print Name

Deborah Frazier
Print Name

Date

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

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

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

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

APPOINTED OFFICERS (continued)

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

DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, Deborah Frazier, hereby disclose that on April 29, 2026

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

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

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

Date Filed

Signature

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



CONTRACT INFORMATION FORM

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

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

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

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

Contractor Contact Phone Number: 772-564-3150

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

Contract Term: PY26-27

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

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

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

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

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

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

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

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

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

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

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann
Print Name

*Must be certified and attested to by the Board Chair

Date



DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

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

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

Local Workforce Development Board: CareerSource Research Coast/LWDB20

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

Contractor Contact Phone Number: 772-564-3150

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

Description of Financial Benefit*: Financial gain to parent organization

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

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

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

Signature of Board Member/Employee Print Name

David Moore
Print Name

Date

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

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

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

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



CONTRACT INFORMATION FORM

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

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

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

Contractor Name & Address: Christi Shields, School District of Indian River County/Treasure Coast Technical College, 4680 28th Court, Vero Beach, FL 32967

Contractor Contact Phone Number: 772-564-3150

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

Contract Term: PY26-27

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

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

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

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

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

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

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

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

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

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

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

Christi Shields
Print Name

*Must be certified and attested to by the Board Chair

Date



DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

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

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

Local Workforce Development Board: CareerSource Research Coast/LWDB20

Contractor Name & Address: Christi Shields, School District of Indian River County/Treasure Coast Technical College, 4680 28th Court, Vero Beach, FL 32967

Contractor Contact Phone Number: 772-564-3150

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

Description of Financial Benefit*: Financial gain to parent organization

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

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

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

Signature of Board Member/Employee Print Name

Christi Shields
Print Name

Date

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

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

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

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



CONTRACT INFORMATION FORM

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

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

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

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

Contractor Contact Phone Number: 772-564-3150

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

Contract Term: PY26-27

Value of the Contract with no extensions or renewals exercised: Under \$50,000

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

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

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

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

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

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

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

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

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

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann
Print Name

*Must be certified and attested to by the Board Chair

Date



DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

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

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

Local Workforce Development Board: CareerSource Research Coast/LWDB20

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

Contractor Contact Phone Number: 772-564-3150

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

Description of Financial Benefit*: Financial gain to parent organization

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

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

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

Signature of Board Member/Employee Print Name

David Moore
Print Name

Date

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

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

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

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



CONTRACT INFORMATION FORM

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

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

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

Contractor Name & Address: Christi Shields, School District of Indian River County/Treasure Coast Technical College, 4680 28th Court, Vero Beach, FL 32967

Contractor Contact Phone Number: 772-564-3150

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

Contract Term: PY26-27

Value of the Contract with no extensions or renewals exercised: Under \$50,000

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

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

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

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

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

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

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

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

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Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.
A draft copy of the related party contract and amendments, as applicable.
Documentation supporting the method of procurement of the related party contract.
A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann
Print Name

*Must be certified and attested to by the Board Chair

Date



DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

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

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

Local Workforce Development Board: CareerSource Research Coast/LWDB20

Contractor Name & Address: Christi Shields, School District of Indian River County/Treasure Coast Technical College, 4680 28th Court, Vero Beach, FL 32967

Contractor Contact Phone Number: 772-564-5006

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

Description of Financial Benefit*: Financial gain to parent organization

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

[X] have no relative who is a member of the board or an employee of the board; OR
___ have a relative who is a member of the board or an employee of the board, whose name is:

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

Signature of Board Member/Employee Print Name

Christi Shields
Print Name

Date

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

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

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

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

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, Christi Shields, hereby disclose that on April 29, 2026

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 School District of Indian River County/Treasure Coast Technical College, by whom I am retained; or
- inured to the special gain or loss of _____, which is the parent organization or subsidiary of a principal which has retained me.

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

Date Filed

Signature

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



CONTRACT INFORMATION FORM

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

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

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

Contractor Name & Address: St. Lucie County Board of County Commissioners, 2300 Virginia Avenue, Fort Pierce, FL 34982

Contractor Contact Phone Number: 772-462-1411

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

Contract Term: PY 26-27

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

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

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

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

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

The nature of the conflicting interest in the contract: Financial benefit to the St. Lucie County Board of County Commissioners

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

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

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

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
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A draft copy of the related party contract and amendments, as applicable.
Documentation supporting the method of procurement of the related party contract.
A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann
Print Name

*Must be certified and attested to by the Board Chair

Date



DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

I, Erin Lowry, a board member, hereby disclose that _____

Or "Other"(describe): St. Lucie County Board of County Commissioners could benefit financially from the contract described below:

Local Workforce Development Board: CareerSource Research Coast/LWDB20

Contractor Name & Address: St. Lucie County Board of County Commissioners, 2300 Virginia Avenue, Ft. Pierce 34982

Contractor Contact Phone Number: 772-462-1411

Description or Nature of Contract: On the Job Training Contract

Description of Financial Benefit*: Financial benefit to the St. Lucie County Board of County Commissioners

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

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

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

Signature of Board Member/Employee Print Name

Erin Lowry
Print Name

Date

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

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

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

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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.
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DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, Erin Lowry, hereby disclose that on April 29, 2026

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 St. Lucie County Board of County Commissioners, 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:

A required pre-approval of potential On-the-Job Training (OJT) contracts was considered by the CareerSource Research Coast Board of Directors on February 4, 2026. I serve on the Board of Directors in the capacity as St Lucie County's representative of the Community Services Block Grant and as a representative of the St. Lucie County Board of County Commissioners. The St. Lucie Board of County Commissioners will be the contracting party/benefiting entity of this potential OJT Contract. I am disclosing this conflict of interest.

Date Filed

Signature

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



CONTRACT INFORMATION FORM

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

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

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

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

Contractor Contact Phone Number: 772-287-3366

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

Contract Term: PY26-27

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

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

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

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

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

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

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

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

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

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
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A draft copy of the related party contract and amendments, as applicable.
Documentation supporting the method of procurement of the related party contract.
A copy of the board meeting and committee meeting minutes that document the discussion and approval of the related party contract.

I certify that the above is true and correct.

Signature of Board Chair / Vice Chair*

James Brann
Print Name

*Must be certified and attested to by the Board Chair

Date



DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

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

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

Local Workforce Development Board: CareerSource Research Coast/LWDB20

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

Contractor Contact Phone Number: 772-287-3366

Description or Nature of Contract: On the Job Training Contract

Description of Financial Benefit*: Financial gain to parent organization

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

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

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

Signature of Board Member/Employee Print Name

Kelly Johnson
Print Name

Date

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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.
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DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, Kelly Johnson, hereby disclose that on April 29, 20: 26

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 RV Johnson Insurance, by whom I am retained; or
- inured to the special gain or loss of _____, which is the parent organization or subsidiary of a principal which has retained me.

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

Date Filed

Signature

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

Agenda Item 13

AGENDA ITEM SUMMARY

Title	One-Stop Operator Quarterly Reports 3rd Quarter - PY 2026-2027
Strategic Plans/Goals	Effective Utilization of Current and Timely Operational Intelligence for all Stakeholders
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/Role of the One-Stop Operator
Action Requested	None - Information Only
Background	<p>The One-Stop Operator’s major function is the coordination of the service delivery among the required One-Stop System Partners and their programs for the Local Workforce Development Area 20 (LWDA 20), CareerSource Research Coast. The One-Stop Operator will navigate between the One-Stop Partners to ensure there is coordination of service delivery for employers and job seekers within the LWDA 20 One-Stop System.</p> <p>The One-Stop Operator requires a submission of written, quarterly reports to the Board of Directors regarding the progress towards the established goals of the One-Stop Operator.</p>
Staff Recommendations	None - Information Only
Supporting Material	One-Stop Operator Quarterly Report - Q3 PY 2026-2027
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

Workforce Coordination Consulting, LLC
COMPREHENSIVE ONE-STOP CAREER CENTER
Renaissance Business Park
4100 Okeechobee Road, Suite 90 A
Ft. Pierce, FL 34947

QUARTERLY PARTNERS MEETING AGENDA
April 7, 2026
10:00am

1. Welcome and Introductions
2. Reminders:
 - Quarterly Timesheets
 - Invoices
 - Sign In Sheets
3. Crosswalk/Referrals
4. Customer Satisfaction Survey
5. Partner Updates:
 - IRSC/CTE
 - IRSC/Adult Education
 - Farmworker Career Development Program
 - Vocational Rehabilitation
 - Division of Blind Services
 - AARP Foundation
 - St. Lucie County Community Services
6. Open Discussion

COMPREHENSIVE ONE-STOP CAREER CENTER QUARTERLY PARTNERS MEETING 4/07/2026 MINUTES

The Partner's Meeting was held at the CareerSource Research Coast Comprehensive One-Stop Career Center, Ft. Pierce. The following members were present:

- Glenda Harden, Workforce Coordination Consulting, LLC.
- Eleanor Eberhart-Chin, Workforce Coordination Consulting, LLC.
- Gregory McDonald, CareerSource Research Coast
- Michael Hidalgo, Indian River State College
- Sherika Perez, Division of Blind Services

AARP and Vocational Rehabilitation was not in attendance and St. Lucie Community Services and the Farmworker Career Development Program were excused. The Quarterly Partner's Meeting Agenda was emailed to all partners in advance, extra copies of the Agenda were available to all in attendance. Welcome and introductions followed.

Agenda items covered by the One-Stop Operator included reminders regarding the Quarterly timesheet records that partners need to complete, the method of invoicing for the time Partners are physically present at the One-Stop Career Center and the importance of maintaining the Sign-In Sheets. The first-time records completed by the Partners for the second quarter were received and verified. Invoicing for the Partner's time spent during the second quarter was sent to all partners in February and invoices have been settled. Time records and invoices for the third quarter (January through March) will be sent to all Partners this month. Partners were reminded to make sure their staff correctly utilize the Career Center's Sign In/Out sheets. The Partner "IN/OUT Board" will also be utilized to inform CSRC staff, customers and partners of Partner presence at the Center.

Partners were asked to submit a schedule of the dates and times their staff will be available to provide their services onsite at the One-Stop Career Center. Partner Schedules will be placed in a Calendar which will be provided to their organization and staff at CSRC. Eleanor Eberhart-Chin will work with Gregory McDonald, Center Manager, to coordinate the schedule between the Partners and CSRC to create a monthly/quarterly calendar. A framed calendar of the Partners' schedule is placed at the entrance to the One-Stop Career Center to inform customers when each Partner is physically present.

The Crosswalk Referral System was discussed. Workforce Coordination Consulting requests that each partner send a monthly/quarterly report regarding the referrals they have made to their

customers to other organizations. Partners were reminded to send this report in a timely manner.

The Customer Satisfaction Survey was discussed. There were no results for this third quarter. Suggestions were made and discussed to improve this outcome. As the Partners requested, the QR Code for the Customer Satisfaction Survey has been placed on the laptops in the cubicles designated for the Partner staff.

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

The Division of Blind Services reported their program is in the process of becoming fully staffed which will enable them to spend more time physically present at the One-Stop Career Center.

Indian River State College reported the college is transitioning into new platforms and all departments are undergoing training to reduce the learning curve. The Apprenticeship Program is now under the Department of Workforce. The Apprenticeship Program is focusing on opening new apprenticeship training/opportunities that meet the needs of employer demands.

St. Lucie County Community Services, although not physically present at the meeting, provided the One-Stop Operator with their updates. St. Lucie County is opening their rental assistance program on April 13, 2026 and their Summer Camp Program on April 16, 2026. Information regarding these programs is available on their website.

AARP provided the One-Stop Operator their new contact and reported their organization is still lacking staff to serve several workforce areas, including CareerSource Research Coast.

The CareerSource Research Coast One-Stop Career Center reported they have three positions available: Migrant Seasonal Farmworker, Welfare Transition/SNAP Career Planner, Martin County Business Navigator. Events held by the Career Center this month are Job Fairs held on 4/9/26 and 4/29/26. Student Career Events will be held 4/21, 4/24 and 4/29. The Summer of Success Program has been opened and flyers regarding this Program are posted at the front of the Career Center. The One-Stop Career Center held an Active Shooter Training for all staff which was very informative. Information regarding this training will be provided to Partners at their request.

The meeting adjourned at approximately 11:20.

One-Stop Operator Quarterly Report Second Quarter Program Year 2024-25

Date: 01/10/2025

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

Workforce Coordination Consulting, LLC (WCC) continues as the Comprehensive One-Stop Career Center Operator as their contract was renewed and signed effective July 1, 2025 through June 30, 2026. Planning and Oversight meetings have been held during this quarter with CareerSource Research Coast (CSRC) Administration and the WCC partners, Eleanor Eberhart-Chin and Glenda Harden. WCC's major function is the coordination of the service delivery among the Comprehensive One-Stop Partners and their programs. WCC is responsible for navigating between the Comprehensive One-Stop partners to ensure there is coordination of service delivery for employers and career seekers within the LWDB 20 One-Stop System.

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

MOU – The MOU covering the period of July 2024 through June 2027 has been updated, finalized and signed by all partners.

IFA - Under the IFA, the Partners are invoiced quarterly based on the number of hours their staff are physically present at the Center. Partners were sent the Time Tracking Record on 1/6/26 for completion to document the time their staff were physically present and providing their services at the One-Stop Career Center for the second quarter of the Program Year (Oct.2025 – Dec.2025). The first invoices for the current Program Year were sent to the Partners on 2/9/26, after the time records were received and verified. CSRC reports that all invoices for the second quarter have been paid. Time tracking records for the third quarter (Jan., Feb., March) will be sent to the partners in April 2026.

3. Coordination and Collaboration Activities

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

As required under their contract with CareerSource Research Coast, Workforce Coordination Consulting, LLC. is required to make four visits to the One-Stop Career Center. The first visit was made to the One-Stop in their new venue on December 11, 2025. Two cubicles have been designated for the Partners to utilize when they are present at the Center. The cubicles are equipped with laptops and technical assistance is available. Career Center staff, Partners that were present and Management were interviewed. Feedback was very positive from all parties. The second visit was made to the One-Stop on 3/6/26.

The Program Year 25-26 second Quarter Partner Meeting was held in person at the Comprehensive One-Stop Career Center on 1/20/2026. The third Quarter Partner Meeting was held in person at the Comprehensive One-Stop Career Center on 4/7/26.

Customer Satisfaction Survey - As of this report, there have been no Customer Satisfaction Surveys completed for the second quarter. The survey is always an Agenda Item for the Quarterly Partner Meetings. Discussion and strategies to improve the completion of the surveys occurs. As the latest strategy, the QR code

One-Stop Operator Quarterly Report Second Quarter Program Year 2024-25

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for the Customer Satisfaction Survey is displayed on one of the laptops located in the Partner's cubicles. Partners are always reminded to have any customers they deal with at the One-Stop Career Center to complete the survey.

Client Referrals - CareerSource Research Coast sent seven referrals to other agencies and received 34 referrals from other agencies, St. Lucie County Community Services and Indian River State College report that no referrals were sent or received by their agencies. As of this report, all Partners have not submitted their referral reports for the second quarter (October through December 2025). Reminders regarding this report have been sent to all Partners and the responses indicate the reports are forthcoming. Referrals are submitted through the Crosswalk system which is being utilized by all partners. It is the responsibility of the One-Stop Operator, WCC, to monitor and evaluate the utilization and effectiveness of the system.

4. Conflict of Interest

Currently, WCC has no conflicts of interest.

5. Complying with Federal Regulations and Procurement Policies

CSRC followed federal guidelines and procurement policies as outlined in their Administrative Plan in procuring and contracting with Workforce Coordination Consulting, LLC as the Comprehensive One-Stop Career Center Operator. WCC is responsible for monitoring the Comprehensive One-Stop Career Center System. WCC has created a monitoring/compliance tool and met with CSRC Administration for review and approval of the tool. WCC plans to monitor the Comprehensive One-Stop Career Center System in the third quarter of the 2025 -2026 Program Year.

6. Recommendations

The main recommendation has been to establish a One-Stop Career Center venue which ensures there is coordination of service delivery for employers and career seekers within the LWDB 20 One-Stop System. The physical presence of the One-Stop Career System Partners at the Center is a proven delivery method to achieve this goal. With the new venue and the Partners now physically present at the Career Center, providing their services, progress to achieve this goal is happening!

AGENDA ITEM SUMMARY

Title	Workforce Readiness Taskforce 1st Quarter, 2026 Report
Strategic Plans/Goals	Administration & Strategic Planning
Policy/Plan/Law	CareerSource Florida Strategic Policy - Education and Industry Consortiums
Action Requested	Review Workforce Readiness Taskforce (Education and Industry Consortium) Quarterly Report
Background	<p>Section 445.007(15), Florida Statutes, requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated workforce service delivery area.</p> <p>This policy requires local workforce development boards to appoint education and industry consortiums composed of local leaders who provide independent information from stakeholders in their local area. Local workforce development boards shall consider this information in creating strategies and local plans that describe efforts to provide educational and workforce opportunities to businesses and job seekers. The goal is to align educational programming with industry needs at the local level.</p> <p>This policy applies to local education and industry consortiums and the local workforce development boards that appoint them. Education and industry consortiums act as independent advisory groups. Members do not have any direct or implied authority over local workforce development boards, their membership, or employees.</p>
Staff Recommendations	Review Workforce Readiness (Education and Industry Consortium) 1st Quarter Report
Supporting Material	Workforce Readiness Taskforce 1st Quarter, 2026 Report Link: Workforce-Readiness-Taskforce-Quarterly-Report-Q1-2026.pdf
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

AGENDA ITEM SUMMARY

Title	Chair's Report
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Board Procedure
Action Requested	None - Information Only
Background	<p>The Chairperson will share information at the meeting with the Board regarding Ad Hoc Search - Board Membership Update.</p> <ul style="list-style-type: none"> • Nomination for Appointments to the Workforce Development Board of the Treasure Coast: <ul style="list-style-type: none"> - Brian Cartland, VP, Economic Development, IRC Economic Development - Sharon Wright, Area 3 Director, Florida Division of Vocational Rehabilitation - Wes McCurry, President, Economic Development Council of SLC • Open Seats - Business - Replacement for David Bean and Werner Bols
Staff Recommendations	None - Information Only
Supporting Material	None- Information Only
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com 1-866-482-4473 ext. 418</p>

Agenda Item 16

AGENDA ITEM SUMMARY

Title	President's Report
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Board Procedure
Action Requested	None - Information Only
Background	<p>Each meeting the President/CEO shares information with the Board on events and issues important for Board members to know.</p> <ul style="list-style-type: none">i. Local Workforce Development Membership Composition and Certificationii. Primary Indicators of Performance - 2nd Quarteriii. Letter Grade Performance Update - 2nd Quarter PY 2025-2026iv. Office Closure: Combined Open Enrollment and Staff Training Day
Staff Recommendations	None - Information Only
Supporting Material	LWD Membership Composition, Indicators of Performance, Letter Grade Performance Link
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

AGENDA ITEM SUMMARY

Title	Local Workforce Development Board Membership Composition and Certification
Strategic Plans/Goals	Effective Utilization of Current and Timely Operational Intelligence for all Stakeholders
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/Role of LWDB's
Action Requested	Review Local Workforce Development Board Membership Composition Roster
Background	<p>The Governor, in partnership with CareerSource Florida (CSFL), establishes criteria for use by the Local Chief Elected Official (LCEO) in the appointment of members to the LWDB's. The LCEO shall be the appointing authority for the members of the LWDB's.</p> <p>The LCEO shall develop a process for soliciting LWDB nomination and for selecting LWDB members, consistent with federal and state law and CSFL Workforce Policy G105.</p>
Staff Recommendations	Review Local Workforce Development Board Membership Roster
Supporting Material	LWDB Roster 2026-2027
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866)482-4473 ext. 418</p>

Board of Directors List Tool

Program Year (PY) 2025-2026

Date of Review:							
Name of Board Member	Position on Board	Term of Appointment	Appointment Date	Name of Member's Business, Company, or Employer and Title or Position	Representation ****	Additional Representation	Additional Representation
<p>Complete the Board of Directors template below. Include current board members at the time this document is completed including vacant seats from each Sector, if applicable. In the Representation column, you must choose an option from the drop-down menu. If a board member has more than one affiliation, select the additional representation category from Column F. Once the Board of Directors template has been completed, check the table located at the bottom of the page. The table calculates both Business and Workforce percentages, as well as the required board roles.</p> <p>Please note: <u>Providing a reference to a website will not satisfy this request</u>. The template holds up to 36 board members. If you have more than 36 members on your board reach out to your Programmatic Monitor Unit directly.</p>					Sector & Description (See 20 CFR 679.320) Choose Sector and Description from the drop down menu	Sector & Description (See 20 CFR 679.320) Choose Sector and Description from the drop down menu	Sector & Description (See 20 CFR 679.320) Choose Sector and Description from the drop down menu
	Ex. Member, Chair, Secretary etc.	Ex. MM/DD/YY- MM/DD/YY	Ex. MM/DD/YY				
Werner Bols	Member	07/01/22 06/30/26	7/1/1983	Bols Construction, President	Business: Member of Small Business		
Pamela Burchell	Member	07/01/23 06/30/27	1/28/2008	Cleveland Clinic Indian River Medical Center, Director, Human Resources	Business: Member of Small Business		
Jim Brann	Chair	07/01/23 06/30/27	3/11/2020	The Porch Factory, President	Business: Member of Small Business		
Robert Cenk	Member	07/01/24 06/30/28	9/28/2015	Ce. Ce. Contracting, President	Business: Member of Small Business		
Kevin Staten	Member	07/01/23 06/30/27	7/1/2023	Bank of America, SVP Relationship Manager	Business: Other Business Sector		
Wiliam Armstead	Vice Chair	07/01/23 06/30/27	7/1/2023	Boys & Girls Clubs of SLC, President	Business: Other Business Sector	Workforce: Organization with experience and expertise in addressing the employment, training, or education needs of eligible youth	
Dr. Timothy Moore	Member	07/01/23 06/30/27	8/1/2020	Indian River State College, President	Other: Institution of higher education providing workforce investment activities	Other: Training provider administering adult education and literacy activities under WIOA title II	
Mike Kauffmann	Member	07/01/22 06/30/26	7/1/2022	Local 402 Ironworkers, Apprenticeship, Training Director	Workforce: Labor organization in the local area	Workforce: Union affiliated registered apprenticeship program	
Terrance Moore	Member	07/01/24 06/30/28	7/1/2012	Moore Solutions Inc., Chief Executive Officer	Business: Member of Small Business		
Lorna Landherr	Member	07/01/23 06/30/27	7/1/2023	Cleveland Clinic Martin Health Systems, Director Human Resource Services	Business: Other Business Sector		
Dr. Jonathan Prince	Member	07/01/22 06/30/26	7/1/2022	St. Lucie Public Schools, Superintendent	Workforce: Non-union affiliated registered apprenticeship program	Workforce: Organization with experience and expertise in addressing the employment, training, or education needs of eligible youth	Other: Program carried out under title I of the Rehabilitation Act o 1973, other than sec.112 or part C of that title
David Freeland	Member	07/01/24 06/30/28	4/1/2018	SLC Classroom Teachers' Association/Classified Unit Local 3616, CTA/CU President	Workforce: Labor organization in the local area		
Jose Capellan	Member	07/01/23 06/30/27	11/1/2020	SLC Veteran Services, Veteran Service Officer	Workforce: Organization that serves veterans	Workforce: Organization which provides or supports competitive integrated employment for individuals with disabilities	
Erin Lowry	Member	12/01/24 11/30/28	12/1/2024	SLC BOCC, Commissioner	Other: Governmental and economic and community development entities who represent transportation, housing, and public assistance programs	Other: Economic and community development entity	

Organization which provides or supports competitive integrated employment for individuals with disabilities	1		May include 1 or more Workforce representatives
Organization with experience and expertise in addressing the employment, training, or education needs of eligible youth	3		May include 1 or more Workforce representatives
Vacant Workforce Sector Seats	0		Vacant Seats
Board Members in Other Sectors	10	50%	Remaining Percentage
Training provider administering adult education and literacy activities under WIOA title II	3	Meets minimum	Must include 1 representative
Institution of higher education providing workforce investment activities	2	Meets minimum	Must include 1 representative
Economic and community development entity	1	Meets minimum	Must include 1 representative
State Employment Service Office under Wagner Peysner Act (29 U.S.C. 49) serving the local area	0		Must include 1 representative - FloridaCommerce realizes that this position may not be filled.
Program carried out under title I of the Rehabilitation Act of 1973, other than sec.112 or part C of that title	1	Meets minimum	Must include 1 representative
Other Entity that administers education and training activities, represents local educational agencies or community-based organizations that have expertise in addressing the education or training needs for individuals with barriers to employment	1		May include representatives
Governmental and economic and community development entities who represent transportation, housing, and public assistance programs	1		May include representatives
Philanthropic organizations serving the local area	0		May include representatives
Other appropriate individuals as determined by the chief elected official	0		May include representatives
Vacant Other Seats	1		Vacant Seats
Member Count	20		
Representation Count	34		

Agenda Item 16aii

AGENDA ITEM SUMMARY

Title	LWDB 20 Primary Indicators of Performance for Program Year (PY) 2025-2026 2nd Quarter
Strategic Plans/Goals	Clear, Credible, and Trustworthy Commitments and Projects
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA) Title I Programs and Title III Wagner-Peyser (WP) Act; Training and Employment Guidance Letter No. 09-20
Action Requested	None - Information Only
Background	<p>The State of Florida must negotiate and agree upon performance levels for WIOA and WP programs funded by the United States Department of Labor, Employment and Training Administration. Once the state levels are established, the Department of Commerce (FLORIDACOMMERCE) must negotiate and reach agreements with the Local Workforce Development Boards regarding their local performance targets.</p> <p>Staff will review CareerSource Research Coast's performance for the 2nd quarter of PY2025-20256</p>
Staff Recommendations	None - Information Only
Supporting Material	LWDB 20 PY2025-2026 2nd Quarter Performance
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 518</p>

Measures	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 2nd Quarter Performance	PY2025-2026 % of Performance Goal Met For Q2	PY2025-2026 Performance Goals
Adults:												
Employed 2nd Qtr After Exit	97.1	104.07	94.6	101.39	93	99.68	93.3	91.9	98.50	88.2	94.53	93.3
Median Wage 2nd Quarter After Exit	\$14,129	142.92	\$14,963	151.35	\$14,341	145.06	\$9,886	\$14,879	150.51	\$13,735	138.93	\$9,886
Employed 4th Qtr After Exit	93.3	102.41	94	103.18	92.2	101.21	91.1	92.9	101.98	92.2	101.21	91.1
Credential Attainment Rate	94.1	109.80	92.5	107.93	89.4	104.32	85.7	89.7	104.67	88.2	102.92	85.7
Measurable Skill Gains	89.9	126.26	86.9	122.05	99.3	139.47	71.2	85.9	120.65	86.9	122.05	71.2
Dislocated Workers:												
Employed 2nd Qtr After Exit	100	108.70	88.9	96.63	88.9	96.63	92	87.5	95.11	85.7	93.15	92
Median Wage 2nd Quarter After Exit	\$9,946	99.46	\$10,113	101.13	\$9,661	96.61	\$10,000	\$7,772	75.82	\$8,092	78.95	\$10,250
Employed 4th Qtr After Exit	100	109.89	100	109.89	100	109.89	91	88.9	97.69	88.9	97.69	91
Credential Attainment Rate	100	112.11	100	112.11	100	112.11	89.2	100	112.11	100	112.11	89.2
Measurable Skill Gains	88.9	111.26	75	93.87	100	125.16	79.9	100	125.16	77.8	97.37	79.9
Youth:												
Employed 2nd Qtr After Exit	90.5	112.28	91.2	113.15	87	107.94	80.6	80.8	100.25	77.8	96.53	80.6
Median Wage 2nd Quarter After Exit	\$4,802	137.20	\$4,909	140.26	\$4,565	130.41	\$3,500	\$4,608	121.26	\$4,608	121.26	\$3,800
Employed 4th Qtr After Exit	90.9	124.52	93.3	127.81	93.7	128.36	73	92.6	126.85	87	119.18	73
Credential Attainment Rate	87.2	98.87	88.4	100.23	88.4	100.23	88.2	79.1	87.79	72.5	80.47	90.1
Measurable Skill Gains	90.2	104.52	96.3	111.59	98.6	114.25	86.3	93.5	108.34	94.2	109.15	86.3
Wagner Peyser:												
Employed 2nd Qtr After Exit	65.5	98.79	65	98.04	64.2	96.83	66.3	63.4	95.63	62.8	94.72	66.3
Median Wage 2nd Quarter After Exit	\$7,716	122.57	\$7,862	124.89	\$7,800	123.91	\$6,295	\$7,670	121.84	\$7,526	119.56	\$6,295
Employed 4th Qtr After Exit	62.5	100.64	63.8	102.74	64	103.06	62.1	64.1	103.22	64.3	103.54	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, 2025
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA)/Role of
Action Requested	LWDB's None - Information Only
Background	<p>The Reimagining Education and Career Help (REACH) Act calls for each local workforce development board in Florida to be assigned a letter grade annually based on performance criteria developed by the Governor's REACH Office. The CareerSource Florida Board of Directors assigns and makes public a letter grade for each local workforce development board.</p> <p>Letter grades are assigned to local workforce development boards annually by Oct. 15, following the close of the program year. Below is the link to the 2nd- Quarter performance update by local workforce development board for the program year 2025.</p>
Staff Recommendation	None - Information Only
Supporting Material	<p>Link to: https://analytics.careersourceflorida.com/LetterGrades/Performance</p>
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

AGENDA ITEM SUMMARY

Title	Office Closure: Combined Open Enrollment and Staff Training Day
Strategic	Operational Intelligence
Plans/Goals	None - Information Only
Policy/Plan/Law	None - Information Only
Background	Pursuant to governance policies, any decision to close a company office must be reviewed and formally approved by the Board of Directors before it can proceed. This applies regardless of the size or location of the office in question.
Staff Recommendations	Request to office closures for one day of combined open enrollment and staff training.
Supporting Material	None - Information Only
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

Agenda Item 17

AGENDA ITEM SUMMARY

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

Agenda Item 18

AGENDA ITEM SUMMARY

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