



Executive Committee Meeting

REVISED **MEETING AGENDA**

Meeting Details

Date: Friday, June 12, 2026

Time: 8:00 am

Location: In-person

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

MS Teams Virtual Meeting Access:

Access Code: 513 378 573#

Phone: 772-800-5467

URL: Link below:

<https://teams.microsoft.com/meet/210340688529641?p=WfYzH4x93RyzcXcM44>

Opening Remarks

1. Welcome & Attendance
2. Conflict of Interest Declaration

Voting Items

3. Review and Approve April Financial Report - PY2025-2026
4. Review and Approve Renewable Vendor Contract for Legal Services - PY2026-2027
5. Review and Approve Letter of Intent for WIOA Youth Service Subrecipient Contact - PY2026-2027
6. Individual Training Account (ITA) Waiver Request - PY2026-2027
7. Review and Approve Nomination for Slate of Officers
8. Consent Agenda
 - a. Review and Approve Welfare Transition Program (WT) - Incentive Payments Policy
 - b. Review and Approve Workforce Innovation and Opportunity Act (WIOA) Youth - Supportive Services Policy
 - c. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Individual Training Account Policy
9. Review and Approve Declaration of Authority - Daniel Moore, Designee for Michael Maine, Superintendent, Martin County School District
10. Review and Approve Request for Quote RFQ #26-001-MTR for Independent Monitoring

Information/Discussion

11. Primary Indicators of Performance 3rd Quarter - PY2025-2026
12. CareerSource Research Coast (CSRC) Updates
 - Official Notification to File Form 1 - Calendar Year 2025
 - Ad Hoc Search Committee Board Membership - Deb Frazier Recommendation Rob MacKeen, Executive Director, Marine Industry Association
 - CareerSource Florida FWDA/Board/Council Meetings - June 1-3, 2026
 - Letter to Congress - Funding for Workforce Innovation and Opportunity Act (WIOA) Programs
13. Adjournment - Next Executive Meeting - July 17, 2026

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 3

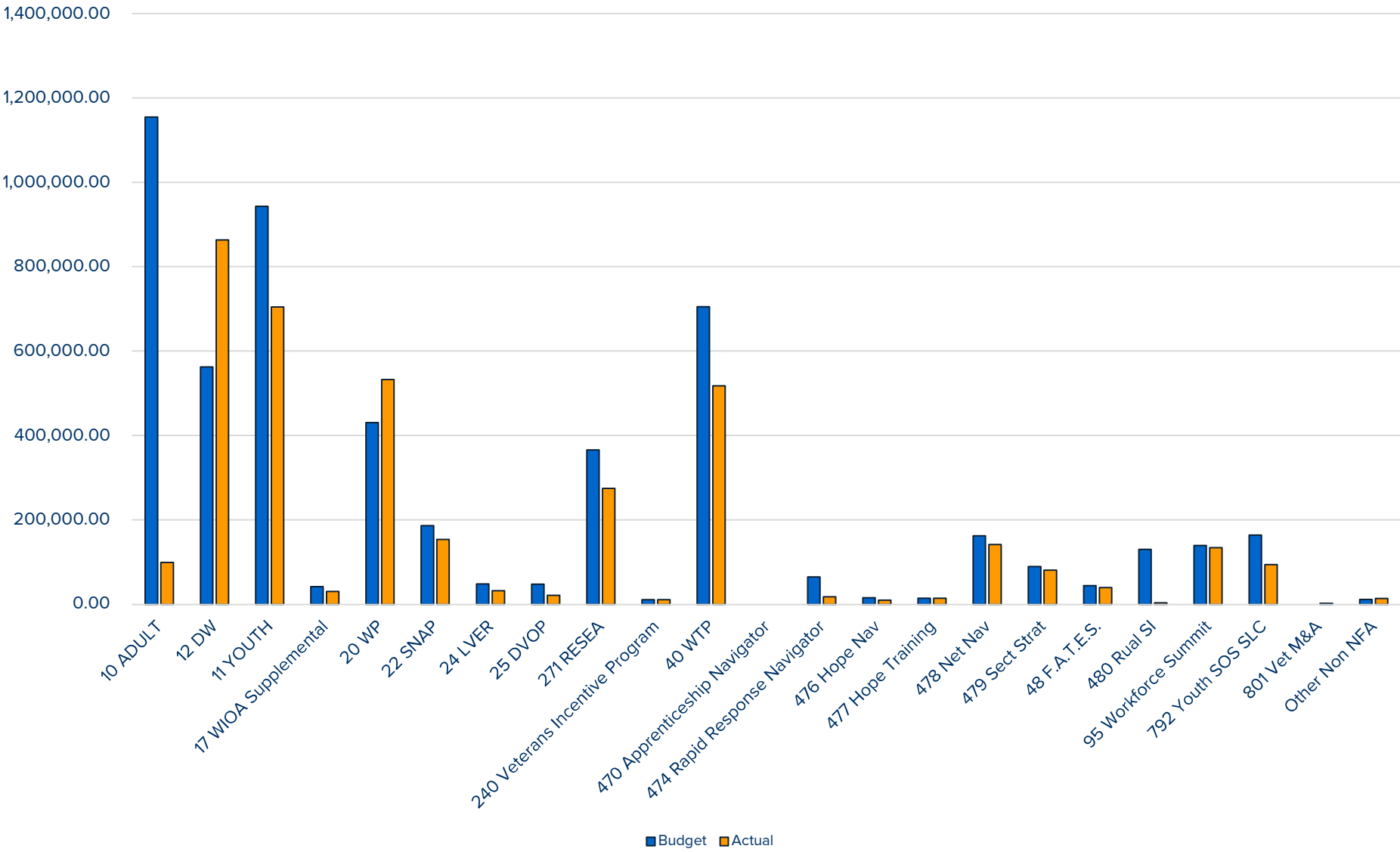
AGENDA ITEM SUMMARY

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 April Financial Reports - PY 2025-2026
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 April Financial Reports
Supporting Material	Monthly Financial Reports, Statement of Financial Position
Board Staff	Lisa Delligatti Chief Financial Officer ldelligatti@careersourcerc.com (866) 482-4473 ext. 430

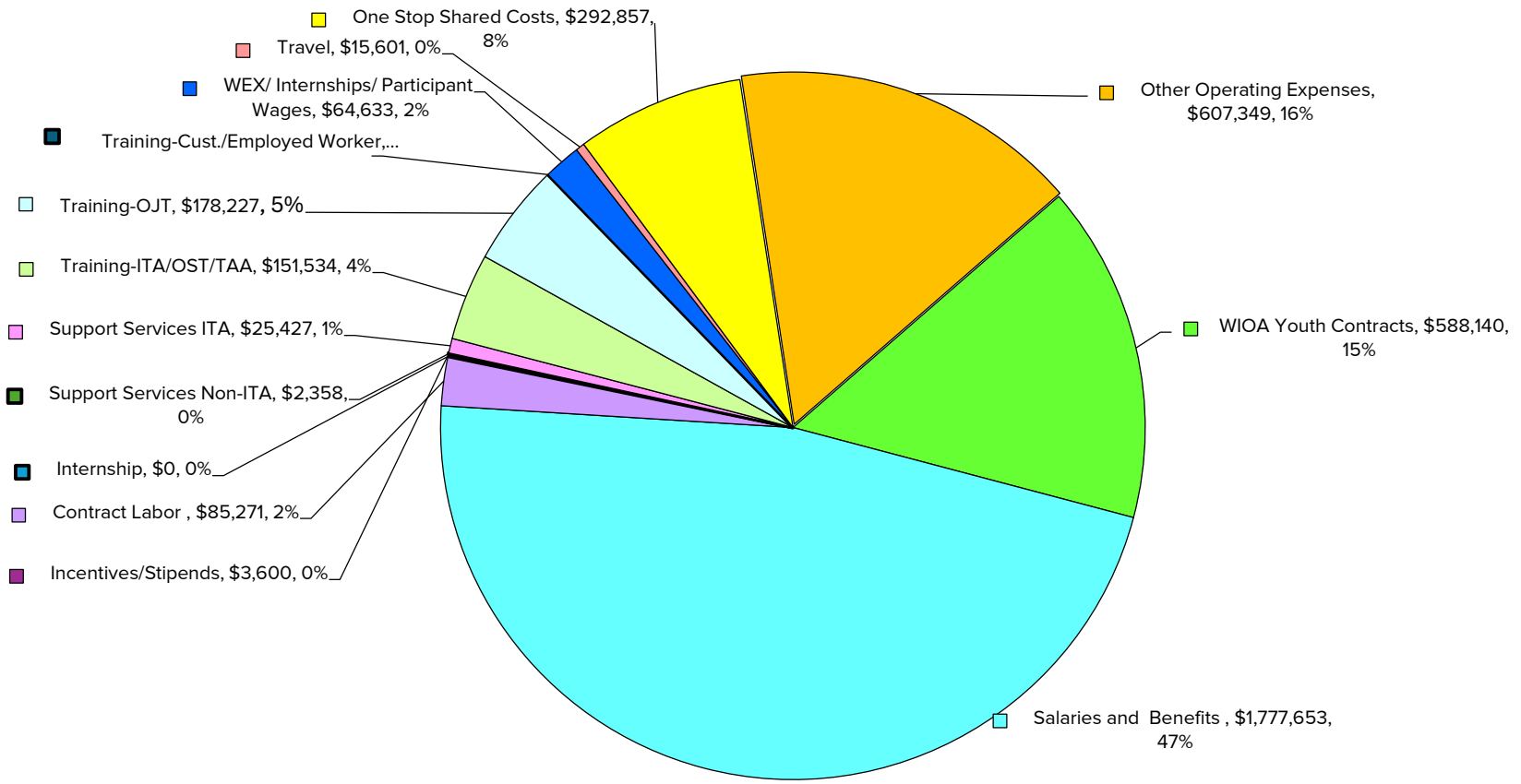
LWDB 20
Summary of Funding and Expenditures
As of April 30, 2026

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		\$ 180,000	\$ -	\$ 333,721	\$ -	\$ 223,990	\$ 115,256	\$ 26,571	\$ 17,075	\$ 155,300	\$ -	\$ 406,623	\$ -	\$ 19,100	\$ -	\$ -
PY 25-26 Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds/Incentives		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 26-27		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 24-25		\$ -	\$ 863,556	\$ 322,276	\$ 28,608	\$ 300,430	\$ 37,812	\$ 6,577	\$ 4,248	\$ 106,698	\$ -	\$ 125,198	\$ -	\$ -	\$ 9,686	\$ 14,620
Total DEO Grant Funding		\$ -	\$ 863,556	\$ 655,997	\$ 28,608	\$ 524,420	\$ 153,068	\$ 33,148	\$ 21,324	\$ 261,998	\$ -	\$ 531,821	\$ -	\$ 19,100	\$ 9,686	\$ 14,620
OTHER NON DEO REVENUES		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 11,095	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL		\$ 180,000	\$ 863,556	\$ 655,997	\$ 28,608	\$ 524,420	\$ 153,068	\$ 33,148	\$ 21,324	\$ 261,998	\$ 11,095	\$ 531,821	\$ -	\$ 19,100	\$ 9,686	\$ 14,620
% of Total Budgeted Funding Received		15.42%	153.32%	69.44%	68.03%	121.67%	81.51%	68.71%	44.40%	71.17%	100.00%	87.24%	0.00%	29.39%	61.18%	0.00%
EXPENDITURES																
Administrative	\$ 0	\$ 34,164	\$ 106,429	\$ 14,804	\$ (19,523)	\$ 89,096	\$ 17,411	\$ 3,482	\$ 2,174	\$ 36,464	\$ 528	\$ 69,137	\$ -	\$ 1,927	\$ 1,053	\$ 1,847
Salaries and Benefits	\$ 301,354	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 127,808	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (429,161)	\$ 163,196	\$ 7,396	\$ 14,804	\$ (19,523)	\$ 33,576	\$ 20,856	\$ 3,482	\$ 2,501	\$ 36,464	\$ 1,764	\$ 69,137	\$ 120	\$ 2,447	\$ 2,602	\$ 5,309
Reclassification	\$ -	\$ (129,032)	\$ 99,032	\$ -	\$ -	\$ 55,520	\$ (3,445)	\$ -	\$ (327)	\$ -	\$ (1,236)	\$ -	\$ (120)	\$ (520)	\$ (1,548)	\$ (3,462)
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ 0	\$ 65,303	\$ 757,127	\$ 689,492	\$ 49,734	\$ 443,536	\$ 135,993	\$ 28,809	\$ 19,087	\$ 238,115	\$ 10,567	\$ 448,752	\$ -	\$ 15,887	\$ 8,633	\$ 12,773
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 588,140	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 214,141	\$ 483,257	\$ 20,269	\$ 17,416	\$ -	\$ 39,969	\$ 79,363	\$ 7,038	\$ 4,093	\$ 172,523	\$ -	\$ 257,294	\$ 435	\$ 12,462	\$ 12,892	\$ 19,094
Contract Labor	\$ -	\$ 30,724	\$ 183	\$ -	\$ -	\$ -	\$ 14,966	\$ -	\$ -	\$ -	\$ -	\$ 35,931	\$ -	\$ -	\$ -	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,600	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ 475	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,665	\$ -	\$ -	\$ -	\$ -
Support Services ITA	\$ -	\$ 20,699	\$ 2,411	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 326	\$ -	\$ -	\$ -	\$ 100
Training-ITA/OST/TAA	\$ -	\$ 115,948	\$ 12,233	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 30	\$ -	\$ -	\$ -	\$ 1,419
Training-OJT	\$ -	\$ 161,978	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,359
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 1,643	\$ 3,244	\$ 426	\$ 588	\$ -	\$ 279	\$ 498	\$ 3,197	\$ 2,023	\$ 1,226	\$ -	\$ 1,863	\$ -	\$ 34	\$ 86	\$ 109
One Stop Shared Costs	\$ 10,752	\$ 80,441	\$ 3,228	\$ 2,840	\$ -	\$ 41,356	\$ 15,245	\$ 15,028	\$ 12,691	\$ 30,977	\$ -	\$ 47,643	\$ 532	\$ 1,881	\$ 2,394	\$ 5,017
Other Operating Expenses	\$ 24,456	\$ 43,872	\$ 3,509	\$ 71,850	\$ -	\$ 125,375	\$ 13,723	\$ 1,510	\$ 1,359	\$ 12,063	\$ 9,698	\$ 59,966	\$ 29	\$ 79	\$ 122	\$ 275
Allocated Program Indirect	\$ (250,992)	\$ 95,444	\$ 4,326	\$ 8,658	\$ -	\$ 19,637	\$ 12,198	\$ 2,037	\$ 1,463	\$ 21,326	\$ 1,032	\$ 40,434	\$ 70	\$ 1,431	\$ 1,522	\$ 3,097
Reclassification	\$ -	\$ (970,780)	\$ 710,544	\$ -	\$ 49,734	\$ 216,920	\$ -	\$ -	\$ (2,542)	\$ -	\$ (162)	\$ -	\$ (1,066)	\$ -	\$ (8,384)	\$ (21,697)
Total Expenditures	\$ 0	\$ 99,467	\$ 863,556	\$ 704,296	\$ 30,211	\$ 532,632	\$ 153,403	\$ 32,291	\$ 21,261	\$ 274,579	\$ 11,095	\$ 517,889	\$ -	\$ 17,814	\$ 9,686	\$ 14,620
Funding Over/(under) expenditures	\$ 0	\$ 80,533	\$ -	\$ (48,299)	\$ (1,604)	\$ (8,212)	\$ (335)	\$ 857	\$ 62	\$ (12,580)	\$ -	\$ 13,932	\$ -	\$ 1,287	\$ -	\$ -
YTD % of Budgeted Funds Expended		8.52%	153.32%	74.56%	71.84%	123.58%	81.68%	66.93%	44.27%	74.59%	100.00%	84.95%	0.00%	27.41%	61.18%	0.00%

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 4/30/2026

Assets

Current assets

Cash - Accounts Payable	4,753.50
Cash - Payroll	31,405.19
Cash - Business Checking W/Int.	382,455.49
Accounts Receivable Customers	111.03
Accounts Receivable - Other	2,446.67
Prepaid Expenses	39,473.62
Deposits	837.00
Due TO/ Due FROM	2,396.90

Total Current assets 463,879.40

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 547,859.88

Liabilities & Net Assets

Current Liabilities

Accounts Payable	23,215.11
Payroll Accounts Payable	424.70
Accrued Expenses	69,427.95
Federal Withholding Tax	(0.01)
FICA Payable	0.60
SUTA Payable	34.44
Principal Insurance	286.94
Health Insurance Payable	1,990.35
AFLAC Payable	1,029.49
Legal Shield	97.22
Workers Comp Payable	5,944.22
Accrued Leave	80,222.32
Sick Leave Liability	44,265.49
Refundable Advances	1,935.77
Deferred Revenue	617.50

Total Current Liabilities 229,492.09

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	(714,214.41)
Total Net Assets	318,367.79

Total Liabilities & Net Assets 547,859.88

AGENDA ITEM SUMMARY

Title	Review and Approve Renewable Vendor Contract for PY 2026-2027
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Board Policy/Board Responsibility
Action Requested	Review and Approve Renewal of Contract with LippesMathias, LLP
Background	<p>CareerSource Research Coast enters into multiple-year contracts with several vendors.</p> <p>Each year of the Vendor Contract term, CSRC staff will report to the Board of Directors on the performance and intent to renew the contract(s) or seek new vendor(s)/provider(s).</p>
Staff Recommendations	Approve contract renewal for Program Year 2026-2027 for LippesMathias, LLP, General Business and Employment, General Counsel
Supporting Material	Engagement Letter - LippesMathias, LLP, General Business and Employment, General Counsel
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

May 20, 2026

VIA EMAIL bbauer@careersourcerc.com

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

RE: Engagement of Lippes Mathias LLP / General Business/Employment and General Counsel

Dear Mr. Bauer:

Thank you for continuing to retain Lippes Mathias LLP (the "Firm" or "Lippes") as your legal counsel for the upcoming Program Year, July 1, 2026 through June 30, 2027. This letter will confirm the terms of the Firm's representation during that Program Year. In addition, this letter will explain our fees and billing procedures, as well as what Workforce Board of the Treasure Coast d/b/a CareerSource Research Coast (the "Client" or "CareerSource"), can expect from us and what we expect from the Client.

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

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

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

REASONABLENESS OF FEE

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

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

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

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

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

Very truly yours,

LIPPES MATHIAS LLP



Bari L. Goldstein, Esq.

READ AND AGREED TO THIS _____
day of _____, 2026

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

AGENDA ITEM SUMMARY

Title	Review and Approve Letter of Intent for WIOA Youth Service Subrecipient Contact - PY 2026-2027
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Workforce Innovation & Opportunity Act (WIOA)
Action Requested	Review and Approve the Letter of Intent for WIOA Youth Service Subrecipient Contact - PY2 026-2027
Background	<p>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.</p> <p>CareerSource Research Coast, as Administrative and Fiscal Entity for the Local Workforce Development Board 20 (LWDB 20), hereby states its intention to enter into a sub-reipient agreement with Eckerd Connects, (the "Contractor").</p> <p>The purpose of the Letter of Intent to Contract is to enable the Contractor's staff to review and revise the Statement of Work and to negotiate the agreement. However, this document does not constitute the final, detailed agreement, which shall be approved and executed by both organizations by September 30, 2026.</p>
Staff Recommendations	Review and Approve the Letter of Intent for WIOA Youth Service Sub-recipient Contact - PY2026-2027
Supporting Material	Letter of Intent to Contract
Board Staff	<p>Tracey McMorris Vice President of Operations/COO tmcmorris@careersourcerc.com 1-866-482-4473 ext. 528</p>

June 2, 2026

Ms. Nicole Stroebel
CFO
Eckerd Connects
100 N. Starcrest Drive
Clearwater, Florida 33765

Dear Ms. Stroebel:

CareerSource Research Coast, as Administrative and Fiscal Entity for the Local Workforce Development Board 20 (LWDB 20), hereby states its intention to enter into a sub-recipient agreement with Eckerd Connects, (the "Contractor").

Proposed Program

Eckerd Connects will provide WIOA Youth Program services and activities for youth participants in Local Workforce Development Area 20 (LWDA 20), Indian River, Martin and St. Lucie Counties; CareerSource Research Coast.

This Letter of Intent shall become effective upon execution by authorized representatives of both parties. The sub-recipient agreement period shall run from July 1, 2026, through June 30, 2027. This is a performance-based cost reimbursement service agreement with a total proposed amount not to exceed seven hundred fifty thousand dollars (\$750,000) A minimum of \$189,926.00 must be expended on work experience activities for the program's youth participants.

The purpose of the Letter of Intent to Contract is to enable the Contractor's staff to review and revise the Statement of Work and to negotiate the agreement. However, this document does not constitute the final, detailed agreement, which shall be approved and executed by both organizations by September 30, 2026.

APPROVED AND ACCEPTED ON June 4, 2026

By:   Digitally signed by Brian K. Bauer
Date: 2026.06.04 16:54:46 -04'00'

Brian K. Bauer, President/CEO
CareerSource Research Coast

APPROVED AND ACCEPTED ON Jun 3, 2026

By:  _____
Nicole Stroebel, CFO
Eckerd Connects

AGENDA ITEM SUMMARY

Title	Individual Training Account (ITA) Waiver Request - PY2026-2027
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Florida Statutes (F.S.) 445.003(3)(a)1, CareerSource Florida Administrative Policy 74 - Individual Training Account Expenditure Requirements and Waiver Request Requirements
Action Requested	Review and Approve 40% ITA Waiver Request for PY2026-2027
Background	<p>Florida requires local workforce development boards to spend at least 50 percent of their Workforce Innovation & Opportunity Act (WIOA) Adult and Dislocated Worker funds on Individual Training Accounts (ITAs), unless a waiver is approved by the state board.</p> <p>ITA expenditures include tuition, books, fees, and other training services authorized under WIOA. CSRC is seeking board approval to submit a request for a 40% ITA waiver for Program Year 2026-2027.</p>
Staff Recommendations	Review and Approve 40% ITA Waiver Request for PY2026-2027
Supporting Material	PY26-27 ITA Waiver Request Memo and Standard Waiver Option
Board Staff	Tracey McMorris Vice President of Operations/COO tcmorris@careesourcerc.com (866-482-4473) ext. 528

May 28, 2026

The Workforce Development Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast's (CSRC), is formally submitting its Individual Training Accounts (ITA) Waiver Request of **40%** for the 2026-2027 program year.

CareerSource Research Coast (CSRC) remains committed to meeting workforce training needs through a comprehensive and flexible training strategy that includes Individual Training Accounts (ITAs), On-the-Job Training (OJT), Registered Apprenticeship Programs (RAPs), co-enrollment with partner-funded training programs, supportive services, and training-related case management. The requested waiver will allow CSRC to continue strategically utilizing available WIOA Adult and Dislocated Worker formula funds to support training investments while maintaining the flexibility necessary to respond to evolving participant and employer needs within its LWDA.

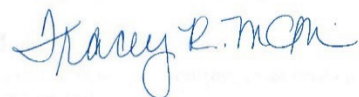
For the upcoming program year, CSRC anticipates continued investment across allowable ITA expenditure categories, with an emphasis on work-based training opportunities that align with regional labor market demand and support participants in obtaining employment in in-demand occupations. CSRC will continue expanding opportunities through OJT and apprenticeship partnerships, while also leveraging co-enrollment strategies and other funding sources to maximize participant access to training and supportive services.

CSRC will continue implementing local strategies designed to increase training participation and access, including supportive services for participants engaged in training activities, individualized career planning, expand outreach to underserved populations, employer engagement initiatives, and coordination with education and workforce partners. Staff will continue coordinating across programmatic, business services, and fiscal teams to ensure participants are connected to appropriate training opportunities and that training-related expenditures are accurately tracked and aligned with local workforce priorities.

The requested 40% waiver will allow CSRC to continue implementing a balanced and responsive strategy that supports local workforce needs, expands access to training opportunities, and maximizes the effectiveness of available WIOA resources.

Thank you for your consideration of this request. If you have any questions regarding this request or the supporting data, please do not hesitate to contact me at (866) 482-4473 x528 or via email at tmcmorris@careersourcerc.com.

Sincerely,



Tracey McMorris
Vice President of Operations/COO

Board of Directors/ Chief Local Elected Officials Approval

By the signatures below, we endorse and affirm our approval of the Workforce Development Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast (CSRC), which serves the local workforce development area (LWDA20), request for an ITA waiver of 40%.

Jim Brann, Chairperson
Workforce Development Board of the Treasure Coast, Inc.
d/b/a CareerSource Research Coast

Date

Jamie Fowler, St. Lucie County Commissioner
Treasure Coast Workforce Consortium

Date

Stacey Heatherington, Martin County Commissioner
Treasure Coast Workforce Consortium

Date

Laura Moss, Indian River County Commissioner
Treasure Coast Workforce Consortium

Date

ATTACHMENT B

STANDARD WAIVER OPTION

CareerSource Research Coast _____

LWDB 20

PY 2024 (July 1, 2024 – June 30, 2025)

a. Combined Adult/DW Expenses PY 2024	\$1,542,633
b. ITA Expenditures PY 2024 (as reported in SERA) All ITA categories reflected in the 2025 ITA Crosswalk	\$692,276
c. ITA Expenditures as Percentage of Adult/DW Expenses PY 2024 =a/c should be c/a	44.87%
d. ITA Expenditures PY 2024 excluding Training Program and Case Management (and related overhead) expenses	\$554,681
e. Expenditures recorded at d. as Percentage of ITA expenditures PY 2024 =b/d should be d/b	80.12%
f. Number of participants enrolled in the activities listed in the 2025 ITA Crosswalk, including Direct Training Services, Work-based Activities during PY 2024	

PY 2025 (July 1, 2025– June 30, 2026) based on current expenditures, obligations, encumbrances, and projections as of 5/31/26

a. Combined Adult/DW Expenses PY 2025	\$824,152
b. ITA Expenditures PY 2025(as reported in SERA) All ITA categories reflected in the 2025 ITA Crosswalk	\$387,324
c. ITA Expenditures as Percentage of Adult/DW Expenses PY 2025 =a/c should be c/a	46.99%
d. ITA Expenditures PY 2025 excluding Training Program and Case Management (and related overhead) expenses	\$313,270
e. Expenditures recorded at d. as Percentage of ITA expenditures PY 2025 should be d/b	\$80.8%
f. Number of participants enrolled in the activities listed in the 2025 ITA Crosswalk, including Direct Training Services, Work-based Activities during PY 2025	
Requested ITA expenditure waiver (may not be below 30%)	40%

Detailed projections for how the requested waiver will meet local training needs for the next fiscal year (July 1 – June 30)

Projected expenditures for the next fiscal year in all applicable ITA subcategories:

ITA Occupational Skills Training (OST)	\$247,473
Supportive Services for ITA OST	\$53,798
Non-ITA OST	\$
Other Allowable Training Expenses	\$
Supportive Services for Non-ITA training	\$
Work-Based Learning	\$371,209
Other Allowable Training Activities	\$
Co-Enrollment in Other Training Services Programs	\$
Training Program Management and Case Management staff time directly related to time use in developing, implementing or coordinating authorized training programs for participants and directly related to case management and job placement services for participants in training (not clients seeking training) Limited to salaries and benefits of these staff activities. Should include overhead associated with the case management time.	\$104,115

AGENDA ITEM SUMMARY

Title	Slate of Officers for 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 LWDB's/Board By-Laws
Action Requested	Review and Approve Nomination for Slate of Officers
Background	<p>The Board's By-Laws state that the Chairperson, Vice Chairperson, and Treasurer shall be appointed annually by the Board and shall serve a one (1) year term commencing July 1. The Chairperson's and the Vice Chairperson's terms shall be limited to two (2) consecutive one (1) year terms, and the Treasurer shall be limited to four (4) consecutive one (1) year terms. There are no limitations on the number of terms not in sequence or in different offices.</p> <p>Slate of Officers:</p> <ul style="list-style-type: none"> • William Armstead - Chair • Kelly Johnson - Vice Chair • Christi Shields - Treasurer
Staff Recommendations	Discuss and Approve Nomination for Slate of Officers for PY 2026-2027
Supporting Material	By-Laws of the Workforce Board of the Treasure Coast, LWDB20
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

AGENDA ITEM SUMMARY

Title	Consent Agenda
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law Action	Board By-Laws
Requested Background	<p>Approve Consent Agenda, as presented</p> <p>Consent Agenda</p> <ul style="list-style-type: none"> a. Review and Approve Welfare Transition Program (WT) - Incentive Payments Policy Revisions b. Review and Approve Workforce Innovation and Opportunity Act (WIOA) Youth - Supportive Services Policy Revisions c. Review and Approve Workforce Innovation and Opportunity Act (WIOA) - Individual Training Account Policy Revisions
Staff Recommendation	Review and Approve Consent Agenda Items, as presented
Supporting Material	Draft Policies
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

AGENDA ITEM SUMMARY

Title	Revisions to the Welfare Transition Program (WTP) Incentive Payments Policy
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Personal Responsibility and Work Opportunity Reconciliation Act, Federal Regulations (45CFR 263.11(b), and Florida Statute 414.085
Action Requested	Review and Approve Revisions to CSRC's Welfare Transition Program Incentive Payments Policy
Background	<p>The Temporary Assistance for Needy Families (TANF) Program is designed to assist eligible individuals in achieving economic self-sufficiency through participation in work, education, training, and related activities that support long-term employment outcomes. As part of program delivery, incentive payments may be used to encourage engagement and recognize progress toward established goals.</p> <p>The proposed revision to the WTP Incentive Policy updates and clarifies CSRC's approach to incentive payments provided to WTP participants. While incentive payments will continue to be subject to available funding, the revised policy places greater emphasis on encouraging participation in employment and training activities that strengthen employability, support progress toward established goals, and advance participant self-sufficiency.</p>
Staff Recommendations	Approve the revisions to the Welfare Transition Program Up-Front Diversion Policy
Supporting Material	WTP – Incentives Payments Policy
Board Staff	<p>Tracey McMorris Vice President of Operations/COO tmcmorris@careersourcerc.com (866) 482-4473 ext. 528</p>



WELFARE TRANSITION PROGRAM INCENTIVE PAYMENTS -POLICY

ORIGINAL APPROVAL DATE: 8/10/2011

REVISION DATE: 02/28/20245/27/2026

BOARD APPROVAL DATE: 02/28/20246/24/2026

PURPOSE

The purpose of this policy is to establish a uniform standard for CareerSource Research Coast’s (CSRC) use of Incentive Payments for Welfare Transition (WT) Program participants.

REFERENCES

Personal Responsibility and Work Opportunity Reconciliation Act, Federal Regulations (45CFR 263.11(b), and Florida Statute 414.085. WTP – Incentive Payments Procedures:-

BACKGROUND

Florida Statutes allow Local Workforce Development Boards (LWDBs) to provide incentives to WT participants to complete assigned activities. In addition, the LWDBs may determine the value of the incentive payments and create policies related to their use.

POLICY:

It is the policy of CSRC to provide incentive payments to WT Program participants ~~to encourage the completion of activities leading to self-sufficiency, as detailed in the table below, as a tool to promote participation in employment and training activities, recognize progress toward established goals, and support achievement of self-sufficiency. Incentive payment amounts are subject to available funding and established program priorities. Incentive payment amounts are based on the availability of funding.~~

INCENTIVE PAYMENT ELIGIBILITY REQUIREMENTS:

~~All participants must either:~~

- ~~• Participants must R~~received cash assistance benefits in the month the incentive is earned ~~or~~
- ~~• Participants’ C~~cash assistance benefits closed within the previous three months from the date of request due to earnings generated from employment.
 - ~~— If the incentive request is for quarterly employment retention, the Temporary Cash Assistance case must have initially closed due to earnings generated from employment.~~

WT PROGRAM INCENTIVE PAYMENTS AND AMOUNTS*

~~CSRC provides the following incentives to WT participants as determined allowable and upon meeting the requirements listed for each:~~

<u>Incentive Reason</u>	<u>Amount</u>
<u>Attendance at scheduled initial appointment with a WT Program Career Planner</u>	<u>\$25.00</u>
<u>Obtainment of GED or High School Diploma</u>	<u>\$100.00</u>
<u>College Degree, Applied Technical Diploma, Nationally Recognized Credential, Industry Certification or State License (Participants will not receive an incentive if they do not complete the related credential for the program of study)</u>	<u>\$100.00</u>
<u>Unsubsidized Job Placement Full-time (30 hours or more), after verification of employment and the receipt of the first paystub reflecting a full pay period.</u>	<u>\$200.00</u>
<u>Unsubsidized Job Placement Full-time (29 hours or less), after verification of employment and the receipt of the first paystub reflecting a full pay period.</u>	<u>\$100.00</u>
<u>Completion of participation hours for the month</u>	<u>\$75.00</u>
<u>Completion of a resume approved by a CSRC Workshop Instructor and completion of three approved job readiness workshops</u>	<u>\$75.00</u>
<u>Completion of three assessments in the Skills, Interests, and Proficiency Assessments workshop</u>	<u>\$75.00</u>
<u>Completion of each 75-hour Office Administration course</u>	<u>\$175.00</u>
<u>Completion of two consecutive weeks of vocational training</u>	<u>\$75.00</u>
<u>Completion of a WIOA intake and assessment with a CSRC (WIOA) Career Planner</u>	<u>\$25.00</u>

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.



WELFARE TRANSITION PROGRAM INCENTIVE PAYMENTS -POLICY

ORIGINAL APPROVAL DATE: 8/10/2011

REVISION DATE: 02/28/20245/27/2026

BOARD APPROVAL DATE: 02/28/20246/24/2026

<u>Completion of the Florida Ready to Work program, attainment of the Florida Soft Skills Credential, and attainment of the Florida Ready to Work Credential</u>	<u>\$150.00</u>
<u>Retention of employment after case closure by DCF for earned income (quarterly up to 4 quarters), only when the Temporary Cash Assistance case initially closed due to earnings generated from employment.</u>	<u>\$50.00</u>
<u>Completion of weekly hours at Community Service/Work Experience Site</u>	<u>\$25.00</u>
<u>Attendance at Job Fair</u>	<u>\$25.00</u>

The amount of incentive payments are subject to change based on the amount of Welfare Transition Program funding available and awarded to CSRC each program year.

- ~~● Attendance at a scheduled, in-person, initial appointment with a WT Program Career Planner - \$25~~
- ~~● Obtainment of GED or high school diploma - \$100~~
- ~~● College Degree, Applied Technical Diploma, Nationally Recognized Credential, Industry Certification or State License - \$100 - Participants may not receive an incentive if they do not complete the related credential for the program of study:

 - ~~● Unsubsidized Job Placement

 - ~~○ Full time (30 hours or more) employment - \$200~~
 - ~~○ Part time (29 hours or less) employment - \$100~~~~~~
- ~~● Employment incentives will only be requested after verification of employment and the receipt of the first full paystub.~~
- ~~● Completion of four consecutive weeks of participation (can be ongoing) - \$75

 - ~~● Completion of a resume approved by a CSRC Workshop Instructor and completion of three approved job readiness workshops - \$75~~
 - ~~● Completion of three assessments in the Skills, Interests, and Proficiency Assessments workshop - \$75~~
 - ~~● Completion of each 75-hour Office Administration course - \$175~~
 - ~~● Completion of two consecutive weeks of vocational training (can be ongoing) - \$75~~
 - ~~● Completion of a WIOA intake and assessment with a CSRC (WIOA) Career Planner - \$25~~
 - ~~● Completion of the Florida Ready to Work program, attainment of the Florida Soft Skills Credential, and attainment of the Florida Ready to Work Credential - \$150~~
 - ~~● Retention of employment after case closure by DCF for earned income-

 - ~~○ 1st quarter following case closure \$50~~
 - ~~○ 2nd quarter following case closure \$50~~
 - ~~○ 3rd quarter following case closure \$50~~
 - ~~○ 4th quarter following case closure \$50~~~~~~
- ~~* The amount of incentive payments are subject to change based on the amount of Welfare Transition Program funding available and awarded to CSRC each program year.~~

Refer to the Following Documents:

WTP - Incentive Procedure

WTP - Issuance of Transportation and Incentive Payments Policy

WTP - Issuance of Transportation Assistance and Incentive Payments Procedure



WELFARE TRANSITION PROGRAM INCENTIVE PAYMENTS POLICY

ORIGINAL APPROVAL DATE: 8/10/2011

REVISION DATE: 5/27/2026

BOARD APPROVAL DATE: 6/24/2026

PURPOSE

The purpose of this policy is to establish a uniform standard for CareerSource Research Coast’s (CSRC) use of Incentive Payments for Welfare Transition (WT) Program participants.

REFERENCES

Personal Responsibility and Work Opportunity Reconciliation Act, Federal Regulations (45CFR 263.11(b), and Florida Statute 414.085. [WTP – Incentive Payments Procedures](#)

BACKGROUND

Florida Statutes allow Local Workforce Development Boards (LWDBs) to provide incentives to WT participants to complete assigned activities. In addition, the LWDBs may determine the value of the incentive payments and create policies related to their use.

POLICY:

It is the policy of CSRC to provide incentive payments to WT Program participants, as detailed in the table below, as a tool to promote participation in employment and training activities, recognize progress toward established goals, and support achievement of self-sufficiency. Incentive payment amounts are subject to available funding and established program priorities

INCENTIVE PAYMENT ELIGIBILITY REQUIREMENTS:

- Participants must receive cash assistance benefits in the month the incentive is earned or
- Participants’ cash assistance benefits closed within the previous three months from the date of request due to earnings generated from employment.

Incentive Reason	Amount
Attendance at scheduled initial appointment with a WT Program Career Planner	\$25.00
Obtainment of GED or High School Diploma	\$100.00
College Degree, Applied Technical Diploma, Nationally Recognized Credential, Industry Certification or State License (Participants will not receive an incentive if they do not complete the related credential for the program of study)	\$100.00
Unsubsidized Job Placement Full-time (30 hours or more), after verification of employment and the receipt of the first paystub reflecting a full pay period.	\$200.00
Unsubsidized Job Placement Full-time (29 hours or less), after verification of employment and the receipt of the first paystub reflecting a full pay period.	\$100.00
Completion of participation hours for the month	\$75.00
Completion of a resume approved by a CSRC Workshop Instructor and completion of three approved job readiness workshops	\$75.00
Completion of three assessments in the Skills, Interests, and Proficiency Assessments workshop	\$75.00
Completion of each 75-hour Office Administration course	\$175.00
Completion of two consecutive weeks of vocational training	\$75.00
Completion of a WIOA intake and assessment with a CSRC (WIOA) Career Planner	\$25.00
Completion of the Florida Ready to Work program, attainment of the Florida Soft Skills Credential, and attainment of the Florida Ready to Work Credential	\$150.00
Retention of employment after case closure by DCF for earned income (quarterly up to 4 quarters), only when the Temporary Cash Assistance case initially closed due to earnings generated from employment.	\$50.00
Completion of weekly hours at Community Service/Work Experience Site	\$25.00
Attendance at Job Fair	\$25.00

AGENDA ITEM SUMMARY

Title	Review and Approve WIOA Workforce Innovation Opportunity Act (Act) - Youth Program Supportive Services Policy Revisions
Strategic Plans/Goals	Operational Intelligence
Policy/Plan /Law	Section 129 of the Workforce Innovation & Opportunity Act (WIOA); CareerSource Florida Administrative Policy Number 109; TEGL 10-16, Change 3.
Action Requested	Review and Approve Revisions to Workforce Innovation Opportunity Act (Act) - Youth Program's Supportive Services Policy
Background	<p>Supportive services, one of the fourteen program elements for the WIOA Youth program, are services that enable an individual to participate in WIOA activities. These supportive services include but are not limited to assistance with transportation, childcare, housing, health care, educational testing, work-related attire, and work-related tools.</p> <p>Staff has revised the policy to include a structured approval process for requests that fall outside of the limits or frequency outlined in the policy. This change aligns the WIOA Youth policy with the existing WIOA Adult and Dislocated Worker approach, requiring VP/COO approval for exceptions.</p>
Staff Recommendations	Approve the Revisions to the WIOA Youth Program Supportive Services Policy
Supporting Material	WIOA Youth Program Supportive Services Policy
Board Staff	<p>Tracey McMorris Vice President of Operations/COO tmcmorris@careersourcerc.com (866) 482-4473 ext. 528</p>



PURPOSE

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

REFERENCES

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

BACKGROUND

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

LOCAL POLICY

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

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

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



Due to limited WIOA Youth program funding, CSRC does not regularly authorize supportive service payments for housing expenses, childcare/dependent care, legal fees, fines, late fees, court costs, or any item not listed in the chart below. Limits are based on the participant’s documented need, suitability, and funding availability. The table below reflects the supportive services regularly needed by WIOA Youth participants. Requests for support services not listed may be submitted to the Youth Program Manager; however, the VP/COO will have the final approval of supportive services not listed, and requests that exceed the “Quantity Limitation,” or maximum amount listed below. However, requests for support services not listed may be approved by the WIOA Youth Program Manager.

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

Reference Documents:

[WIOA Youth - Supportive Services Procedure](#)



PURPOSE

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

BACKGROUND

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

LOCAL POLICY

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

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

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

Due to limited WIOA Youth program funding, CSRC does not regularly authorize supportive service payments for housing expenses, childcare/dependent care, legal fees, fines, late fees, court costs, or any item not listed in the chart below. Limits are based on the participant's documented need, suitability, and funding availability. The table below reflects the supportive services regularly needed by WIOA Youth participants. Requests for support services not listed may be submitted to the Youth Program Manager; however, the VP/COO will have the final approval of supportive services not listed, and requests that exceed the "Quantity Limitation," or maximum amount listed below.



Support Service	Quantity Limitation
Background Screening	Twice Per Program Year
Bus Passes	Once Per Month Maximum
Driver's License, Permit, State ID	Once Per Program Year (Each)
Educational Testing, Licensing Fees, Required Textbooks	\$500 Maximum Per Program Year
Gas Cards/Uber Cards	Bi-weekly
Interview Attire	2 Tops and 2 Bottoms Per Program Year
Physicals/Drug Screening	\$500 Maximum Per Program Year
Required Accommodations for Youth with Disabilities	No Quantity Limitation. Based on Documentation of Need and Manager approval.
Safety Steel Toe Boots	One Pair Per Program Year
Shoes	One Pair Per Program Year
Tools	Once Per Program Year
Uniforms	2 Tops and 2 Bottoms Per Program Year (**unless participant provides documentation from the training program/potential employer with the # of uniform items required)

AGENDA ITEM SUMMARY

Title	WIOA - Individual Training Account Policy Revisions
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Workforce Innovation and Opportunity Act of 2014 (WIOA), Sec. 134(c)(3) (G)(ii)
Action Requested	Review and Approve WIOA - Individual Training Account Policy Revisions
Background	<p>The Workforce Innovation and Opportunity Act (WIOA) requires that individuals be provided an Individual Training Account (ITA) to pay for tuition, books, and fees related to occupational skills training accessed through an approved training provider. CareerSource Florida requires that local boards establish policies related to the value of the ITA, cancellation, transferability, and limits that apply to these accounts.</p> <p>Staff have revised the policy to increase the maximum ITA investments.</p>
Staff Recommendations	Review and Approve WIOA - Individual Training Account Policy Revisions
Supporting Material	WIOA - Individual Training Account Policy Revisions
Board Staff	Tracey McMorris Vice President of Operations tmcmorris@careesourcerc.com (866)-482-4473 ext. 528

PURPOSE

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

REFERENCE

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

BACKGROUND

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

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

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

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

POLICY

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

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

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

TIER	ENTRY WAGE FOR LWDA	MAXIMUM INVESTMENT	ITA
Tier 1	\$15.19* to \$18.67 per hour	Up to \$ 7,500 10,000**	
Tier 2	\$18.68 per hour	Up to \$ 10,000 15,000**	
Tier 3	Related Instruction for Registered Apprenticeship	**See Below	

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

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

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

1. The career seeker must not have received an ITA in the past 24 months.
2. The career seeker must be a resident of the CSRC service delivery or Palm Beach-Treasure Coast Regional Planning Area to receive an ITA. An exception may be made to award an ITA to eligible and suitable career seekers who are residents of other CareerSource LWDA's when each of the following conditions are met:
 - a. The purpose of the ITA is for specialized sector training as specified by WIOA funding awarded through grants and/or specialized projects.
 - b. A partnership with the Local Workforce Development Board governing the LWDA in which the career seeker resides has been established and documented.
3. The career seeker has been determined through formal assessment(s), interviews, and career planning, to be an appropriate match and possess the aptitude to complete the selected training program, obtain the appropriate certification/credential, and be eligible for hire in training related employment.
4. As part of the suitability determination process, career seekers must demonstrate the ability to self-sustain financially for the length of the training until employment is gained and be able to cover the training amount above CSRC funds.
5. The selected training program and training provider is listed on the ETPL and is within the LWDA's commuting area.
6. The career seeker must select an eligible training program offered by an eligible training provider, which upon completion of training, leads to an industry-recognized certification, credential, or degree.
7. On an annual basis, or in the case of scholarships, as they become available, the career seeker must apply for 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 with Florida Relay Service at 711.

other training assistance (for example: Pell Grant, scholarships, and employer-sponsored training) to help assist with the cost of training and training related support. Any scholarships or grants received will be applied toward the total allowable tuition, books, and fees prior to determining the ITA amount.

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

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

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

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

ITAs are not transferable.

PURPOSE

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

REFERENCE

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

BACKGROUND

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

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ITAs are not transferable.

AGENDA ITEM SUMMARY

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



DECLARATION OF AUTHORITY
THE WORKFORCE DEVELOPMENT
BOARD OF THE TREASURE COAST, INC.

Board Member's Name: Michael Maine

Board Member's Title: Superintendent

Board Member's Organization: Martin County School District

Board Seat (select all that apply):

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

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

Name of Designee: Daniel Moore

Title of Designee: Executive Director of Curriculum and Instruction

Mailing Address of Designee: 1939 SE Federal Highway Stuart, Florida 34994

Designee Telephone Number: 772-219-1200 Fax Number: _____

Designee Email: moored@martinschools.org

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

Board Member Signature: Signed by:
Michael Maine
846428523D8F4B2... _____ Date: 5/19/2026 | 2:58 PM EDT

Designee Signature: DocuSigned by:
Daniel Moore
B58D46875AD2434... _____ Date: 5/13/2026 | 12:39 PM PDT

AGENDA ITEM SUMMARY

Title	Review and Approve Independent Monitoring - Award of Contract
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Board Policy/Board Responsibility
Action Requested	Review and Approve Recommendation of Rating Team for independent Monitoring
Background	<p>The current Independent Monitoring contract with Taylor, Hall, Miller & Parker (THMP) expires on 6/30/2026. Contracts are awarded for a period of five (5) years, renewable annually, dependent upon performance.</p> <p>CareerSource Research Coast released a formal Request for Proposal for an Employer of Record with a submission deadline of June 3, 2026, for the period of July 1, 2026, through June 30, 2031.</p> <p>CSRC received two (1) proposals that passed technical review. The Review Team reviewed and discussed their evaluations of all proposals, combined the individual scores, and arrived at a composite technical score for each proposal. A rating team consisting of the Chief Financial Officer and two administrative staff members rated the proposal.</p> <p>The RFP/RFQ Rating Team Compilation is being proposed to the Executive Committee for review and approval. Based upon the cumulative rating score of the team, Taylor, Hall, Miller & Parker (THMP) has been determined to be the most advantageous contract award for CSRC.</p>
Staff Recommendations	Review and Approve Award of Contract for Independent Monitoring
Supporting Material	RFP/RFQ Rating Team Compilation
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>



careersourcerc.com

Memorandum

To: Brian K. Bauer, President/CEO

From: Lisa Delligatti, Chief Financial Officer

RE: RFQ #26-001-MTR

June 10, 2026

The RFQ #26-001-MTR was issued May 6, 2026 and we received one proposal from Taylor Hall Miller & Parker. This proposal passed the technical review and was rated by CSRC staff. We have utilized this independent monitoring firm for many years and they have performed their monitoring engagements satisfactorily by completing all work timely, making themselves available for consultation and when necessary, responding promptly when needed. The firm has kept costs in line with the agreed upon amounts as contracted and the current proposed costs are in line with historical costs for this service. As such, we are recommending to contract with Taylor Hall Miller & Parker for July 1, 2026, through June 30, 2027 for independent monitoring, with the option to renew annually for a total of 5 years.



RFP/RFQ RATING TEAM COMPILATION - PROPOSER

RFP/RFQ Title: Independent Monitoring RFP/RFQ Number: 26-001-MTR

Proposer: Taylor Hall Miller Parker

Rating Team Captain: Lisa Delligatti

Rating Team Members: 1. Rachel Pamer 2. Lisa Delligatti
 3. Heidi Whybrew 4. _____
 5. _____

Recommended: Yes No

Rated Elements	Rater's Scores					Total	Average	Comments
	1	2	3	4	5			
1 (20 Points Max)	20	20	20			60	0.00	
2 (20 Points Max)	20	20	20			60	0.00	
3 (20 Points Max)	20	20	20			60	0.00	
4 (20 Points Max)	20	20	20			60	0.00	
5 (20 Points Max)	20	20	20			60	0.00	
6 (Points Max)						0	0.00	
TOTAL POINTS (100 PTS MAX)						300		

As rating team captain, I Lisa Delligatti attest that this recommendation and these scores were submitted by Rating Team members.

Rating Team Captain Signature: Lisa Delligatti Digitally signed by Lisa Delligatti Date: 2026.06.10 09:04:41 -04'00' Date: 6/10/26

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 Services at 711. RFP RFQ Rating Team Compilation (Proposer) - April 2020

Agenda Item 11

AGENDA ITEM SUMMARY

Title	LWDB 20 Primary Indicators of Performance for Program Year (PY) 2025-2026 3rd Quarter
Strategic Plans/Goals	Clear, Credible, and Trustworthy Commitments and Projects
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA) Title I Programs and Title III Wagner-Peyser (WP) Act; Training and Employment Guidance Letter No. 09-20
Action Requested	None - Information Only
Background	The State of Florida must negotiate and agree upon performance levels for WIOA and WP programs funded by the United States Department of Labor, Employment and Training Administration. Once the state levels are established, the Department of Commerce (FLORIDACOMMERCE) must negotiate and reach agreements with the Local Workforce Development Boards regarding their local performance targets.
Staff Recommendations	Staff will review performance for the 3rd quarter of PY2025-2026.
Supporting Material	LWDB 20 PY2025-2026 3rd Quarter Performance
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

Measures	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 3rd Quarter Performance	PY2025-2026 % of Performance Goal Met For Q3	PY2025-2026 Performance Goals
Adults:												
Employed 2nd Qtr After Exit	94.6	101.39	93	99.68	93.3	91.9	98.50	88.2	94.53	91.3	97.86	93.3
Median Wage 2nd Quarter After Exit	\$14,963	151.35	\$14,341	145.06	\$9,886	\$14,879	150.51	\$13,735	138.93	\$13,156	133.08	\$9,886
Employed 4th Qtr After Exit	94	103.18	92.2	101.21	91.1	92.9	101.98	92.2	101.21	94.3	103.51	91.1
Credential Attainment Rate	92.5	107.93	89.4	104.32	85.7	89.7	104.67	88.2	102.92	85.5	99.77	85.7
Measurable Skill Gains	86.9	122.05	99.3	139.47	71.2	85.9	120.65	86.9	122.05	86.5	121.49	71.2
Dislocated Workers:												
Employed 2nd Qtr After Exit	88.9	96.63	88.9	96.63	92	87.5	95.11	85.7	93.15	100	108.70	92
Median Wage 2nd Quarter After Exit	\$10,113	101.13	\$9,661	96.61	\$10,000	\$7,772	75.82	\$8,092	78.95	\$11,020	107.51	\$10,250
Employed 4th Qtr After Exit	100	109.89	100	109.89	91	88.9	97.69	88.9	97.69	87.5	96.15	91
Credential Attainment Rate	100	112.11	100	112.11	89.2	100	112.11	100	112.11	100	112.11	89.2
Measurable Skill Gains	75	93.87	100	125.16	79.9	100	125.16	77.8	97.37	100	125.16	79.9
Youth:												
Employed 2nd Qtr After Exit	91.2	113.15	87	107.94	80.6	80.8	100.25	77.8	96.53	79.2	98.26	80.6
Median Wage 2nd Quarter After Exit	\$4,909	140.26	\$4,565	130.41	\$3,500	\$4,608	121.26	\$4,608	121.26	\$4,238	111.51	\$3,800
Employed 4th Qtr After Exit	93.3	127.81	93.7	128.36	73	92.6	126.85	87	119.18	83.6	114.52	73
Credential Attainment Rate	88.4	100.23	88.4	100.23	88.2	79.1	87.79	72.5	80.47	70.2	77.91	90.1
Measurable Skill Gains	96.3	111.59	98.6	114.25	86.3	93.5	108.34	94.2	109.15	100	115.87	86.3
Wagner Peyser:												
Employed 2nd Qtr After Exit	65	98.04	64.2	96.83	66.3	63.4	95.63	62.8	94.72	63.3	95.48	66.3
Median Wage 2nd Quarter After Exit	\$7,862	124.89	\$7,800	123.91	\$6,295	\$7,670	121.84	\$7,526	119.56	\$7,461	118.52	\$6,295
Employed 4th Qtr After Exit	63.8	102.74	64	103.06	62.1	64.1	103.22	64.3	103.54	63.4	102.09	62.1

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

AGENDA ITEM SUMMARY

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

Dear **[Senator/Representative]** _____,

On behalf of **[Name of Your Local WDB]**, I urge you to reject any proposal for fiscal year 2027 (FY27) that would drastically reduce funding for the U.S. Department of Labor and instead support strong, dedicated funding for Workforce Innovation and Opportunity Act (WIOA) programs.

[Name of Your Local WDB] serves **[City/State/Region]**, connecting thousands of workers and job seekers each year with training, career services, and support that lead to meaningful employment. Federal WIOA funding is the backbone of this work and ensures that individuals facing the greatest barriers to employment receive the help they need.

President Trump in his budget proposal and House Appropriators have each proposed drastic reductions for WIOA Title I formula funding for Adult, Youth, and Dislocated Worker programs. These cuts come at a time when demand for workforce services is rising, not falling. **[Insert local data here: unemployment trends, major layoffs, industries hiring, populations served, etc.]**

Additional pressures—including expanded work requirements in safety-net programs and the rapid pace of technological change—mean more individuals will rely on the public workforce system for reskilling and career transitions.

For these reasons, we ask Congress to fund the **WIOA Title I Adult program at \$1.5 billion in FY27**, a level that better reflects the scale of need in communities like ours. Federal workforce investment has declined dramatically over the past several decades, even as the labor force has grown and other nations have increased their commitments. The FY27 proposal would move the United States further away from meeting current and future workforce demands.

We also urge you to maintain and increase funding for WIOA Title I Youth and Dislocated Worker programs, preserve funding for Adult Basic Education, restore funding for the Senior Community Service Employment Program (CSCEP), preserve the Dislocated Worker National Reserve, restore standalone apprenticeship funding, and protect critical workforce data infrastructure such as the Workforce Data Quality Initiative.

We welcome the opportunity to share more about our work in **[Region]** and the impact of federal workforce investments. Please feel free to contact **[Your Name]** at **[Contact Information]**.

Respectfully, **[Name / Title / Organization]**