

**Executive Board and Board of Directors  
Joint Board Meeting  
Wednesday, April 15, 2026 –1:30 p.m.**

**Join ZOOM Meeting**

<https://us02web.zoom.us/j/88292101980?pwd=baJfampKJtw0O6HFxWhGV7yjEfvNA8.1>

**Call-in Number: 305-224-1968**

**Meeting ID: 882 9210 1980**

**Passcode: 889340**

**As courtesy to others:**

1. Please remember to mute your phone if you are not speaking.
2. Please do not put this call on hold if your telephone system plays hold music.

Please let us know if you hear static, echoing, or any other interference on the line; or if you cannot hear others.

**Call 863-385-3672 and ask for Caleb, or Matthew, if you have these or other connectivity issues.**

**AGENDA**

Prior to the start of the meeting, Chair Royal to invite all those present to join in an invocation and Pledge of Allegiance.

**I. CALL TO ORDER**

The meeting will be jointly called to order by Board Chair David Royal and Commissioner Kevin Roberts, Executive Board Chair

- Chair Royal to inquire/announce if any *Requests for Public Comment* have been made.

**II. INTRODUCTIONS**

- General Introductions by Board members present and participating by phone, and all others present.
- Chair Royal to inquire if there are any others on the phone who have not been identified, and request that they identify themselves by name and agency/organization.

**III. SET/AMEND AGENDA: Requires Board and Local Elected Officials (LEO) Approval**

**IV. CONSENT ITEMS: Requires Board and Local Elected Officials Approval TAB 1**

- January 20, 2026- Finance & Operations Committee Meeting Minutes.....Page 1
- January 21, 2026- Business Enhancement Committee Meeting Minutes.....Page 4
- January 21, 2026- Youth Council Committee Meeting Minutes.....Page 5
- January 28, 2026- Joint Board Meeting Minutes.....Page 6
- **Action-** Request to Revise Revision of Employee Handbook (F&O).....Page 12
- **Action-** Request to Contract for Auditing Services (F & O).....Page 13
- **Action-** Request to Contract with IT Provider for Managed Services (F & O).....Page 14

**V. EXECUTIVE BOARD CHAIR/BOARD OF DIRECTORS CHAIR ACTIONS TAB 2**

**A. Executive Board: Commissioner Jerod Gross, Executive Board Chair Elect**

**ACTION ITEM(S): Requires LEO Approval**

1. Executive Board Appointment of New Board Member.....Page 15

**B. Board of Directors: David Royal, Chair**

**ACTION ITEM(S): Requires Board and LEO Approval**

None

**VI. PRESENTATIONS TAB 3**

**A. David Royal, Nutrient Stewardship Director, The Nature Conservancy:  
Changing in Florida Agriculture**

**VII. COMMITTEE REPORTS/ACTIONS: Requires Board and LEO Approval TAB 4**

**A. Business Enhancement: David Royal, Chair**.....Page 16

Mr. Royal and/or Mrs. Doubleday to report on the April 8, 2026, meeting

**ACTION ITEM(S):**

1. Review and Discussion of CSH Education and Industry Consortium/Sector Strategies  
Quarterly Report.....Page 17
2. Waiver Request for ITA Expenditure Rate.....Page 42

**B. Finance & Operations Committee: William Allbritton, Chair**.....Page 43

Mr. Allbritton and or Mrs. Doubleday to report on the April 7, 2026, meeting.

**ACTION ITEMS: Requires Board and Local Elected Officials (LEO) Approval**

1. Sunshine Staffing to Serve as EOR - WIOA (F&O).....Page 44
2. Sunshine Staffing to Serve as EOR - CSH (F&O).....Page 45

**INFORMATION ITEM(S)**.....Page 46

1. Taylor, Hall, Miller, Parker P.A. Contract Renewal for Monitoring
2. Indirect Cost Allocation Changes
3. CEO Travel and Credit Card Charges

**VIII. EXECUTIVE REPORTS TAB 5**

**A. President/CEO Report: Donna Doubleday**

1. President/CEO Report. The report provides information and an overview of activities  
and events since the last Board Meeting.....Page 47
2. Kudos Received.....Page 84
3. Workforce Acronyms.....Page 85

**B. Programs Report**.....Page 87

**C. Finance Reports: 7/1/2025 through 2/28/2026**.....Page 90

**IX. TIME FOR BOARD MEMBERS/ OTHER**

**A. Updates by Economic Development Representatives and/or their respective Commissioner**

Desoto County- Hardee County- Highlands County- Okeechobee County

**B. Center Manager Reports**

- Desoto & Hardee- Robin Rossetti
- Highlands- Melanie Wright
- Okeechobee- Mary Smith

**C. Other items of interest by/for Board Members**

- Discretion of the Board

**X. NEXT BOARD MEETING: June 17, 2026- CareerSource Heartland, Sebring**

**XI. ADJOURN**

**Finance & Operations Committee Meeting**  
**Tuesday, January 20, 2026 – 9:00 a.m.**

**MINUTES**

**I. Call to order**

The meeting was called to order at 9:02 a.m. by Mr. William Allbritton, Committee Chair. Mr. Allbritton inquired if any Requests for Public Comment had been made and was advised that none had been received.

**II. Introductions**

Roll was called to identify and confirm committee members present in the room and those participating by phone. Staff and others present were identified (see end of meeting minutes for attendees). New Community Members Lucy Castillo and Bill Stephenson were introduced. It was determined that quorum had been established.

**III. Topics**

**A. Presentation/discussion of:**

1. The Financial Report for 7/1/25-11/30/2025 was presented. Discussion included comments on the legislative compliance sections of both reports. No expenditure concerns were noted.

**B. Action Items:**

**1. Request to Apply to Continue as a Direct Service Provider**

Referring to the Action Item in the agenda packet, Ms. Donna Doubleday (CSH President/CEO) explained that CareerSource Heartland (CSH) has been operating as Direct Service Provider of “One-Stop” Operations since 2008 (then Heartland Workforce). CSH’s current approval to operate as such expires June 30, 2026. CSH will need to either procure a service provider for career services or submit a request for an extension to continue to provide career services as of July 1, 2026. Ms. Doubleday elaborated on the many benefits seen for CSH to operate as a Direct Service Provider, as outlined in the Action Item. Following Committee review and discussion, Chair Allbritton called for a motion.

- A motion was made by committee member, David Royal, to recommend Board approval of the Request to Apply to Continue as a Direct Service Provider, with an effective date of July 1, 2026.
- Motion seconded by committee member, Glenn West.
- Motion carried unanimously.

**2. Request Transfer of Dislocated Worker Funding to Adult Funding**

Referring to the action item in the agenda packet, Ms. Doubleday (CSH President/CEO) explained that with Governor approval Local Workforce Boards may transfer up to 100% of Dislocated Worker (DW) funds for expenditure on WIOA Adult activities. She reviewed the history of Board requests, the amount of the current request, and the justification for this request, as outlined in the Action Item. She indicated that (\$103,000.00) would remain available for DW activities should the need arise. No concerns were noted. Glenn West inquired if the remaining 50% would be available for next year if not expended and he was advised it would be.

- A motion was made by committee member, Bill Stephenson, to recommend Board approval to submit a request to transfer \$103,000.00 of PY 2025-2026 allocated Dislocated Worker funding for expenditures on Adult activities.
- Motion seconded by committee member, David Royal.
- Motion carried unanimously.

### **3. Request to Revise Employee Handbook- Leave Use and Payout**

Referring to the action item in the agenda packet, Donna Doubleday (CSH President/CEO) explained CareerSource Heartland's (CSH) long-standing policy has been that employees begin accruing time off upon start date and can use accrued time immediately. New hires accrue 5 hours of PTO for each pay period where they are present (or on approved time off) for at least 50% of that pay period. The CSH Employee Handbook (approved policy) also allows payout of accrued time unless an individual is terminated for cause. Staff recommends delaying use of accrued time until successful completion of the 90-day introductory (probation) period and not providing payout of accrued leave for anyone who does not successfully complete the 90-day introductory period. The recommended verbiage changes per the Action item are noted in bold, below:

1. **Accrued time off may not be used during the 90-day introductory period.**
2. *"Under no circumstances will employees be paid for unused, accrued PTO if they **do not successfully complete the 90-day introductory period or are terminated for cause, which includes but is not limited to any of the following reasons: misuse or misappropriation...**"*

- A motion was made by committee member, Glenn West, to recommend Board approval of the policy and verbiage changes as presented in the Action Item, to be revised in the Employee Handbook, and to be effective immediately.
- Motion seconded by committee member, Bill Stephenson.
- Motion carried unanimously.

### **4. Request to Increase Contract Sunshine Staffing as Employer of Record for CareerSource Heartland's Temporary Employment Needs**

Referring to the action item in the agenda packet, Donna Doubleday (CSH President/CEO) explained CareerSource Heartland (CSH) benefits from the ability to utilize a staffing agency to meet short-term, temporary hiring needs. Examples include employee vacations, extended leaves of absence, and unexpected or long-term position openings. For Program Year (PY) 25-26, the CSH Joint Boards approved Sunshine Staffing serving as employer of record for CSH temporary employees as the need arises. The maximum dollar amount requested and approved for this purpose through June 30, 2026, was \$7,500.

Staff respectfully requested increasing the total amount of this contract to \$23,000. This is an increase of \$15,500. This would allow CSH to continue to meet emergency needs while searching for the talent needed to properly fulfill open positions. As a related-party contract, Jessy Irizarry, CSH Board member and employee of Sunshine Staffing, abstained from voting on this action and signed a conflict-of-interest form.

- A motion was made by committee member David Royal to recommend that the Board increase the total dollar amount of this contract to \$23,000.
- Motion seconded by committee member, Glenn West.
- Motion carried unanimously.

### **C. Review of Information Items:**

#### **1. PY 2025-26 THMP Financial and Programmatic Monitoring Report**

Taylor, Hall, Miller, Parker, P.A.'s PY 2025-26 Financial Monitoring Quality Assurance Report, including staff responses, was presented. Following review and discussion, no concerns were raised.

**2. 2025 Financial Statements/Audit**

Following the announcement that the Auditors will present the Audit results at the January 28<sup>th</sup> Board Meeting, the Committee briefly reviewed the Single Independent Audit/Financial Statements for the year ending June 30, 2025. Upon recognition that there were no findings, the Committee voiced no concerns.

**A. Review of President/CEO travel and credit card charges**

Michele Arena (CSH CFO) presented the President/CEO's travel expenses and credit card charges. Since the last meeting, there were \$2,481.50 credit card charges for licensing and books needed for the entrepreneurial workshops occurring through the State Rural Initiative Grant. Her travel reimbursement expenses totaled \$146.96.

Committee Chair, William Allbritton, asked if there were any questions or concerns about the expenses as presented. None were noted.

**IV. Other**

No other items were brought before the committee.

**V. Adjourn**

Committee Chair, William Allbritton, adjourned the meeting at 9:22 a.m.

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**Committee members present and participating:** William Allbritton (Chair), Lucy Castillo, Yessenia Irizarry, David Royal, Bill Stephenson, and Glenn West

**Committee members absent:** Rick Herndon

**Public attendance:** None

**CSH staff present:** Donna Doubleday, Michele Arena, Ann Martin, Nica Morgan, and Matthew Horkan

**Business Enhancement Committee Meeting**  
**Wednesday, January 21, 2026**  
**MINUTES**

**I. Call to order**

The meeting was called to order at 9:02 am. by Donna Doubleday, on behalf of David Royal, Committee Chair. Ms. Doubleday inquired if any Requests for Public Comment had been made and was advised that none had been received.

**II. Introductions**

Roll was called to identify and confirm committee members present in the room and those participating by phone. Staff and others present were identified. Quorum had been established. See end of minutes attendance.

**III. Topic**

**Action Items:**

**A. Review and Discussion of the Education and Industry Consortium/Sector Strategies Meeting**

Referring to the Education and Industry Report, Ms. Doubleday shared information gathered regarding trends. A slowdown of retail and housing growth is being seen while the trucking and construction industry are showing some growth, overall, nothing specifically concerning. She also mentioned the special grants that CSH has received that are allowing workshops and training opportunities for basic computer skills, AI training and foundational skills (5G), all being offered by both of the colleges. CSH is operating the Entrepreneurial Program which started in January. The Consortium did not bring any formal recommendations. All members whose membership was to renew or end in December 2025, or January 2026 all stated that they wanted to be renewed as standing members according to the terms of the 2-year commitment set by the committee. There will be some others contacted to join who have expressed interest.

There were no concerns or questions from the Business Enhancement Committee. Senator Grimsley offered the compliment that the Consortium is “doing great work!”. The committee had no recommendations for formal action. The report was accepted as written.

**IV. Other**

No other business was brought before the committee.

**V. Adjourned**

Ms. Doubleday adjourned the meeting at 9:10am.

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**Committee members present and participating:** Andrea Broomfield, Billie Jo Decker, Stephanie Etter, Denise Grimsley, Dawn Hoover, Raymond Royce, Efran Schraeder, Alex Tijerina

**Committee members absent:** David Royal (Committee Chair), Sonja Bennett, Sondra Guffey, Fred Hawkins

**Public attendance:** None                      **CSH staff present:** Donna Doubleday, Ann Martin, Nica Morgan, Matthew Horkan



CareerSource Heartland  
5901 US Hwy 27 South, Suite 1  
Sebring, Florida 33870

**Youth Council Meeting  
Monday, January 26, 2026 – 9:00 a.m.  
MINUTES**

Gary Ritter led the Pledge of Allegiance to open the meeting.

**I. Call to Order**

The meeting was called to order at 9:01 a.m. by Gary Ritter, Council Chair. Mr. Ritter inquired if any Requests for Public Comment had been made and was advised that none had.

**II. Introductions**

Roll was called to identify and confirm committee members present in the room and attending virtually. Staff and others present were identified. Attendance did not establish quorum. See end of minutes for all attendees.

**III. Presentations:**

**A. CareerSource Heartland WIOA Youth Program Youth Council Report Presentation**

CSH Program Coordinator, Eddie Cuencas, presented in-depth data on enrollees and closures for in and out of school youth, all closures were positive. He provided details of the transition of the program and how the youth were served seamlessly. He stated that in all counties, community partnerships and relationships remain strong and productive. He illustrated how the different challenges that many of the youth face are being supported through this program. Mr. Cuencas shared achievement stories on current and formerly enrolled youth. He thanked the Committee and the Board for their guidance and support for the program. In closing, he said that the program builds a solid foundation that supports the growth of this four-county region.

Committee member, Glenn West, thanked Mr. Cuencas for being so committed to youth and community.

**IV. Action Items:**

**A. None**

**V. Other**

No other business was brought before the Youth Council.

**VI. Adjourn**

Council Chair, Gary Ritter, adjourned the meeting at 9:29 a.m.

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**Committee members present and participating:** Gary Ritter (Chair), Deborah Mancini, Emily Roesner, and Glenn West

**Committee members absent:** Leigh Ann Bellamy, Joshua Exendine, Skylar Harrison, Christen Johnson, Katherine McAuley, David Royal, and Amanda Wilson

**Community Committee Members:** Christina Martin                      **Public attendance:** None

**CSH staff present:** Michele Arena, Eddie Cuencas, Donna Doubleday, Caleb Henderson, and Nica Morgan

**CareerSource Heartland Joint Board of Directors Meeting  
Wednesday, January 28, 2026**

**MINUTES**

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David Royal led the members in the invocation and The Pledge of Allegiance.

**I. Call to order**

- A. The meeting was jointly called to order at 1:42 p.m. by David Royal (Chair of the Board of Directors) and Commissioner Jerod Gross (Executive Board Chair-Elect).
- B. Chair Royal inquired if any 'Request for Public Comment' had been made and was advised that none had.

**II. Introductions**

Chair Royal introduced himself and then called for introductions by Board members and others, including those participating virtually. Quorum was established. See end of minutes for all attendees.

**III. Set/Amend Agenda**

An amendment to add 3 related-party Action Items under section V. B. 1. was proposed. Chair Royal called for a motion to accept/approve the amended meeting agenda.

- A motion was made Board member, Stephanie Etter, to approve the agenda with the amendment as proposed.
- Motion seconded by Board member, Efran Schraeder.
- Motion carried.
- LEO approved.

**IV. Consent Items**

Chair Royal inquired if there were any questions/corrections to any of the consent items presented. No corrections were noted. He called for a motion to accept the minutes from the: January 20, 2026 Finance & Operations Committee; January 21, 2026 Business Enhancement Committee; January 26, 2026 Youth Council Committee; and the October 22, 2025 - Joint Board Meeting Minutes; Action- Request to Apply to Continue as a Direct Service Provider (F&O); Action- Request to Transfer PY 25-26 DWG to Adult (F&O); Action- Request to Revise Employee Handbook (F&O); and Action- Review & Discussion - Education & Industry Consortium Meeting. It was noted that the Action Items included in the Consent agenda were vetted by the Board Committees identified in the agenda.

- A motion was made by Board member, Jessy Irizarry, to approve the presented minutes.
- Motion seconded by Board member, Gary Ritter.
- Motion carried.
- LEO approved.

**V. Executive Board/ Board of Directors Chair Actions**

**A. Executive Board: Commissioner Jerod Gross, Executive Board Chair Elects**

**1. Action Item(s): Affirmation of Mandatory Board Membership Representative Change**

Referring to the Action Item, Commissioner Gross explained that the Chief Local Elected Officials CLEOs must select members according to criteria established by the Governor and the State,

which ensures a majority of its members represent business and meet the required Board composition. CareerSource Heartland requested affirmation of Sharon Wright's appointment to the CareerSource Heartland (CSH) Board of Directors. Ms. Wright has been appointed as the Area Director for the Division of Vocational Rehabilitation, nominated to serve in place of Wayne Olson who retired in October. Commissioner Gross read her bio into the record, welcomed her and asked for a motion to be approved by the board.

- A motion was made by Executive Board member, Commissioner Sumner, to affirm the mandatory Board membership of Ms. Sharon Wright.
- Motion seconded by Executive Board member, Commissioner Miller.
- Motion carried unanimously.

**B. Board of Directors: David Royal, Chair**

**1. Action Item(s): Requires Board and LEO Approval**

**a. Action- Workforce Services Contract – Hardee County Property Appraiser**

The Hardee County Property Appraiser has requested training funds in the amount not to exceed \$5,000 to provide work-based training opportunities to meet their workforce needs. The initial training request is for multiple employees to attend office skills, AI, and 5G Power Skills (foundational skills) training. These classes are being made available through CSH's State Rural Initiatives Grant. Staff requests approval of a Workforce Services Contract for this purpose, with a completion date of June 30, 2026.

As this is a related-party contract, Commissioner Kenny Miller, CSH Executive Board member and Commissioner on the Hardee County Board of County Commissioners, abstained from voting on this action and signed a conflict-of-interest form.

Following brief discussion, Chair Royal called for a motion.

- A motion was made by Board Member, Glenn West, to approve a Workforce Services Contract with the Hardee County Property Appraiser in an amount not to exceed \$5,000, with a completion date of June 30, 2026.
- Motion seconded by Board Member, Jessy Irizarry.
- Motion carried unanimously.
- LEO approved.

**b. Action- Workforce Services Contract – Hardee County Sheriff's Office**

The Hardee County Sheriff's Office has requested training funds in the amount not to exceed \$1,080 to provide work-based training opportunities to meet their workforce needs. The initial training request is for Microsoft classes for 6 employees. These classes are being made available through CareerSource Heartland's State Rural Initiatives Grant.

Staff requests approval of a Workforce Services Contract for this purpose, with a completion date of June 30, 2026.

As this is a related-party contract, Commissioner Kenny Miller, CSH Executive Board member and Commissioner on the Hardee County Board of County Commissioners, abstained from voting on this action and signed a conflict-of-interest form.

Following brief discussion, Chair Royal called for a motion.

- A motion was made by Board Member, Stephanie Etter, to approve a Workforce Services Contract with the Hardee County Sheriff's Office in the amount not to exceed \$1,080, with a completion date of June 30, 2026.
- Motion was seconded by Board Member, Efran Schraeder.
- Motion carried unanimously.

- LEO approved.

c. **Action- Workforce Services Contract – Highlands County Board of County Commissioners**

The Highlands County Board of County Commissioners has requested training funds in the amount not to exceed \$10,800 to provide work-based training opportunities to meet their workforce needs. The initial training request is for Customer Services training for forty (40) employees. These classes, a component of the 5G Power Skills curriculum, are being made available through CSH’s State Rural Initiatives Grant. Staff requests approval of a Workforce Services Contract for this purpose, with a completion date of June 30, 2026.

As this is a related-party contract, Commissioner Kevin Roberts, CSH Executive Board member and Commissioner on the Highlands County Board of County Commissioners, must abstain from voting on this action and must sign a conflict-of-interest form.

Following brief discussion, Chair Royal called for a motion.

- A motion was made by Board Member, Glenn West, to approve a Workforce Services Contract with the Highlands County Board of County Commissioners in the amount not to exceed \$10,800, with a completion date of June 30, 2026.
- Motion seconded by Board Member, Jessy Irizarry.
- Motion carried unanimously.
- LEO approved.

## VI. Presentations

### A. Corinne LaRoche, CPA - James Moore Certified Public Accountants & Consultants

#### Presentation of Audit Results

Ms. LaRoche of James Moore Certified Public Accountants & Consultants greeted the Boards and turned the meeting over to Spencer Machuga. Mr. Machuga presented the Audit. He stated no issues were identified, nor difficulties encountered, in performing the audit and credited the CSH staff for providing exemplary and detailed evaluation. Chair David Royal expressed his thanks to James Moore and Company and offered acknowledgement to Ms. Doubleday and staff for doing such a good job. Ms. Doubleday complimented James Moore staff for doing a thorough, professional and well-presented job.

### B. Video- Comcast Presentation

The short video documented Scott Bugda from the Okeechobee Branch of CSH receiving a \$5,000 donation check from Comcast in support of the digital skills training provided through CSH.

## VII. Committee Reports/Actions

### A. Business Enhancement Committee: David Royal, Chair/Donna Doubleday/President/ CEO

Ms. Doubleday reported that the Business Enhancement Committee met on 1/21/2026. They reviewed the quarterly report for the December 3, 2025, CSH Education and Industry Consortium Meeting. A copy of the report was included in the Board’s packet in the Consent section. She briefly reviewed the report, adding that the Committee had no recommendations to bring before the Board. Board members expressed no concerns with the information presented and made no recommendations for further action.

### B. Youth Council: Gary Ritter, Chair/ Donna Doubleday, CSH President/ CEO

Mr. Ritter reported that the Youth Council met on 1/26/2026. Mr. Ritter praised Youth Program Coordinator Eddie Cuencas’ presentation, adding that his passion for serving youth was apparent and commendable. The meeting consisted of Mr. Cuencas’ presentation on the Youth Program at CSH.

A copy of the presentation was included in the Board's packet. Ms. Doubleday elaborated on the data from the presentation noting that even with the budget cuts and decrease in staff, for the Youth, the transition from South Florida State College Panther Youth Partners Program to CareerSource Heartland's Youth Program was seamless. The youth themselves never felt unattended. She also shared some of the challenges to youth education and employment and how the program offers mentorship and support to those facing such challenges.

**C. Finance & Operations Committee: William Allbritton, Committee Chair**

Mrs. Doubleday presented the written report submitted by the Finance & Operations for the Committee Chair, William Allbritton. The Committee met on 1/20/2026. A quorum was present at this meeting. There were two new community members introduced, Lucy Castillo and Bill Stephenson. The Committee reviewed the Financial Reports covering 7/1/2025 through 11/30/2025, included in the Board packet beginning on page 120. No concerns were expressed regarding the reports. She mentioned the three action items that were vetted at the meeting, voted on and unanimously recommended for Board approval and brought forth to the Board's Consent Agenda: Request to Apply to Continue as a Direct Service Provider, Request for Transfer of Dislocated Worker Funding to Adult Funding, and Request to Revise Employee Handbook- Leave Use and Payout. A final action item was presented to the board that required 2/3 vote from the board as it is a related party item.

**1. Action- Request to Increase Contract - Sunshine Staffing EOR for CSH (F&O)**

As presented during the January 20, 2026, F & O Committee meeting and with a unanimous vote to approve by the committee, CSH staff requests an increase to Sunshine Staffing's contract to serve as employer of record for CSH temporary employees from \$7,500 to \$23,000, through June 30, 2026. This is an increase of \$15,500. This would allow CSH to continue to meet emergency needs while searching for the talent needed to properly fulfill open positions.

As this is a related-party contract, Jessy Irizarry, CSH Board member and employee of Sunshine Staffing abstained from voting on this action and signed a conflict-of-interest form.

Following brief discussion, Chair Royal called for a motion.

- A motion was made by Board Member, Stephanie Etter, to approve increasing Sunshine Staffing's contract to serve as employer of record for CSH temporary employees from \$7,500 to \$23,000, through June 30, 2026.
- Motion seconded by Board Member, Efran Schraeder.
- Motion carried unanimously.
- LEO approved.

**2. Information Items**

- a. PY 2025-26 THMP Financial and Programmatic Monitoring Report
- b. Financial Statements/Audit
- c. CEO Travel and Credit Card Charges

The Financial and Programmatic Monitoring and Financial Statements/Audit reports were included in the Board's packet. Committee members expressed no concerns regarding the information presented and praised staff for doing a great job.

The Committee reviewed the President/CEO's credit card charges and travel expenses. Since the last meeting Mrs. Doubleday had \$2481.50 in credit card charges for licensing and books needed for the entrepreneurial workshops funded by the State Rural Initiative Grant. Her travel expenses totaled \$145.90, for local travel and workforce-related meetings.

**VIII. Executive Reports**

**A. President/CEO Report: Donna Doubleday**

The report was as presented in the packet with specific mention made to the items updated after the report was submitted below.

- **Board vacancies/changes**  
Congratulations were offered to Sharon Wright being appointed to the Board. She will be filling two seats, both as Government Representative- Vocational Rehabilitation, and Workforce-Community Organization representing individuals with disabilities.
- **Committee Community Members**  
During Florida Commerce monitoring it was learned that each active standing committee must include at least one community member who is a voting member of the Committee but not a member of the Board. Christina Martin (DVR) has been serving as an active community member of CSH's Youth Council. To ensure compliance, three community members have been added to Committee membership as follows:  
Andrew Bennett, Deputy Director for Sebring Airport – Business Enhancement  
Bill Stephenson, Executive Director of Samaritan's Touch Care Center – Finance & Operations  
Lucy Castillo, Farmworker Program Director for Florida Non-Profit Housing – Finance & Operations.
- **Rural Initiatives**  
CSH recently added career readiness and job retention workshops for incarcerated individuals and is working out details with Hardee and Okeechobee County Sheriff's Offices to provide these in the jails.

**B. Programs Report:**

As presented in the packet with no items of note and no concerns voiced.

**C. Finance Report:**

Financial reports for FY 2025-26 YTD November 30, 2025, and financial reports for FY 2025-26 through November 30, 2025, were as presented as explained by Mrs. Doubleday's written report on the activities of the F&O Committee.

**IX. Time for Board Members/Other**

**A. Updates by Economic Development Representatives and/or their respective Commissioners**

Commissioner Jerod Gross provided updates for Desoto County. Commissioner Kenny Miller gave updates for Hardee County. Yarima Cuencas gave updates for Highlands County. Commissioner Michael Sumner and Alex Tijerina reported updates for Okeechobee County.

**B. Center Manager Reports**

CSH Center Branch Coordinator Mary Smith presented updates for Okeechobee and Donna Doubleday gave the updates for the Desoto, Hardee, and Highlands One-Stop Centers, respectively.

**C. Other**

Mr. Ritter gave accolades to Ms. Smith for her community involvement and presence which has helped promote CSH in the county.

Ms. Doubleday thanked Indian River and South Florida State Colleges for their collaboration flexibility, and support with the special grants programs.

Commissioner Gross again commended Ms. Doubleday and her team for doing such a great job on the audit.

**C. Next Board Meeting**

Chair Royal announced the next board meeting will be held on April 15, 2026 at the CSH office in Sebring.

#### **D. Adjourn**

As there were no other matters brought before the Board of Directors and/or the Executive Board, the meeting was adjourned at 2:5 p.m.

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**Board members present/participating:** David Royal – Chair, Andrea Broomfield, Bille Jo Decker, Stephanie Etter, Sondra Guffey, Skylar Harrison, Dawn Hoover, Yessenia Irizarry, Gary Ritter, Emily Roesner, Raymond Royce, Efran Schraeder, Alex Tijerina, Glenn West, Amanda Wilson, and \*Sharon Wright- \*membership approved during the meeting

**Board members absent:** William Allbritton, Leigh Ann Bellamy, Sonja Bennett, Joshua Exendine, Senator Denise Grimsley, Fred Hawkins, Rick Herndon, Christen Johnson, Debbi Mancini, and Katherine McAuley

**Executive Board members present/participating:** Commissioner Jerod Gross- Chair-Elect, Commissioner Kenny Miller, Commissioner Michael Sumner

**Executive Board members absent:** Commissioner Kevin Roberts – Executive Chair

**CareerSource Heartland staff present/participating:** Michele Arena, Donna Doubleday, Nica Morgan, Mary Smith

**Public attendance:** Yarima Cuencas- Highlands EDC, Corinne LaRoche and Spencer Machuga-James Moore

**ACTION ITEM:**

**Request to Revise Revision of Employee Handbook - Leave Use**

In January 2026, CareerSource Heartland's (CSH) joint Boards approved revisions to the use of accrued leave, delaying the use of accrued time until successful completion of the 90-day introductory (probation) period. The approved verbiage is "**Accrued time off may not be used during the 90-day introductory period.**"

CSH has a long-standing policy that a 90-day introductory period is re-implemented for employees who are promoted or otherwise moved into different positions. As written, the recently revised verbiage/policy would negatively impact valuable employees who move into new positions. Staff recommends adding the word "initial" to the verbiage, allowing employees who change positions to use accrued leave time during their new 90-day introductory period.

Suggested revised verbiage:

**Accrued time off may not be used during the initial 90-day introductory period.**

**Action Requested:**

Consider approval to update the verbiage in the Employee Handbook to read "Accrued time off may not be used during the initial 90-day introductory period," to be effective immediately.

**ACTION ITEM:**  
**Request to Contract for Auditing Services**

To ensure compliance with procurement requirements, CSH released a Request for Proposals (RFP) in FY 2024-25 for Auditing Services. CSH's Joint Boards identified James Moore & Co., P.L. as the top proposer and a contract was entered into for PY 2025-26, with the possibility of renewing each year for four additional years contingent upon acceptable service delivery. The initial contract (year one of five possible) with James Moore & Co., P.L. will end on June 30, 2026.

Services provided by James Moore & Co., P.L. include the single independent financial audit, lease liability analysis and calculation, and preparation of CSH's Form 990 Tax Return. For FY 2025-26, the CSH Board approved a contract not to exceed \$37,500. For FY 2026-27, James Moore & Co., P.L. has proposed a 4.4 % increase in fees, as follows:

Audit Fee: \$31,200 (4% increase)  
990 Fee: \$4,200 (5% increase)  
Lease Services: \$3,750 (7% increase)  
**Total Fee: \$39,150 (4.4% increase)**

CSH requests approval to contract with James Moore & Co., P.L. for FY 2026-27 (year two of five possible), in an amount not to exceed \$39,150 as proposed.

**Action Requested:**

CSH staff respectfully requests approval to contract with James Moore & Co., P.L. for Auditing Services for FY 2026-2027, in an amount not to exceed \$39,150.

## **ACTION ITEM:**

### **Request to Contract with IT Services Provider for PY 2026-27**

To ensure compliance with procurement requirements, CSH released a Request for Proposals (RFP) for IT Managed Services in PY 2024-25. CSH's Joint Boards identified Enablewise dba Concertium as the top proposer and a contract was entered into for PY 2025-26, with the possibility of renewing each year for two additional years contingent upon acceptable service delivery. The initial contract (year one of three possible) with Concertium will end on June 30, 2026.

Concertium's services include general IT maintenance monitoring services (including virus and dark web monitoring), management of CSH Microsoft licenses, specific projects addressing Active Directory and Group Policy issues, the correction of hardware or software concerns, and the activation of a successful Disaster Recovery System.

This IT Managed Services contract also provides a host of tools and applications that strengthen CSH's IT network and internal service delivery, such as:

- The ability to remotely manage computers through "automate"
- A help desk ticketing system
- Added Email security
- Antivirus/ antimalware protection
- Deep web monitoring

For PY2025-26, the CSH Board approved a contract not to exceed \$47,000 for these tools, software, applications, licenses, and monitoring services, and allowed for added charges as deemed necessary and as outlined in Concertium's original proposal.

CSH requests approval to contract with Concertium for PY 2026-27 (year two of three possible), in an amount not to exceed \$47,000, and to allow for added charges as deemed necessary and as outlined in Concertium's proposal.

#### **Action Requested:**

CSH staff respectfully requests approval to contract with Concertium for Information Technology Services for PY 2026-2027, in an amount not to exceed \$47,000, and to allow for added charges as deemed necessary as outlined.

## **ACTION ITEM: EXECUTIVE BOARD**

### **Board Member Nomination**

Pursuant to the Workforce Innovation and Innovation Act and as set forth in the Heartland Workforce Investment Consortium's Interlocal Agreement, CareerSource Heartland's (CSH) Executive Board is responsible for appointing members to the CSH Board of Directors. The membership must be consistent with the requirements of federal and state law. New members must be appointed to fill the same category of membership. There is no requirement for new members to be from the same organization, institution, or company as the member being replaced.

CSH's President/CEO has completed the vetting process and presents the nominated candidate for consideration. The Chair of the Executive Board will present the nominee's short biography.

#### **Action Requested:**

Executive Board to consider confirmation of Trudy Williams as a member of CSH's Board of Directors.



2025-2026

*Presentation*

*Changing in Florida*

*Agriculture*



2025-2026  
Business  
Enhancement  
Committee

**ACTION ITEM:**

**Review and Discussion of the  
Education and Industry Consortium/Sector Strategies Meeting**

Senate Bill 240, signed into law May 15, 2023, requires Local Workforce Development Boards (LWDB) to create Education and Industry Consortiums to obtain independent information from stakeholders in the local area. On October 25, 2023, CareerSource Heartland's (CSH) Board of Directors and Executive Board adopted an Education and Industry Consortium Strategic Policy defining the requirements for consortium membership and quarterly reporting.

Education and Industry (E & I) Consortiums serve as independent advisory groups designed to provide community-based information related to educational programs and industry needs, with the intention of informing the LWDB on programs, services, and partnerships in the service delivery area. The LWDB is encouraged to consider the information obtained from the education and industry consortium to determine effective ways to grow, retain and attract talent to the service delivery area.

Sector Strategies (SS) are industry-focused regional approaches that bring together employers, educators, workforce systems, and community organizations to address workforce needs and promote economic growth.

To promote efficiency, in April 2025, the CSH Boards voted to combine the (E & I) and SS Initiative meetings.

CSH held its third combined quarterly Education and Industry Consortium/Sector Strategies meeting on March 11, 2026. The report is included for review and discussion. Based on the quarterly report, this Committee may elect to recommend actions for Board consideration.

**Action Requested:**

Committee and Board Discretion

# Local Workforce Development Board 19 CAREERSOURCE HEARTLAND EDUCATION AND INDUSTRY CONSORTIUM] QUARTERLY REPORT

## A. GENERAL INFORMATION

**Report quarter:** January 2026 – March 2026

**Date of meeting:** March 11, 2026

**Report prepared by:** D Doubleday, N Morgan

**Local workforce development board contact:** D Doubleday **Date:** March 11, 2026

## B. ATTENDANCE

Name	Organization	Industry or Education Organization	Contact Information
Krystin Chapman	The Development Group	Industry-Economic Development	<a href="mailto:kchapman@thedevelopmentgroup.net">kchapman@thedevelopmentgroup.net</a>
Maria Johnson	Indian River State College	Education	<a href="mailto:mgjohnso@irsc.edu">mgjohnso@irsc.edu</a>
Kristie Mathey-Demedicis	Larson Dairy, Inc.	Agriculture	<a href="mailto:ldicorp@embarqmail.com">ldicorp@embarqmail.com</a>
Paola Mogle	School Board of Highlands County	Education	<a href="mailto:morgans@highlands.k12.fl.us">morgans@highlands.k12.fl.us</a>
Zachary Ramcharan	Indian River State College	Education	<a href="mailto:zramchar@irsc.edu">zramchar@irsc.edu</a>
Daryl Roehm	Okeechobee County School District	Education	<a href="mailto:roehmd@okee.k12.fl.us">roehmd@okee.k12.fl.us</a>
Claire Thomas	Peace River Electric Co-operative	Electric Power Generation	<a href="mailto:claire.thomas@preco.coop">claire.thomas@preco.coop</a>

Donna Doubleday	CareerSource Heartland	Workforce	<a href="mailto:ddoubleday@careersourceheartland.com">ddoubleday@careersourceheartland.com</a>
Ann Martin	CareerSource Heartland	Workforce	<a href="mailto:amartin@careersourceheartland.com">amartin@careersourceheartland.com</a>
Nica Morgan	CareerSource Heartland	Workforce	<a href="mailto:emorgan@careersourceheartland.com">emorgan@careersourceheartland.com</a>

## B. SUMMARY REPORT

### I. Welcome

The Consortium Vice-Chair, Daryl Roehm, welcomed participants and reminded everyone of the three key components that are the focus of this Consortium, which will always be shown at the top of the agenda.

1. Summary Analysis of local labor market based on the industry representative needs and educational offerings.
2. Information on priority industry sectors and occupations for the local area; and
3. Information on the status of existing talent pipelines for in-demand occupations.

Mr. Roehm introduced new Consortium member Zachary Ramcharan and welcomed him to the group. He went on to thank The Development Group (TDG) for their hospitality and willingness to host today's meeting.

Ms. Sarah Evers, CEO of TDG, welcomed the group and shared a brief overview of TDG's purpose and mission.

## **II. Discussion**

### **A. Labor Market Information**

#### **Florida By the Numbers (FloridaCommerce Handout ) & Florida Target Industries (Target Industry Report – 2005, pg. 7)**

Members reviewed the Florida by the Numbers- FloridaCommerce handout of March 2026 & page 7 of the Florida Target Industry 2025 report. One member shared that Ag Tech sector is growing, as is maritime production manufacturing, which will help this area. One member indicated surprise that Hospitality was not on the list, since it is such a huge industry in Florida. Another member noted a rise in the Aviation Industry in the local area, to include businesses handling maintenance, repair, and operations, as well as flight schools. A comment was made that a company that refurbishes airplane parts is in negotiations to move their headquarters to this area. It was also noted that one local airport is working on extending runways to enhance commerce opportunities.

### **B. Existing Talent Pipelines**

#### **The Evolution of Economic Development**

Krystin Chapman from The Development Group (TDG) presented "Redefining Rural Economic Development," illustrating the plans and development in the greater Wauchula area with a focus on downtown. Ms. Chapman defined TDG as the lead economic and community development organization and highlighted the importance of partnership with other community entities. Her presentation focused on the new approach to economic development in rural areas, from traditional "job creation" to a broader, place-based approach. She went on to illustrate the actions taken by TDG and Hardee County to create a community that offers a business-friendly atmosphere where people want to live, work, and recreate. To this end, The TDG's defined its five pillars for growth: Housing & Quality of Life; Health Care; Education & Workforce; Transportation & Infrastructure; and Recreation & Tourism.

The area's evolution started with a "whole community" approach. A survey was developed and sent out using a multi-modal approach to determine what residents want the community to be. Survey results indicated that residents viewed *Agriculture, Farming, and Ranching*, and *Phosphate* as the County's most important industries. Some of the top priorities for growth included job training programs, improving k-12 education, and added housing supply.

Ms. Chapman highlighted projects/businesses that have drawn jobs into Hardee County, as well as new initiatives that will continue job growth, create housing to support the workforce, increase recreation activities, and revitalize the downtown area. She discussed grants received, processes for obtaining project proposals, and the commerce park. She added that with the revitalization of the downtown area and the creation of new spaces, there are new and more inquiries from retail and restaurants. The goals are to offer jobs, recreation areas and housing to support market growth, "To really make Wauchula an enriching place to live."

Her presentation sparked questions about the survey questions and response rates. Ms. Chapman reported that a company was used to assist with question development. The response time was limited to a few weeks. Responses were encouraged through community messaging, texting, emails, online messages, social media, and phone calls. The response rate was much higher than the norm. An idea of questions asked can be viewed on TDG's website.

Ms. Chapman added another method TDG is using to spur local revitalization is the implementation of the 6-week "Building a Vibrant Community" curriculum. This curriculum serves as a blueprint that empowers area residents to generate ideas and action plans to create a vibrant, thriving, community.

When asked what are the biggest concerns of businesses that are considering moving to the area, Ms. Chapman responded, "Workforce and workforce training availability."

Consortium members congratulated TDG for their efforts and thanked Ms. Chapman for her interesting and informative presentation.

### III. Other

#### Members- Industry Updates

One member shared that it is business as usual in health care industry even though reportedly fewer Canadians visiting the area this year has impacted the volume of healthcare services typically offered during the winter months.

One member shared their business is experiencing an issue with job retention of customer care employees, with turnover often occurring after just 2-3 weeks of employment. The business is trying to determine the disconnect. Issues include prioritization of time, and use of personal phone while on the job. For many of their new hires into this position, this is their first real job. The issues do not appear to reflect deficit in hard skills. The company offers 6 weeks of training and provides extensive support to new hires. When queried, the employees stated they did not have enough access to their personal phones or understand the standards for work time.

CareerSource Heartland (CSH) staff members reported that several businesses have identified retention as a growing concern, and use of personal phones as an ongoing major concern.

CSH shared details on the 5G Leadership (foundational skills), Artificial Intelligence, and Microsoft Office Skills training courses available to businesses through a special grant that allows CSH to reimburse businesses 100% of tuition costs, adding this grant will end on 06/30/2026.

Okeechobee Economic Development promotes several initiatives that promote early workforce development, including recent Early Career Events where participants had hands-on meetings with employers and equipment that was very well received, and the annual Junior Leader Skills Camp.

Members shared more information on the rise of the Aviation Industry and local focus on activities to promote commerce at local airports. Three area airports are seeking approval and funding for runway expansion, and a fourth recently began construction on a new taxiway to improve aircraft ground movement.

Vice-Chair Roehm thanked all for their input, with a special thank you to Ms. Chapman for her presentation and to TDG for hosting today's meeting. He added that the group will meet again in the next quarter. The meeting was adjourned.

# Redefining Rural Economic Development

Engaged • Innovative • Effective • Purposeful



**Economic  
Development  
Authority**

Main funding source  
for infrastructure and  
business investment



**Industrial  
Development  
Authority**

Implements economic  
development projects

# The Development Group

Lead Economic & Community Development Organization



**Main Street  
Wauchula & CRA**

City of Wauchula  
economic  
development leaders



**Hardee County  
Chamber of Commerce**

Business retention,  
marketing, and  
recruitment

# TDG's "Five Pillars" for Growth



## HOUSING & QUALITY OF LIFE

Championing  
Hardee county's  
quality of life



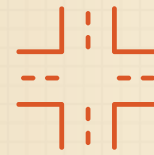
## HEALTH CARE

Pursuing  
Excellence in  
Health for Citizens



## EDUCATION & WORKFORCE

Developing Talent  
For A Modern  
Workforce



## TRANSPORTATION & INFRASTRUCTURE

Investing In  
Infrastructure Built  
For Smart Growth



## RECREATION & TOURISM

Creating Spaces  
Where People  
Want To Gather

# PROJECTS

BUSINESS - INFRASTRUCTURE

## BUSINESSES

- Costa
- Mach
- Connections
- Rapid Systems
- Stream2Sea
- Florikan
- Aloha Medical Services
- Innovar Structures
- Kinbro
- TrussWorks
- Steele Equine
- Debut Development
- Bakery
- Bowling Alley
- Mancinis
- Ecosteris



# Mach Connections:

- Manufactures Boat Harnesses
- 2006 - Bought Land in Commerce Park
  - 8 Acres
  - \$219,510
  - Built 40,000 sq. ft. Building
- Expanded into 22,500 sq. ft. Building
- Currently 140+ Employees



# Stream2Sea:

- Started in Incubator
- Now Located in Commerce Park
- Harper's Bazaar
- Virgin Voyages



# Florikan:

- 70 + Employees
- Inducted into Space Technology Hall of Fame
- Recruited to Hardee County from Sarasota



# Mancini Foods:

- Food Manufacturing
- 75 - 100 Employees
- Engaged in Local Community
- Offers Employees On-the- Job Training



# Commerce Park Expansion:

- 104 Acres
- 20 Shovel Ready Lots
- \$4.36 Million in Grants
- \$1,150,000 Taxable Value Increase



# Lot 27



- **Completed**
  - Interior Framing in Office Space
  - South and West Walls of EFIS and Final Colors.
  - Fire Sprinkler Rough-In – Office Space
- **In Progress/Next Steps**
  - Interior Framing in Production Space –Wrapping Up This Week
  - EFIS/ Stucco – Completing North Wall then Final Trim Work – – End of December
  - MEP Rough-Ins
  - Fire Sprinkler Rough-In – Production Area
- **Estimated Completion:**
  - Q1 2026

# Multi-Purpose Facility

## Completed

- Met with SFSC
- Visit to Catapult in Lakeland

## In Progress

- Proposal for Structural Scans
- MEP Review with Staff
- Second Round of Layout Options



# East Main Collective Property

## In Progress

- Proposal to Proceed with Final Layout

## Next

- Final Layout Options
- Budget
- Construction Timelines



# 122 West Main

## In Progress

- Business Contest Plan Discussion
- Civil Drawings for Engineer Review
- Final GMP



# Gardens at Midtown



- Located Behind Gym Cats, Terra, and Java Café
- 8 Residential Units
- Improved Parking
- Grant Funding

# Torrey Preserve



- Obligation of LDA
- **Phase One: 45 Lots**
  - 9 approx. 1-Acre Road Frontage lots on Hanusch Road
  - 31 - 70' wide .25 Acre lots
  - 5 - 85' wide .33 Acre lots
- **Phase Two: 33 Lots**
  - 33 - 80' wide .25 Acre lots
- **Phase Three: 32 Lots**
  - 16 - 85' wide .33 Acre lots
  - 16 - 70' .25 Acre lots
- **Next Steps:**
  - Developers Agreement
  - PUD

# 533 Carlton St.



- **Demolition Complete**
- **Housing Proposed**
- **RFQ for Developers**
- **Complements Improvements in Area**



| THE



I THE



**ACTION ITEM:**  
**50% ITA Expenditure Requirement**  
**Consideration of Waiver Request**

At least 50 percent of the Title I funds for Adults and Dislocated Workers passed through to Local Workforce Development Boards (LWDB) must be expended on Individual Training Accounts (ITA) unless the LWDB obtains a waiver from CareerSource Florida (CSF). In July 2012, state law reduced and limited allowable expenditures under this category but gave CareerSource Florida (CSF) the authority to grant LWDBs the ability to apply for a waiver from the requirement.

Recognizing that LWDBs have fixed overhead costs that impact the ITA expenditure requirement, CSF has approved an ITA waiver policy that identifies a sliding scale component and allows regions to select a waiver percentage based on two options: 1) the ITA percentage identified in the sliding scale table, or 2) another percentage based on the organization's need. LWDB's choosing to accept the percentage identified in the sliding scale table no longer need to formally request a waiver.

Local workforce development areas not meeting their agreed upon ITA expenditure percentages are not eligible to receive any incentive funding that may become available.

Historically, CareerSource Heartland has applied for and received waivers for rates between 25% and 30% ITA expenditure rate. Decreased allocations and low unemployment rates continue to have a dramatic impact on LWDBs' ability to meet a 50% expenditure requirement. Staff's recommendation is to request a 30% ITA expenditure rate waiver for FY 2026-2027.

**Action Requested:**

To consider approval of staff's recommendation to request a 30% ITA expenditure rate waiver for FY 2026-2027.



2025-2026

Finance

&

Operations

Committee

**ACTION ITEM:**

**Request to Contract with Sunshine Staffing to Serve as Employer of Record for WIOA Transitional Jobs and Work Experience**

CareerSource Heartland (CSH) has a contract in place with Sunshine Staffing (SS), to serve as Employer of Record for Workforce Innovation and Opportunity Act (WIOA) job seekers enrolled in Transitional Jobs (TJ) and Work Experience (WE) training opportunities.

The current contract, which ends June 30, 2026, is in year two of three possible contract periods. The initial contract amount for year one was not to exceed \$150,000 issued in \$25,000 increments.

CSH has been successful in the implementation of this initiative and intends to enhance and carry the program forward into PY 2026-27. This service provides customers with added work-based learning/training options, and CSH with a greater opportunity to meet the state-mandated ITA expenditure compliance.

- ❖ As a related-party contract, Jessy Irizarry, CSH Board member and employee of Sunshine Staffing, must abstain from voting on this action and must sign a conflict-of-interest form.

**Action Requested:**

CSH staff respectfully requests approval to renew the Sunshine Staffing employer of record Transitional Jobs/Work Experience Training contract for year three of three in an amount not to exceed \$150,000 and obligated in increments of \$25,000 based upon program needs.

**ACTION ITEM:**

**Request for Sunshine Staffing to Serve as Employer of Record for CareerSource Heartland Temporary Employment Needs**

On occasion, CareerSource Heartland benefits from the ability to utilize a staffing agency to meet short-term, temporary hiring needs. Examples include employee vacations, extended leaves of absence, and unexpected or long-term position openings.

For PY 2026-27, CSH staff respectfully requests the opportunity to use Sunshine Staffing as a vendor to serve as employer of record for CSH temporary employees as the need arises. Since Jessie Irizarry is a CSH Board member and employee of Sunshine Staffing, this would be a related-party contract requiring CSH Board approval. The not to exceed dollar amount requested for this purpose through June 30, 2027, is \$9,500.

Historically, Sunshine Staffing has quickly responded to the needs of this organization.

- ❖ As a related-party contract, Jessie Irizarry, CSH Board member and employee of Sunshine Staffing, must abstain from voting on this action and must sign a conflict-of-interest form.

Approval by two-thirds of the Board, a quorum having been established, is required.

**Action Requested:**

Consider CSH staff's request for approval to use Sunshine Staffing as a vendor to serve as employer of record for CSH temporary employees as the need arises, July 1, 2026, through June 30, 2027, allowing an amount not to exceed \$9,500.00 for this purpose.

April 15, 2026

## Finance & Operations Committee

### **INFORMATION ITEMS**

1. Taylor, Hall, Miller, Parker P.A. Contract Renewal for Monitoring
2. Indirect Cost Allocation Changes
3. CEO Travel and Credit Card Charges

**President/CEO Report**  
**April 15, 2026**

**Information Items:**

a. The Education and Industry Consortium/Sector Strategies meeting was held on March 11, 2026. The goal of this independent advisory committee to the Board is to align local educational programming with local industry needs. Meeting reports are shared/reviewed by this Board’s Business Enhancement Committee (BEC) for strategic planning purposes. BEC recommendations are brought to the Board for consideration.

b. Board vacancies/changes:

Previous Member	Reason for Leaving	Seat	New Member*
Katherine McAuley	Moving out of Florida	Private Business- Desoto Healthcare/Human Resources	Trudy Williams

\* Upon approval of the Executive Board

**Note:** Gary Ritter, City Administrator for the City of Okeechobee, has announced his retirement, scheduled for July 2026. Mr. Ritter has been an active and involved member since his appointment to the Board on October 2015. He has served as Chair of CSH’s Youth Council since 2018 and throughout his membership has served on several proposal rating committees. He almost never misses a meeting and always contributes great questions and suggestions for discussion and consideration.

c. Infrastructure (IFA) Cost Sharing Agreements: The IFA reconciliation process for the semi-annual period of July 1, 2025, through December 31, 2025, has begun.

d. The Infrastructure Funding Agreement/Memorandum of Understanding (IFA)/MOU renewal schedule is as follows:

AARP Foundation	expires 9/30/2026
Agriculture and Labor Program, Inc. (ALPI)	expires 6/30/2027
Division of Blind Services	expires 6/30/2027
Division of Vocational Rehabilitation	expires 6/30/2027*
South Florida State College	expires 6/30/2027
Adult Education and Literacy & Career and Technical Education Programs	

\*Note: Due to the downsizing of the CSH Hardee County Career Center, an amendment to the original Division of Vocational Rehabilitation (DVR) MOU/IFA was initiated in July, to be effective October 1, 2025. The amendment decreased the cost sharing amount for DVR since they will no

longer be collocated with CSH in Hardee County. Although there has been some movement, this amendment is still awaiting DVR's approval for signature.

- e. CSH continues to await guidance from CSF concerning submittal of the Regional Planning Area Plan that was approved by this Board in April 2025. (Plan of the Heartland Southwest Florida Regional Planning Area [CareerSource Heartland (LWDB 19) and CareerSource Southwest Florida (LWDB 24)]).
- f. Please see the Programs report for progress on special grant programs.
- g. SNAP – The One “Big Beautiful Bill” Act (H.R. 1) (P.L 119-21) imposed stricter work requirements for SNAP recipients. The law added recipients ages 55-64 to compliance requirements, resulting in increased caseloads. With no increased funding to manage this increase, FloridaCommerce's guidance is to follow the previously distributed Crosswalk and braid funding as much as possible.
- h. FloridaCommerce and CSF continue to respond to the requirements of the Reimagining Education and Career Help Act (REACH) and Senate Bill 240.

**Performance-** For PY 2025-26, CSH met or exceeded 17/18 second quarter performance indicators. The Performance Indicators report is attached. CSH's first quarter letter grade was a B (85.27). The changes in the letter grade methodology appear to have impacted all workforce boards, as all 21 boards' overall scores reflected slight decreases.

1. The Completion-to-Funding Ratio Weight reduced from 10 points to 5 points.
2. Serving Individuals in SNAP, TANF, Adult Education, Blind Services or Vocational Rehabilitation became a core metric weighted at 5 points, rather than an extra credit item. This decreased the total points for letter grades from 105 to 100. Individuals who received SNAP or TANF services AND Adult Education, Blind Services, or Vocational Rehabilitation services will still be weighted at 1.5 in the numerator.

**Master Credentials List (MCL)** - CareerSource Heartland continues to collaborate with businesses, local School Districts' Career and Technical Education Representatives, and the local colleges to address credentials that are slated for removal.

**Florida Workforce Integrated Networking Systems (FL WINS)** – This is the consumer-first workforce development system that seeks to provide Floridians improved access to workforce-related programs and services (consumer first, no wrong door). The FL WINS Learning Management System is now live. This system provides training and resources to help staff leverage additional resources to serve Florida citizens.

- i. **CareerSource Florida (CSF) and FloridaCommerce Policies-**  
In January 2026, CSF's Board of Directors voted to sunset 3 policies/guidance and passed 4 new/revised policies.

Voted to Sunset

- P83 – Direct Provider of Workforce Services
- P91 – Local Workforce Development Board Composition and Certification
- P93 – One-Stop Delivery System and One-Stop Center Certification Requirements

Approved New/Revised Policies

- G104 – Sanctions and Other Required Corrective Actions for Local Workforce Development Boards Who Fail to Meet Federal and State Standards
- G105 – Composition and Certification of Local Workforce Development Boards; Certification of One-Stop Systems and Boards, and Direct Service Provider Designation
- O125 – Business Partnerships, Employer Engagement and Economic Development Support
- P74 – Individual Training Account Expenditure Requirements and Waiver Process

Copies of the new or revised policies are included for review.

j. **Workforce Legislation-**

Federal

The federal budget for the workforce system was approved through PY 2026-27 with mostly level funding (a nationwide decrease of \$10M in WIOA Adult). WIOA reauthorization discussions continue.

Beginning in 2027, H.R. 1 mandates work registration and participation in employment, job training, education, or community service 80 hours/month for Medicaid recipients. Some exemptions apply.

The rulemaking process and public comment period regarding the implementation of the Workforce Pell Grants has concluded. The US Department of Education may amend the proposed regulations in consideration of substantive public comments. The proposed regulations can be found at the link below.

<https://www.federalregister.gov/documents/2026/03/09/2026-04520/accountability-in-higher-education-and-access-through-demand-driven-workforce-pell-pell-grant>


This will change service delivery of workforce boards.

State-

The bill to add Leadership to the Master Credentials List had no companion. It is not expected to be considered for inclusion in any other bills.

The bill to implement H.R. 1 (Medicaid work requirements) had no companion yet still may be considered to keep Florida aligned with federal mandates. If passed, it is anticipated that compliance will be delegated to LWDBs, similar to TANF and SNAP. The Florida Workforce Development Association's (FWDA) Advocate has been actively engaged in discussions to ensure that adequate funding is provided to LWDBs as appropriate.

LWDB 19												
Measures	PY2024-2025 2nd Quarter Performance	PY2024-2025 4-2025 % of Performance Goal	PY2024-2025 3rd Quarter Performance	PY2024-2025 4-2025 % of Performance Goal	PY2024-2025 4th Quarter Performance	PY2024-2025 4-2025 % of Performance Goal	PY2024-2025 Performance Goals	PY2025-2026 1st Quarter Performance	PY2025-2026 5-2026 % of Performance Goal	PY2025-2026 2nd Quarter Performance	PY2025-2026 5-2026 % of Performance Goal	PY2025-2026 Performance Goals
<b>Adults:</b>												
Employed 2nd Qtr After Exit	91.5	107.02	91.1	106.55	97.3	113.80	85.5	94.6	110.64	90.5	105.85	85.5
Median Wage 2nd Quarter After Exit	\$9,750	96.81	\$10,264	101.92	\$10,430	103.56	\$10,071	\$10,452	103.78	\$11,565	114.83	\$10,071
Employed 4th Qtr After Exit	92.1	109.64	93.2	110.95	93.6	111.43	84	95.6	113.81	97.3	115.83	84
Credential Attainment Rate	86.8	99.09	86.4	98.63	89.4	102.05	87.6	95.6	109.13	94.6	107.99	87.6
Measurable Skill Gains	85.2	127.54	80	119.76	94.5	141.47	66.8	87	130.24	79.4	118.86	66.8
<b>Dislocated Workers:</b>												
Employed 2nd Qtr After Exit	100	130.21	100	130.21	100	130.21	76.8	100	130.21	100	130.21	76.8
Median Wage 2nd Quarter After Exit	\$12,199	132.35	\$12,199	132.35	\$12,199	132.35	\$9,217	\$15,623	169.50	\$20,390	221.22	\$9,217
Employed 4th Qtr After Exit	0	0.00	0	0.00	100	124.07	80.6	100	124.07	100	124.07	80.6
Credential Attainment Rate	0	0.00	0	0.00	100	103.52	96.6	100	103.52	100	103.52	96.6
Measurable Skill Gains	100	122.85	100	122.85	100	122.85	81.4	0	#DIV/0!	0	#DIV/0!	0
<b>Youth:</b>												
Employed 2nd Qtr After Exit	93.8	112.34	90.9	108.86	82	98.20	83.5	86	102.99	86.8	103.95	83.5
Median Wage 2nd Quarter After Exit	\$5,530	140.78	\$5,360	136.46	\$5,304	135.03	\$3,928	\$5,304	135.03	\$4,504	114.65	\$3,928
Employed 4th Qtr After Exit	92.3	111.20	96	115.66	93.8	113.01	83	90.9	109.52	84	101.20	83
Credential Attainment Rate	96	109.46	95.8	109.24	100	114.03	87.7	96.8	110.38	95.8	109.24	87.7
Measurable Skill Gains	89.2	98.78	83.1	92.03	92	101.88	90.3	88.5	98.01	74.2	82.17	90.3
<b>Wagner Peyser:</b>												
Employed 2nd Qtr After Exit	66.8	97.23	66.5	96.80	66.1	96.22	68.7	65.7	95.63	66.1	96.22	68.7
Median Wage 2nd Quarter After Exit	\$6,575	104.77	\$6,577	104.81	\$6,827	108.80	\$6,275	\$6,786	108.14	\$6,807	108.48	\$6,275
Employed 4th Qtr After Exit	65.4	102.83	65.1	102.36	64.7	101.73	63.6	63.9	100.47	64.2	100.94	63.6
<b>Not Met (less than 90% of negotiated)</b>												
<b>Met (90-100% of negotiated)</b>												
<b>Exceeded (greater than 100% of negotiated)</b>												

 <b>Workforce Policy</b>		<b>POLICY NUMBER G104</b>
<b>Title:</b>	Sanctions <u>and Other Required Corrective Action</u> for Local Workforce Development Boards <u>Who Fail to Meet</u> Federal and State Standards	
<b>Policy Type:</b>	Programmatic	
<b>Program:</b>	Workforce Innovation and Opportunity Act	
<b>Adopted:</b>	02/20/2020	<b>Revised:</b>

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**I. PURPOSE AND SCOPE**

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The Workforce Innovation and Opportunity Act (WIOA), Section 116, establishes performance accountability requirements for core programs that support employment and training outcomes. Training and Employment Guidance Letter No. 11-19, Change 2,<sup>1</sup> issued by the U.S. Departments of Labor and Education, updates how state performance is evaluated and clarifies that states may lose up to 10% of the Governor’s Reserve funds for repeated failure or non-reporting of results. CareerSource Florida requires Local Workforce Development Boards (LWDBs) to promptly address performance, programmatic, or financial deficiencies to protect funding and avoid penalties. LWDBs play a critical role in advancing the strategic and operational goals of the Governor and the State Workforce Development Board (SWDB) for Florida’s Workforce Development System. The CareerSource Florida Board of Directors, acting as the SWDB, issues policy and guidance aligned with federal and state laws and its strategic priorities to ensure LWDBs, service providers, and career centers deliver services effectively and efficiently. This policy informs LWDBs utilizing WIOA Title I and other funds authorized by the SWDB about potential consequences, including sanctions and remedies, for failing to meet performance measures or violating applicable laws, regulations, standards, or agreement terms with the Florida Department of Commerce (FloridaCommerce).

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**II. KEY OBJECTIVES AND MEASURABLE PERFORMANCE OUTCOMES**

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**A. Key Objectives**

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1. Increase awareness and develop training, as needed for Chief Local Elected Officials (CLEOs), LWDB members, leadership, and staff of LWDBs and career centers about board responsibilities and potential sanctions and remedies for failing to meet performance measures or violating federal and state laws, regulations, standards, or

<sup>1</sup> [Training And Employment Guidance Letter No. 11-19, Change 2](#)

30 the terms of agreements between LWDBs and FloridaCommerce.

- 31 2. Employ sound management practices and controls for the proper expenditure of
- 32 funds passed to LWDBs and administered through FloridaCommerce.
- 33 3. Develop strategies, procedures, and policies to meet or exceed identified state and
- 34 federal performance standards in alignment with state goals and objectives.

## 35 **B. Measurable Performance Outcomes**

- 36 1. Verification that CLEOs, Board Chairs, LWDB members, and career center staff are
- 37 provided with information on CareerSource Florida's policies and strategies, on
- 38 funding provided to the LWDB, and on requirements and consequences associated
- 39 with LWDB performance expectations.
- 40 2. Verification that staff and career centers are provided information and training
- 41 applicable to their job duties, including federal and state guidance and state workforce
- 42 policies.
- 43 3. LWDBs shall implement clear processes to locally monitor and ensure proper use
- 44 and expenditure of funds in alignment with state guidance.
- 45 4. LWDB staff shall identify needs, implement training, and attend policy-related training
- 46 conducted by CareerSource Florida and/or FloridaCommerce as necessary.
- 47 5. LWDBs shall develop and implement policies, procedures, and strategies to meet
- 48 performance expectations to avoid potential sanctions.

## 49 **III. POLICY AND PROCEDURES**

50 The CareerSource Florida Board of Directors seeks to ensure all LWDBs maintain credibility  
51 and accountability for meeting performance, programmatic, and financial requirements. CLEOs  
52 and LWDBs receive quarterly updates and annual notifications on whether they meet federal  
53 performance accountability measures and state-issued letter grades. Any LWDB not meeting  
54 the regulatory or statutory standards shall be subject to specific conditions and sanctions consistent  
55 with applicable federal laws, regulations, and guidance.

### 56 **A. Deficiencies<sup>2</sup>**

57 In the following circumstances, corrective actions may be imposed on LWDBs:

- 58 1. Failure by the LWDB to execute a Grantee-Subgrantee Agreement between
- 59 FloridaCommerce and the LWDB within the timeframe prescribed by
- 60 FloridaCommerce.
- 61 2. Failure by the LWDB's board members, staff, fiscal agent, or administrative entity
- 62 to appropriately oversee the delivery of services and ensure the effective and
- 63 efficient use of funds.
- 64 3. Failure to:
  - 65 a. Carry out the required functions of a LWDB as set forth in WIOA sec. 107(d).
  - 66 b. Achieve certification.
  - 67 c. Sustain program and fiscal integrity.
  - 68 d. Properly use federal or state funds resulting in disallowed costs.
  - 69 e. Act in a manner necessary to prevent waste, fraud, or abuse of federal or state
  - 70 funds.
  - 71 f. Submit timely and accurate required financial and performance reports, including
  - 72 annual Single Audits or financial statement audits.
  - 73 g. Meet the agreed-upon ITA expenditure requirement under section 445.003(3),
  - 74 Florida Statutes.

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75 <sup>2</sup> [20 CFR 677.220](#)

- h. Take corrective actions to resolve findings of non-compliance identified during programmatic, fiscal, or investigative monitoring or audit reviews conducted by the USDOL, FloridaCommerce, or other legally authorized entity.
- i. Resolve or address performance improvement plans, notices of deficiencies, or corrective action requirements within the timeframe determined by the authorized monitoring or reviewing authority.
- j. Resolve or address all independent audit findings or questioned costs.
- k. Comply with administrative and service contract requirements.
- l. Retain and produce required service delivery, program participant, and/or financial records.
- m. Address and resolve reported threats to health and safety of program participants or staff, which may include investigating complaints, taking appropriate corrective actions, or making referrals to the appropriate authorities.
- n. Meet other identified performance requirements, including:
  - i. Performance data demonstrating a failure to maintain or improve in actual performance outcomes for two or more years among enrolled individuals within subgroup populations, such as veterans and individuals receiving public assistance.<sup>3</sup>
  - ii. Two or more years of failing to meet adjusted local levels of performance consistent with WIOA sec. 116 and TEGL 11-19, Change 2,<sup>4</sup> or
  - iii. Two consecutive years with an annual letter grade of F.<sup>5</sup>

**B. Actions**

The CareerSource Florida Board of Directors and FloridaCommerce may impose the following actions in response to deficiencies noted in Section A, above:

1. **Specific Conditions** – Failure by the LWDB to fully resolve the deficiencies stated in the corrective notice may result in:
  - a. Placing the LWDB on cost-reimbursement status.
  - b. Requiring invoices and supporting documentation to be submitted to justify and support expenditures prior to approving future draw requests.
  - c. Establishing additional prior approval as deemed necessary by FloridaCommerce.
  - d. Any additional action that the Governor, CareerSource Florida Board of Directors, or FloridaCommerce may determine as effective or necessary to correct the deficiency.
  - e. Full fiscal review of expenditures related to funds passed to the LWDB through FloridaCommerce.
  - f. Full programmatic review of participant eligibility and compliance with federal and state laws, regulations, and guidance.
  - g. The requirement of an LWDB to perform the required corrective action.
  - h. Recapture and reallocation of funds.
2. **Turnaround Plan:** 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 on required adjusted local levels of performance and two consecutive state-issued LWDB annual Letter Grades, including data isolated for a single

<sup>3</sup> When evaluating subgroup performance, cohort size will be taken into consideration to ensure statistical validity and fairness in the assessment process.

<sup>4</sup> [Training and Employment Guidance Letter No. 11-19, Change 2](#)

<sup>5</sup> Letter grade methodology described at <https://analytics.careersourceflorida.com/LetterGrades/Methodology>

131 subgroup, to include veterans and individuals receiving public assistance, will be  
132 required to submit an LWDB Turnaround Plan to the SWDB for review and approval.  
133 For the purposes of this section, poor letter grade performance is defined as two  
134 consecutive letter grades of D or a single year with an F. An LWDB that fails to submit  
135 a timely Turnaround Plan or completes a Turnaround Plan cycle and does not improve  
136 to a grade of “C” or higher is subject to corrective action, including, but not limited to,  
137 removal of board members and executive directors under s. 445.007(2)(b) and  
138 possible board decertification under WIOA s. 107(c)(3).

- 139 a. LWDB Turnaround Requirements: After notification, the LWDB will have 6 months  
140 to develop and submit this plan, which must be data-based and designed to create  
141 the conditions to improve the LWDB’s performance during a two-year  
142 implementation period. FloridaCommerce shall apply intensive monitoring until the  
143 plan’s closure. Requirements for LWDB Turnaround include:  
144 i. The removal of the current LWDB Chair.  
145 ii. The results of a review of the performance of the executive director  
146 and/or the designated person responsible for operational and  
147 administrative functions of the board and a plan based on that review  
148 for the improvement of leadership performance designed to support  
149 LWDB improvement in administrative function of the board.  
150 b. The development of a professional development plan that provides ongoing,  
151 targeted support to increased performance by staff and leaders.  
152 c. The results from a review of practices in hiring, recruitment, retention, and  
153 reassignment of staff supporting the identified population and the associated  
154 actions identified for improvements in this area.  
155 d. A description of local, data-based monitoring efforts, aligned to SWDB standards,  
156 that will be enacted to support improvement in the identified area(s).  
157 e. A description of the review and update of any applicable local policies or operating  
158 procedures and how these will be updated to improve alignment and performance  
159 with the identified subgroup, if applicable; and  
160 f. A description of how plan implementation will be documented and tracked.

161  
162 3. **Notice** – FloridaCommerce will at a minimum provide notice to the CLEO, the  
163 executive director, board chair, and/or the designated person responsible for  
164 operational and administrative functions of the board of the need for a Turnaround  
165 Plan or corrective action to secure prompt compliance. The notice may include  
166 additional performance, programmatic, or financial reviews, or additional technical  
167 assistance activities. The notice will include a timeline for required implementation and  
168 provide the opportunity for the LWDB to resolve any deficiencies.

- 169  
170 4. **Sanctions** – Failure by the LWDB to fully resolve the deficiencies stated in the  
171 corrective notice or failure to fulfill the specific conditions placed on the LWDB may  
172 result in:  
173  
174 a. Disallowing all or part of the cost or activity determined to be non-compliant.  
175 b. Temporarily withholding reimbursement.  
176 c. Reduce infrastructure funding allotment.  
177 d. Reduction or otherwise adjustment of the LWDB’s funding (by disqualification  
178 from distributions of incentive monies, reallocated formula funding, and/or state-  
179 level reserve funds).  
180 e. Suspension or termination, in whole or in part, of the federal or state award.  
181 f. Issuance of a notice of intent to revoke approval of all or part of the local plan  
182 affected.  
183 g. Imposing a reorganization plan which may include:  
184 i. Decertifying the LWDB and requiring that a new board be appointed

- 185 and certified for the local area.
- 186 ii. Prohibiting the use of eligible providers and one-stop partners.
- 187 iii. Selecting an alternative entity as defined in WIOA Section 107 to
- 188 administer the program for the local area involved.
- 189 iv. Merging the local area into one or more other local areas, after
- 190 consultation with CLEO(s) in the local areas; or
- 191 v. Making such other changes necessary to secure compliance.
- 192
- 193 h. Initiation of suspension or debarment proceedings.
- 194 i. Any other penalty or action deemed appropriate by the Governor, CareerSource
- 195 Florida Board of Directors, or FloridaCommerce.
- 196
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### C. Appeal Processes

198 A local area that has been found in substantial violation of WIOA and has received

199 notification that either all or part of the local plan will be revoked or that a reorganization

200 will occur may appeal such sanctions to the Secretary of Labor, USDOL under [20 CFR](#)

201 [683.650](#). The appeal must be filed no later than 30 days after receipt of written

202 notification of the revoked plan or imposed reorganization. A copy of the appeal must be

203 simultaneously provided to the CareerSource Florida Board of Directors and the

204 Governor. The sanctions do not become effective until the time for appeal has expired

205 or USDOL has issued a decision. USDOL will notify the Governor and the appellant in

206 writing of the Secretary's decision within 45 days after receipt of the appeal.

207

208 A local area that has failed to meet local performance indicators for three consecutive

209 program years and has received the Governor's notice of intent to impose a reorganization

210 plan may appeal to the Governor to rescind or revise such plan no later than 30 days after

211 receiving written notice of the reorganization plan. The Governor must make a final

212 decision within 30 days after receiving the appeal. The local area may appeal the final

213 decision of the Governor to USDOL under [20 CFR 677.225](#) no later than 30 days after

214 receiving the Governor's final decision. Any appeal of the Governor's final decision must

215 be appealed jointly by the LWDB and the Chief Elected Official. USDOL will make its

216 final decision within 30 days after receipt of the appeal. The decision by the Governor on

217 the appeal becomes effective at the time it is issued and remains effective unless USDOL

218 rescinds or revises the reorganization plan.

219

## IV. IMPLEMENTATION

220 LWDBs must establish and maintain Local Operating Procedures (LOPs) that ensure all staff

221 understand performance accountability requirements, including those outlined in [TEGL No. 11-](#)

222 [19, Change 2, 20 CFR 677.220, and 20 CFR 683.720](#). LOPs should outline the processes the

223 LWDB uses to collect, validate, and report performance data; monitor internal program quality;

224 implement corrective actions at the staff and provider level; and ensure timely resolution of

225 findings identified through local or state monitoring. These procedures should focus on

226 strengthening internal controls, supporting continuous improvement, and promoting program

227 integrity. LOPs should be data-informed, aligned with state and federal standards, and reviewed

228 regularly to ensure responsiveness to evolving compliance and reporting requirements.

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232 Implementation of this policy requires LWDBs to integrate local policies and procedures that

233 proactively address potential deficiencies and support timely corrective actions. LWDBs must

234 document and track all efforts to meet performance expectations, including training, monitoring,

235 and leadership development activities.

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237 FloridaCommerce, in consultation with CareerSource Florida, will monitor LWDB compliance

238 through intensive reviews, fiscal and programmatic audits, and evaluation of LOPs. This

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oversight ensures that LWDBs maintain accountability and transparency while working toward continuous improvement and alignment with state workforce goals.

 <b>Workforce Policy</b>		<b>POLICY NUMBER</b>  <b>G105</b>
<b>Title:</b>	Composition and Certification of Local Workforce Development Boards; Certification of One-Stop Systems; and Direct Service Provider Designation	
<b>Policy Type:</b>	Governance	
<b>Program:</b>	Workforce Innovation and Opportunity Act	
<b>Effective:</b>		<b>Revised:</b>

## 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,<sup>1</sup> 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.

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

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30 **B. Measurable Performance Outcomes**  
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- 32 1. 100% of qualifying LWDBs are certified every two years and meet required LWDB  
33 board composition requirements.  
34 2. 100% of qualifying One-Stop Delivery Systems are certified every three years.  
35 3. LWDBs serving as direct providers of workforce services meet requirements to be  
36 approved and designated as such.  
37

38 **III. POLICIES AND PROCEDURES**  
39

40 **A. Local Workforce Development Board Composition**  
41

42 The Chief Local Elected Official (CLEO) must select members of the LWDB, consistent  
43 with the criteria in federal and state law and criteria set by the Governor. The membership  
44 of a LWDB must be consistent with WIOA section 107(b). LWDB appointees must not be  
45 current members of the local area's Education and Industry Consortium as defined by  
46 CareerSource Florida's Workforce Policy. Business representatives appointed to the  
47 LWDB shall include the industry sectors of focus identified in the local area WIOA plan.  
48 LWDBs should include representation on their boards from businesses in all counties  
49 within the local area. LWDBs must make public a current and updated list of their LWDB  
50 members on their website and submit a form demonstrating compliance with federal and  
51 state requirements<sup>2</sup> as part of the LWDB Certification process.  
52

53 LWDB members who no longer hold the position or status that made them eligible  
54 appointees must resign or be removed by the CLEO. LWDB vacancies must be filled  
55 within a reasonable amount of time, but no more than 12 months from the vacancy  
56 occurrence. This process must be described as part of the local plan.  
57

58 CLEOs are responsible for providing leadership to LWDBs and ensuring not only fiscal  
59 and programmatic compliance, but also performance. Consistent with this, a CLEO may  
60 remove members of a LWDB, its executive director and/or the designated person  
61 responsible for operational and administrative functions of the board for cause. As set  
62 forth in section 445.002(2), F.S., "for cause" includes lack of performance. Lack of  
63 performance includes, but is not limited to, the following:  
64

- 65 1. Nonperformance, as more fully set forth in Section III.B. For purposes of removal  
66 under this section, an LWDB is determined to have not met the standard if its  
67 performance is below 90 percent of the negotiated standard for each performance  
68 indicator.  
69 2. Consistent failure to perform on LWDB Letter Grades, the state identified measure  
70 of performance, including letter grade performance in identified subgroup  
71 populations.  
72 a. CareerSource Florida and FloridaCommerce will examine LWDB performance  
73 on each of the criteria developed under s. 14.36(3)(h) for various populations  
74 served, including, but not limited to, veterans, individuals on public assistance  
75 as defined in s. 414.0252(10), and businesses. LWDBs consistently  
76 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

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

77 submit a LWDB Turnaround Plan, consistent with Workforce Policy G104:  
78 Sanctions and Other Required Corrective Action for LWDBs Who Fail to Meet  
79 Federal and State Standards.

## 81 **B. Local Workforce Development Board Certification and Decertification**

82  
83 LWDBs must be certified every two years. FloridaCommerce provides guidance to  
84 complete this process. LWDBs submit requests for certification using standardized forms  
85 provided by FloridaCommerce and CareerSource Florida.

86  
87 CareerSource Florida and FloridaCommerce review submitted documents for completion  
88 and compliance with all state laws and federal regulations, using the approved and posted  
89 versions of the **LWDB Composition Tool and the Evaluation for LWDB Certification**  
90 **Form** to make approval recommendations to the SWDB based on information provided.  
91 Conditional approval for certification may be granted for LWDBs seeking certification that  
92 require additional time to meet criteria not associated with performance. LWDBs not  
93 meeting requirements outlined in the **Evaluation for LWDB Certification Form** may not  
94 be recommended for full approval.

95  
96 Obtaining LWDB certification indicates that an LWDB meets minimum requirements to  
97 perform critical duties that support the workforce system in a designated local area. The  
98 SWDB may take action when the performance or activities of an LWDB do not meet  
99 requirements outlined in state board policies or state or federal law. This action can  
100 include LWDB decertification.

101  
102 LWDBs who exhibit the following deficiencies cannot be fully certified and may be  
103 decertified, after the provision of notice and 30-day comment period, by the SWDB:<sup>3</sup>

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

118  
119 Additional criteria for LWDB decertification include those listed below:

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

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<sup>3</sup> [WIOA Section 107\(c\)\(3\)](#).

<sup>4</sup> TEGL 11-19 Change 2 | U.S. Department of Labor

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- 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.<sup>5</sup>

**C. Certification of the Local One-Stop Delivery System**

Every three years, each local One-Stop Delivery System must be certified.<sup>6</sup> 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.<sup>7</sup> 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.<sup>8</sup>

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*.

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<sup>5</sup> WIOA Section 107(c)(3)(C).  
<sup>6</sup> WIOA Section 121(g).  
<sup>7</sup> 20 CFR 679.410(b) and WIOA Section 107(g).  
<sup>8</sup> [Section 445.007\(6\), Florida Statutes.](#)

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

173  
174 A LWDB designated as a direct provider of career services must submit a performance  
175 report at the end of each program year during which direct workforce services were  
176 provided. The report must contain, at a minimum, the following:

- 177
- 178 1. An analysis of cost savings as a result of the LWDB providing direct workforce
- 179 services.
- 180 2. A description of improvement in performance outcomes.
- 181 3. A description of any “best practices” to be shared with other LWDBs.
- 182 4. Evidence that the direct service provision was incorporated into the local WIOA
- 183 plan within 60 days of receipt of approval to serve as a direct provider of workforce
- 184 services.
- 185

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

189  
190 The designation as a direct provider of workforce services may not exceed the duration  
191 of the local WIOA plan and may be renewed through the submission of a new request,  
192 not to exceed the durations of such subsequent plans. The approval to serve as a direct  
193 provider of workforce services can be revoked by the SWDB if determined that it is no  
194 longer necessary or for persistent failure to meet associated performance measurements.

#### 195 **IV. IMPLEMENTATION**

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197  
198 LWDBs are responsible for conducting annual internal reviews of their governance and  
199 service delivery systems, incorporating customer feedback, staff training metrics, and  
200 accessibility assessments. LWDBs must update certification criteria, in alignment with SWDB  
201 identified criteria, every two years and include them in the WIOA local plan as required under  
202 WIOA Section 108 and [20 CFR 679.560](#).

203  
204 FloridaCommerce will monitor LWDBs and their LOPs annually in consultation with  
205 CareerSource Florida to ensure compliance with federal and state requirements.  
206 FloridaCommerce and CareerSource Florida will address any deficiencies through the state’s  
207 resolution process and consistent with applicable CareerSource Florida policies. These  
208 efforts promote continuous improvement, accountability, and consistent quality across  
209 Florida’s workforce development system.

210  
211 Boards that do not meet the requirements outlined in this policy, or that exhibit deficiencies  
212 as described in CareerSource Florida Policy G104 – Sanctions and Other Required  
213 Corrective Action for Local Workforce Development Boards Who Fail to Meet Federal and  
214 State Standards, may be subject to corrective actions. These may include, but are not limited  
215 to:

- 216
- 217 1. Issuance of a Corrective Notice
- 218 2. Imposition of Specific Conditions, including a required Turnaround Plan
- 219 3. Application of Sanctions, which may include:

- 220 a. Decertifying the LWDB.  
221 b. Selecting an alternative entity as defined in WIOA Section 108 to administer the  
222 program for the local area.  
223 c. Merging the local area into one or more other local areas, after consultation with the  
224 CLEO.  
225 d. Making other necessary changes to secure compliance.  
226

227 FloridaCommerce provides technical assistance and support to LWDBs before initiating  
228 corrective actions or sanctions. This assistance may include guidance on corrective action  
229 planning, clarification of certification criteria, technical resources, and identification of best  
230 practices. The goal is to promote continuous improvement and ensure boards have a fair  
231 opportunity to meet federal and state standards before formal sanctions are considered.  
232

233 **V. ATTACHMENTS AND RESOURCES**

234 Evaluation for LWDB Certification Form

235 Evaluation for One-Stop Certification Form

236 Evaluation for LWDB Direct Service Provider Designation Form

237 One-Stop Delivery System Standardized Certification Template  
238  
239  
240  
241

## Evaluation For LWDB Certification Form

This form is utilized by CareerSource Florida and FloridaCommerce to review the submission of Local Workforce Development Boards (LWDBs) seeking LWDB certification or re-certification in compliance with all state laws and federal regulations and provide a recommendation to the State Workforce Development Board for consideration and approval, if appropriate. All items below must be identified as 'met' for a LWDB to be certified.

1. **If an existing LWDB, indicate here:** Choose an item.
2. **Indicate counties served by this LWDB:**

Requirement	Citation (State)	Citation (Federal)	Met/ Not Met	Notes
1. <b>BOARD COMPOSITION:</b> There is a valid and submitted LWDB Board Composition Tool that indicates board appointments and composition are in accordance with federal and state law,	s. 445.007, F.S.	20 CFR 679.320, 20 CFR 679.340, 20 CFR 679.350	Choose an item.	
2. <b>PERFORMANCE:</b> There is documentation that the board negotiated local performance indicators and ensured compliance that assisted in the meeting or exceeding of all negotiated and adjusted targets identified through federal and state required performance accountability measures. To include the following applicable measures for each program: a) Employment b) Wage c) Training, and d) Employer Satisfaction	s. 445.007, F.S.	20 CFR 679.370	Choose an item.	
3. <b>SERVICE PROVISION:</b> There is documentation that the board appropriately and effectively a. Provided for the designated all local service providers. b. Developed and implemented strategies for meeting the skill needs of employers c. Led efforts to develop and implement career pathways in partnership with business and education partners.	s. 445.007(6). F.S.	20 CFR 679.370		
4. <b>FISCAL INTEGRITY:</b> There is documentation that the board manages funds responsibly and maintains fiscal integrity and transparency. Including: a. The timely submission of budgets for review	s. 445.007 (12),	20 CFR 679.370		

<ul style="list-style-type: none"> <li>b. The publishing of its most recent IRS Form 990 and all required contracts</li> <li>c. The submission of required compensation disclosures</li> <li>d. The submission of required infrastructure funding agreements</li> <li>e. The submission of documentation demonstrating that LWDB workforce investment activities are aligned the needs of local employers and support local economic growth</li> </ul>				
<p>5. <b>MONITORING:</b> There is documentation that the board conducted oversight of local programs and services and required activities. This documentation included:</p> <ul style="list-style-type: none"> <li>a) annual self-assessments to evaluate compliance with certification criteria, including board composition, service delivery, and accessibility,</li> <li>b) internal monitoring results, including any corrective actions taken,</li> <li>c) Local Operating Procedures (LOPs) and Local Policies are in alignment with State Workforce Policies</li> <li>d) Any required or executed Memorandum(s) of Understanding</li> <li>e) Those related to the certification of one-stop centers,</li> </ul>	s. 445.007, F.S.	20 CFR 679.310, 20 CFR 679.370	Choose an item.	
<p>6. <b>PARTNERSHIP:</b> There is documentation that the board actively and effectively partnered and coordinated with</p> <ul style="list-style-type: none"> <li>a. economic development organization,</li> <li>b. public and private educational entities,</li> <li>c. local businesses,</li> <li>d. community organizations, and</li> <li>e. required WIOA partners.</li> </ul>	s. 445.007, F.S.	20 CFR 679.370	Choose an item.	
<p>7. <b>COMPLIANCE:</b> There is documentation that the board ensured compliance with</p> <ul style="list-style-type: none"> <li>a. transparency and public access to meetings and records requirements,</li> <li>b. the conflict-of-interest provisions,</li> <li>c. requirements specific to Education and Industry Consortiums</li> <li>d. the timely submission of a local plan in alignment with the State Plan.</li> </ul>	ss. 445.007(1), (14), and (15), F.S.	20 CFR 679.310, 20 CFR 679.370, 20 CFR 679.390, 20 CFR 679.430	Choose an item.	
<p><b>Workforce Research and Regional Labor Market Analysis:</b> There is evidence of workforce</p>		20 CFR 679.370	Choose an item.	

research and regional labor market analysis consistent with federal requirements.				
Other Considerations:			Choose an item.	

# LWDB Direct Service Provider Waiver Request - Evaluation Form

This form is utilized by CareerSource Florida and FloridaCommerce to review the submission of Local Workforce Development Boards (LWDBs) seeking to serve as a direct service provider in compliance with all state laws and federal regulations and to provide a recommendation to the State Workforce Development Board for consideration and approval, if appropriate. All applicable items below must be identified as 'met' for a LWDB to be presented to the State Board for approval of a waiver and designation as a direct provider of workforce services.

1. **LWDB:** Choose an item.
2. Choose an item. **Date Assessment Completed:** Click or tap to enter a date.

Requirement	Citation (State)	Citation (Federal)	Met/Not Met	Notes
<b>CLEO Agreement:</b> Documentation that the Chief Local Elected Official (CLEO) has agreed to the LWDB serving as a direct provider of career services.	s. 445.007(6), F.S.	WIOA §107(g)(2); <a href="#">20 CFR 679.410(b)</a>		Submission of documents by LWDB required.
<b>Firewall Implementation:</b> Description of protective measures to ensure the transparency, integrity, proper oversight and management of internal processes. To establish a firewall separating the LWDBs oversight role from its service provider role.	s. 445.007(6), F.S.	<a href="#">20 CFR 679.430</a>		Submission of documents by LWDB required.
<b>Cost Analysis:</b> Estimated cost of services and documentation of expected cost savings from direct provision.	s. 445.007(6), F.S.			Submission of documents by LWDB required.
<b>Performance Improvement:</b> Description of anticipated improvements to service delivery and performance outcomes.	s. 445.007(6), F.S.			Submission of documents by LWDB required.
<b>Grant Program Identification:</b> Identification of grant programs funding the direct service activities.	s. 445.007(6), F.S.			Submission of documents by LWDB required.
<b>Oversight and Monitoring:</b> Internal controls and procedures (including LOPs) for oversight and evaluation of LWDB performance as a direct provider.	s. 445.007(6), F.S.	<a href="#">20 CFR 679.430</a>		Submission of documents by LWDB required.

## Evaluation for One-Stop Certification

This form is utilized by CareerSource Florida and FloridaCommerce to review the submission of Local Workforce Development Boards (LWDBs) seeking to serve as a One-Stop Operator in compliance with all state laws and federal regulations and provide a recommendation to the State Workforce Development Board for consideration and approval, if appropriate. This form also contains minimum criteria, including those assessing the system’s effectiveness, accessibility, and commitment to continuous improvement, that LWDBs must use in the selection of each local One-Stop Delivery Operator.

### Identifying Information

1. **Please select how the LWDB was selected as the one-stop operator using the dropdown below.**  
Choose an item.
2. **LWDB:** Choose an item.
3. **Date Assessment Completed:** Click or tap to enter a date.
4. **Current Certification Level:** Choose an item.
5. **Certification Level Requested:** Choose an item.

### Section A: Effectiveness Criteria<sup>1</sup>

Requirement	Citation (State)	Citation (Federal)	Met/ Not Met	Notes
<b>Procurement:</b> Documentation was provided that sole source procurement <sup>2</sup> or successful competition <sup>3</sup> was completed in alignment with state and federal law.	ss. 445.007(6) and (9); s. 445.009, F.S.	20 CFR 679.410(a)(1)		Submission of documents required by LWDB.
<b>Approval:</b> Documentation of approval of chief elected officer was provided.	ss. 445.007(6) and 445.009	20 CFR 679.410(a)(2)		Submission of documents required by LWDB.
<b>Performance:</b> Evidence was submitted indicating the LWDB met or exceeded negotiated levels of performance for federal indicators of performance.	ss. 445.007(6) and 445.009	20 CFR 678.800(c)		Assessed via internal review – no LWDB submissions required.
<b>Performance Monitoring:</b> Evidence was submitted indicated there is a regular process for local performance monitoring that includes: <ul style="list-style-type: none"> <li>• The identification and provision of aligned and approved technical assistance designed to support performance improvement;</li> <li>• Customer feedback in alignment with Workforce Policy P9, Availability of Services to Floridians, for both jobseekers and businesses; and</li> </ul>	ss. 445.007(6) and 445.009	20 CFR 678.800(c)		Submission of documents required by LWDB.

<sup>1</sup> s. 445.007(6), Fla. Stat.

<sup>2</sup> [20 CFR 679.410\(a\)\(1\)\(i\)](#)

<sup>3</sup> [20 CFR 679.410\(a\)\(1\)\(ii\)](#)

<ul style="list-style-type: none"> <li>The implementation of a regular system of professional development and skills training in alignment with Workforce Policy O92, Staff Training and Credentialing Skill Standards.</li> </ul>				
<p><b>Programmatic Effectiveness:</b> Documentation was provided that demonstrates how well the one-stop system integrates available services for participants and businesses and meets the workforce development needs of participants and the employment needs of local employers, including:</p> <ul style="list-style-type: none"> <li>Local labor force participation rates at or below the state average;</li> <li>Regular collaboration with local economic development organizations and local businesses that includes regular meetings and partnerships (OJT contracts, training initiatives, etc.) that align with identified local sectors of strategic focus, identified emerging trends, or other needs identified through the use of labor market data;</li> <li>How access to partner programs is provided to the maximum extent possible, including the provision of services outside of regular business hours as the need is identified by LWDBs and with the feedback of one-stop customers; and</li> <li>Compliance with relevant state workforce policies, state and federal law, and agency technical assistance is locally monitored.</li> </ul>	ss. 445.007(6) and 445.009	20 CFR 678.800(b)		Submission of documents may be required by LWDB if a review of available information is not sufficient.
<p><b>Programmatic Compliance:</b> Documentation is provided that programmatic compliance is achieved, including:</p> <ul style="list-style-type: none"> <li>All state and federally required services, including core services, are made available to Floridians consistent with the law, including electronically available services;</li> <li>All required memorandums of understanding with mandatory or optional partners participating in the one-stop delivery system have been executed;</li> <li>Submission of required information for employees of FloridaCommerce who deliver employment services; and</li> <li>Individual Training Accounts have been expended on programs aligned with labor market needs of the local area and the system utilizes locally leveraged resources from other parts of the workforce system.</li> <li>Requirements specific to Education and Industry Consortium, consistent with section 445.007(15), Florida Statutes, have been met.</li> </ul>	ss. 445.007 and 445.009, F.S.	20 CFR 678.800(b)		Submission of documents may be required by LWDB if a review of available information is not sufficient.
<p><b>Fiscal Effectiveness:</b> Documentation is provided that describes how well the center(s) operated in a cost-efficient manner. This must include:</p>	s. 445.009	20 CFR 678.800(b)		Submission of documents may be

<ul style="list-style-type: none"> <li>• Documentation related to indirect cost agreement(s); and</li> <li>• That at least 90% of Wagner-Peyser funding is going into direct customer service costs;</li> <li>• The implementation of a regular system of fiscal monitoring to identify and improve fiscal compliance and performance.</li> </ul>				required by LWDB if a review of available information is not sufficient.
<p><b>Accessibility Compliance:</b> Documentation was provided that centers meet accessibility requirements consistent with state and federal law, including the following:</p> <ul style="list-style-type: none"> <li>• Compliance with ADA and disability-related regulations implementing WIOA sec. 188, set forth at <a href="#">29 CFR Part 38</a>. This includes how the physical accessibility of one stop centers will be ensured.</li> <li>• Provision of reasonable accommodation, auxiliary aids, services, and assistive technology.</li> <li>• Provision of reasonable modifications to policies, practices, or procedures where necessary.</li> <li>• The administering of programs that encourage participation.</li> <li>• Policies and practices are designed to communicate effectively with all potential customers, including those with disabilities.</li> </ul>		20 CFR 678.800(b)		Submission of documents required by LWDB.

## Section H: Signatures Documenting Review and Approval by the LWDB or FloridaCommerce

\*The application of a LWDB seeking to serve as a one-stop operator must include a signature of the chief elected official in the local area demonstrating approval.

Signature \_\_\_\_\_

Printed Name \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_

Organization \_\_\_\_\_

**LWDB Composition List Tool**

Program Year (PY) - To be Completed by the LWDB

Name of	Date Completed:	Term of Appo	Appointment Date	LWDB: Name of Member's Business, Company, or Employer and Title	REPRESENTATION CATEGORY	REPRESENTATION Primary	REPRESENTATION Secondary (Optional)
Complete the Board of Directors template below. Include current board members at the time this document is completed including vacant seats, if applicable. In the Representation columns, 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 H. Reminder that at least 20% of members must be representatives from workforce and over 50% are required to be from businesses in the local area. Please note: <i>Providing a reference to website will not satisfy this request.</i>							
	Ex. Member, Chair, Secretary etc.	Ex. MM/DD/YY-MM/DD/YY	Ex. MM/DD/YY				

LWDB Composition Requirements - be completed by Florida Commerce or SWDB Staff.	To	SCORE
<b>Business Representative Criteria</b>		
Percentage members from business in the local area		
COUNT of members from small business as defined by the U.S. Small Business Administration.		
<b>Workforce Representative Criteria</b>		
Percentage of the members who are workforce representatives.		
COUNT of representatives of labor organizations		
COUNT of representatives of a joint labor-management, or union affiliated, registered apprenticeship program within the area who must be a training director or a member of a labor organization.		
<b>Additional Requirements</b>		
COUNT of eligible training provider administering adult education and literacy activities under WIOA title II		
COUNT of public education or training provider is represented		
COUNT of private education or training provider is represented		
COUNT of representatives from an institution of higher education providing workforce investment activities, including community colleges		
COUNT of representative from economic and community development entities		
COUNT of representative from the State Employment Service office under the Wagner-Peyser Act (29 U.S.C. 49 et seq.) serving the local area		
COUNT of representatives from programs carried out under title I of the Rehabilitation Act of 1973, other than sec. 112 or part C of that title		
<b>MAY include</b>		
COUNT of representatives of community-based organizations that have demonstrated experience and expertise in addressing the employment, training or education needs of individuals with barriers to employment, including organizations that serve veterans or provide or support competitive integrated employment for individuals with disabilities		
Count of representatives of organizations that have demonstrated experience and expertise in addressing the employment, training, or education needs of eligible youth, including representatives of organizations that serve out-of-school youth		
Count of representatives of entities administering education and training activities who represent local educational agencies or community-based organizations with demonstrated expertise in addressing the education or training needs for individuals with barriers to employment		
Count of governmental and economic and community development entities who represent transportation, housing, and public assistance programs		
Count of representatives from philanthropic organizations serving the local area		
Count of representatives of other appropriate individuals as determined by the chief elected official		

REQUIRED ELEMENT	OPTIONAL ELEMENT
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<b>LWDB Composition Requirements</b>	<b>CFR</b>	<b>FL Statute</b>
<b>Business Representative Criteria</b>		
A majority of the members of the Local WDB must be representatives of business in the local area	20 CFR 679.320(b)	
At a minimum, two members must represent small business as defined by the U.S. Small Business Administration.	20 CFR 679.320(b)	
<b>Workforce Representative Criteria</b>		
At least 20 percent of the members of the Local WDB must be workforce representatives.	20 CFR 679.320(c)	
MUST include two or more representatives of labor organizations, where such organizations exist in the local area.	20 CFR 679.320(c)(1)	
MUST one or more representatives of a joint labor-management, or union affiliated, registered apprenticeship program within the area who must be a training director or a member of a labor organization.	20 CFR 679.320(c)(2)	


<b>Additional Requirements</b>		
MUST include at least one eligible training provider administering adult education and literacy activities under WIOA title II	20 CFR 679.320(d)(1)	
If a public education or training provider is represented on the local board, a representative of a private education provider must also be appointed to the local board. (Unless waived by the SWDB)		s. 445.007 (1), F.S.
MUST include at least one representative from an institution of higher education providing workforce investment activities, including community colleges;	20 CFR 679.320(d)(2)	
If a public education or training provider is represented on the local board, a representative of a private education provider must also be appointed to the local board. (Unless waived by the SWDB)		s. 445.007 (1), F.S.
MUST include at least one representative from economic and community development entities	20 CFR 679.320(d)(3)(i) )	
MUST include at least one representative from the State Employment Service office under the Wagner-Peyser Act (29 U.S.C. 49 et seq.) serving the local area	20 CFR 679.320(d)(3)(i) i)	

MUST include at least one representative from programs carried out under title I of the Rehabilitation Act of 1973, other than sec. 112 or part C of that title	20 CFR 679.320(d)(3)(i) ii)	
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<b>MAY include</b>		
one or more representatives of community-based organizations that have demonstrated experience and expertise in addressing the employment, training or education needs of individuals with barriers to employment, including organizations that serve veterans or provide or support competitive integrated employment for individuals with disabilities	20 CFR 679.320(c)(3)	
one or more representatives of organizations that have demonstrated experience and expertise in addressing the employment, training, or education needs of eligible youth, including representatives of organizations that serve out-of-school youth.	20 CFR 679.320(c)(4)	
Entities administering education and training activities who represent local educational agencies or community-based organizations with demonstrated expertise in addressing the education or training needs for individuals with barriers to employment	20 CFR 679.320(e)(1)	
Governmental and economic and community development entities who represent transportation, housing, and public assistance programs	20 CFR 679.320(e)(2)	
Philanthropic organizations serving the local area	20 CFR 679.320(e)(3)	
Other appropriate individuals as determined by the chief elected official	20 CFR 679.320(e)(4)	

<b>Representation Category</b>	<b>Representation DROPDOWN</b>
BUSINESS	REQUIRED: Small Business
WORKFORCE	REQUIRED: Business
EDUCATION & TRAINING PROVIDER	REQUIRED: Labor Organization
ECONOMIC DEVELOPMENT	REQUIRED: Joint labor-management, or union affiliated, registered apprenticeship program
COMMUNITY PARTNER	REQUIRED: Eligible training provider administering adult education and literacy activities (PUBLIC)
WIOA	REQUIRED: Eligible training provider administering adult education and literacy activities (PRIVATE)
OTHER	REQUIRED: Representative from an institution of higher education providing workforce investment activities (PUBLIC)
	REQUIRED: Representative from an institution of higher education providing workforce investment activities (PRIVATE)
	REQUIRED: A representative from an economic and community development entity
	REQUIRED: A representative from the State Employment Service office under the Wagner-Peyser Act
	REQUIRED: A representative from Vocational Rehabilitation or Blind Services
	OPTIONAL: A representative of a community-based organization with expertise in addressing the employment, training or education needs of individuals with barriers to employment, including organizations that serve veterans or provide or support competitive integrated employment for individuals with disabilities
	OPTIONAL: A representative of an organization addressing the employment, training, or education needs of eligible youth
	OPTIONAL: a representative of a local educational agency (school district) or community-based organization with demonstrated expertise in addressing the education or training needs for individuals with barriers to employment
	OPTIONAL: A representative of a governmental and economic and community development entity who represents transportation, housing, and public assistance programs
	OPTIONAL: A representative of a local philanthropic organizations
	OPTIONAL: OTHER

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 <b>Workforce Policy</b>		<b>POLICY NUMBER</b>  <b>O125</b>	
<b>Title:</b>	Business Engagement and Economic Development Support		
<b>Policy Type:</b>	Operational		
<b>Programs:</b>	Workforce Innovation and Opportunity Act & Wagner-Peyser		
<b>Effective:</b>	06/11/2019	<b>Revised:</b>	02/20/2025

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## I. PURPOSE AND SCOPE

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Florida’s workforce strategy is focused on delivering a high-performing workforce system that is flexible, results-driven, and always improving. Business services are a vital part of that strategy. Florida’s vision focuses on strengthening business engagement and delivering real value by identifying employer needs, coordinating services across partners, and building sector-based partnerships that support in-demand industries. Strong, responsive connections with businesses are essential to achieving this vision. Local Workforce Development Boards (LWDBs) and career centers work side-by-side with employers of all sizes to provide consistent, high-quality support that helps them find, train, and retain skilled workers, fueling local economies and driving job growth. FloridaCommerce and CareerSource Florida reinforce these efforts by encouraging alignment, reducing barriers to collaboration, and providing strategic and technical support. This policy establishes clear expectations for how LWDBs should engage employers, coordinate with regional partners, and align workforce services with regional needs to help communities attract, grow, and retain businesses.

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## II. KEY OBJECTIVES AND MEASURABLE PERFORMANCE OUTCOMES

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LWDBs should establish and develop effective relationships and networks with the business community. LWDBs develop and implement promising and proven strategies that provide the skilled workforce needed by local employers to expand employment and career advancement opportunities within in-demand industry sectors or occupations. LWDB services assist in driving regional economic development through strategic partnerships and data-driven decisions.<sup>1</sup>

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### A. Key Objectives

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1. **Enhance Employer Engagement:** Conduct proactive and responsive outreach and communication and develop tailored workforce strategies that align with business needs to build lasting partnerships.

<sup>1</sup> [20 CFR 679.370\(e\)\(4\)](#)

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- 2. **Expand Demand-Driven Training Programs:** Grow and promote training models like On-the-Job Training (OJT), Customized Training (CT), Incumbent Worker Training (IWT), and apprenticeships, as well as rapid-credential opportunities to support business growth, meet workforce demands in high-growth sectors, and improve employment outcomes through strategic collaboration and ongoing evaluation. Increase awareness and support of state-level training programs like Quick Response Training (QRT) grants.
- 3. **Advance Regional Economic Development:** Partner with local and regional economic development organizations (EDOs) to integrate workforce training into economic development activities.

**B. Measurable Performance Outcomes**

**1. Employer Engagement & Satisfaction**

- Total number of employers served.
- Effectiveness in Serving Employers.<sup>2</sup>

**2. Business Engagement**

- Number of businesses participating in work-based training.
- Number of Memorandums of Understanding (MOUs) executed in alignment with technical guidance.
- Business engagement metrics.<sup>3</sup>

**III. POLICIES AND PROCEDURES**

Business services help employers grow and connect individuals to jobs by aligning training with industry needs and preparing job seekers for in-demand roles. LWDBs and career centers 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.<sup>4</sup> 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 TEGL 21-22.<sup>5</sup> The 2021 REACH Act<sup>6</sup> further integrates education and workforce systems to meet labor market demands.

LWDBs should collaborate within all counties in their local workforce development areas 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,

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<sup>2</sup> WIOA Effectiveness in Serving Employers Performance Indicator; [TEN 24-23](#)  
<sup>3</sup> [EconoVue Business Engagement Success Metrics](#)  
<sup>4</sup> [20 CFR 679.370](#)  
<sup>5</sup> [Training and Employment Guidance Letter \(TEGL\) No. 21-22](#)  
<sup>6</sup> [Section 14.36, F.S.](#)

76 partnership and coordination metrics, service delivery metrics, and shared goals for strategic  
77 alignment to ensure alignment with regional economic growth strategies.

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79 **A. Strategic Coordination with Economic Development**

80 LWDBs are expected to foster strategic partnerships with regional and local businesses  
81 and EDOs by coordinating planning efforts, sharing labor market intelligence, and  
82 collaborating on initiatives that drive business growth and job creation. These  
83 partnerships ensure workforce strategies align with state workforce and economic  
84 goals, regional economic goals, and are supported through ongoing communication and  
85 data-informed decision-making.

86  
87 LWDBs must coordinate with regional and local economic development agencies to:

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1. Identify business recruitment or expansion opportunities.
  2. Align WIOA-funded training programs with targeted business needs.
  3. Offer work-based training options as part of available supports for employers.
  4. Increase awareness and provide timely support for businesses seeking state training program assistance like Quick Response Training (QRT) grants.
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95 Such coordination must be documented in local MOUs or formal partnership  
96 agreements in alignment with technical guidance. CareerSource Florida and  
97 FloridaCommerce will provide technical assistance, including a standardized MOU  
98 template, information about existing economic development partnerships, and training  
99 resources, as part of a statewide toolkit.

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101 **B. Business-Aligned Toolkit and Training Models**

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

- 109
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.
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117 LWDBs should utilize WIOA-funded training strategies, including those listed below, as  
118 allowable options for effective implementation:

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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
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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.

Training strategies must be provided consistently and made available to all businesses. Allowable training providers include state educational institutions, industry, or contracted providers of training, and may include credentials on the Eligible Provider Training List or the Master Credential List. Training providers should be identified with the input of business partners in alignment with issued technical assistance. All activities must comply with applicable federal and state requirements.

#### IV. IMPLEMENTATION

LWDBs are encouraged to use sector strategies, develop career pathways, and share innovative best practices across local workforce development areas and local workforce development regions.

Each LWDB must develop and maintain applicable Local Operating Procedures (LOPs). LOPs must be reviewed each year and updated as needed. A description of LWDB business strategies and local operating procedures must be described in WIOA local plans. LOPs should include employer outreach and candidate screening steps; training coordination; sector strategy actions and employer feedback methods; rules for using WIOA funds to support businesses; and documentation and tracking of employer commitments.

Florida Commerce, in consultation with CareerSource Florida, will provide technical guidance, including templates, and conduct annual reviews of LOPs and business service results as necessary.

#### V. ATTACHMENTS AND RESOURCES

[WorkforceGPS - Business Engagement Collaborative Community Homepage](#)

[Toolkit | Business Center | CareerOneStop](#)

[WorkforceGPS - What the Evidence Says About Employer Engagement Strategies](#)

[WorkforceGPS - Modernizing Business Services for Today's Employer](#)

[WorkforceGPS - Employer Engagement Webinar Series: Top 20 "Take Home Now" Strategies for Success](#)

[WorkforceGPS - Business Services: Effectively Engaging Employers, Utilizing Data, and Measuring Performance](#)



# Workforce Policy

**POLICY NUMBER**

**P74**

<b>Title:</b>	<u>State Individual Training Account Expenditure Requirements and Waiver Process</u>		
<b>Type:</b>	Programmatic		
<b>Program:</b>	Workforce Innovation and Opportunity Act		
<b>Effective:</b>	June 29, 2012	<b>Revised:</b>	TBD

## I. PURPOSE AND SCOPE

The Workforce Innovation and Opportunity Act (WIOA)<sup>1</sup> and Florida law<sup>2</sup> emphasize access to training that leads to credentials of value and employment. The state workforce development board's (SWDB) training strategy includes Individual Training Accounts (ITAs) to help individuals gain skills for in-demand jobs. Local Workforce Development Boards (LWDBs) must use at least 50% of their Title I WIOA Adult and Dislocated Worker funds each year on ITAs, other training services prescribed and authorized by WIOA, and services supporting employment through training unless granted a waiver by the SWDB. These funds must support training that helps jobseekers get jobs and helps businesses find skilled workers. LWDBs must plan how to use these funds in ways that match local job needs and support long-term success. LWDBs are expected to work with local and regional partners, businesses, and organizations that offer support services to ensure training leads to performance outcomes.

## II. KEY PROGRAM OBJECTIVES AND MEASURABLE PERFORMANCE OUTCOMES

### A. Key Program Objectives

1. Allocate a minimum of 50% of WIOA Adult and Dislocated Worker funds annually to state allowable Individual Training Accounts (ITAs) expenditures.<sup>3</sup>
2. Coordinate training expenditures with other funding sources and partner programs to expand training access, support co-enrollment, and reduce duplication of services.
3. Prioritize training programs that lead to recognized, stackable credentials aligned with in-demand occupations, career pathways, and regional sector strategies.
4. Monitor expenditures using the Subrecipient Enterprise Resource Application (SERA) and ensure compliance with state-defined sub-cost category reporting requirements.

<sup>1</sup> Workforce Innovation and Opportunity Act of 2014, [Public Law 113-128](#), Section 134(c)(3)

<sup>2</sup> Section 445.003(3)(a)1., F.S.

<sup>3</sup> **20 CFR 680.200**

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**B. Measurable Performance Outcomes**

- 1. Percentage of WIOA funds allocated to state allowable ITAs activities meets or exceeds the 50% requirement annually.
- 2. Number of participants enrolled in and completing training programs that result in attainment of credentials during a program year.
- 3. Compliance rate of LWDBs submitting training and training-related expenditures in SERA by sub-cost category.
- 4. Percentage of training participants who attain employment in in-demand occupations within two quarters after exit, consistent with meeting or exceeding WIOA Primary Indicators of Performance.

**III. POLICIES AND PROCEDURES**

WIOA funds may be used for training only when no other grant assistance is available or when WIOA support is needed in addition to aid like Federal Pell Grants under Title IV of the Higher Education Act of 1965. The cost of participant training must be coordinated with other funding sources as required in [Workforce Policy P122 – Adult and Dislocated Worker Program Eligibility](#). Veterans Affairs (VA) education and training benefits are not considered “other grant assistance” for WIOA eligibility. Tuition, books, fees, other WIOA-authorized training services, and services supporting employment through training count toward the 50% expenditure requirement.<sup>4</sup> The Allowable Programmatic Training and ITA Costs Crosswalk, developed by the Florida Department of Commerce (FloridaCommerce), guides LWDBs on qualifying expenses. FloridaCommerce requires LWDBs to report these expenditures in SERA using defined cost categories.

**A. ITA Expenditures**

An ITA is a payment agreement established on behalf of a participant with a training service provider from the State Eligible Training Provider List or ETPL.<sup>5</sup> LWDBs may not provide training services themselves<sup>6</sup> but may, under limited circumstances, use a contract instead of an ITA to provide training services.

**B. Sub-Cost Categories**

Other training services prescribed and authorized by WIOA and services supporting employment through training are identified in cost categories. These categories describe activities that are not paid through ITAs but are “other training services as prescribed by WIOA” for purposes of the state ITA expenditure requirement. The sub-cost categories for this expenditure requirement are outlined below.

**1. Occupational Skills Training**

Occupational skills training is a structured program that equips participants with specific job skills needed for entry, intermediate, or advanced roles in various fields. LWDBs should prioritize programs leading to recognized, high-value credentials, especially those on the Master Credentials List that align with in-demand or emerging local industries.

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<sup>4</sup> Section 445.003(3)(a)1., F.S.  
<sup>5</sup> [20 CFR Part 680 Subpart C](#)  
<sup>6</sup> Section 445.007(6), F.S.

77 **2. Other Allowable Training Expenditures**

78 Other allowable training services prescribed and authorized by WIOA but not purchased  
79 using an ITA can be counted to assist boards in meeting this requirement, including:

- 80
- 81 a. On-the-job training.
- 82 b. Registered apprenticeship programs not on the ETPL.
- 83 c. Programs that combine workplace training with related instruction and may include  
84 cooperative education programs.
- 85 d. Incumbent worker training.
- 86 e. Training programs operated by the private sector or provided by contracted providers.
- 87 f. Skill upgrading and retraining.
- 88 g. Entrepreneurial training.
- 89 h. Job readiness training in combination with other training activities.
- 90 i. Adult education and literacy activities provided concurrently or in combination with  
91 services provided in any of the above.
- 92 j. Customized training.
- 93

94 Supportive services required for participation in career or training services must be  
95 provided in accordance with [Workforce Policy - P109 Supportive Services and Needs-](#)  
96 [Related](#) Payments and recorded in Employ Florida in accordance with the Employ Florida  
97 Service Code Guide.

98

99 **3. Other Work-Based Learning Opportunities**

100 Work-based learning provides WIOA-eligible participants with career exploration and skill  
101 development. LWDBs may offer programs combining paid or unpaid work experience with  
102 academic and occupational education, delivered either together or separately.  
103 Requirements are outlined in [Workforce Policy P100- Training and Work-Based Learning](#)  
104 [Opportunities](#). Although these costs are not paid through ITA they must be recorded in  
105 SERA under Work Experience and Internships and can count towards the state ITA  
106 expenditure requirement.

107

108 **4. Co-Enrollment in other training service programs**

109

110 A maximum of 25% of the required 50% state ITA expenditure requirement can be met  
111 through participants enrolled in the WIOA Adult or Dislocated Worker program whose  
112 training tuition and required fees are paid for by another federal or state program if the  
113 following conditions are met:

- 114 a. Training aligns with in-demand occupations and has been determined appropriate by  
115 the LWDB.
- 116 b. Documented case management, navigation, and support services are provided; and
- 117 c. Credential attainment or documented training completion occurs.
- 118

119 Calculation is limited to training costs paid through another federal or state program and  
120 training case management as outlined below.

121

122 **5. Training Program and Case Management**

123 Costs associated with training program and case management are costs:

- 124 a. Directly related to staff time used in developing, implementing, or coordinating  
125 authorized training programs for participants identified in this policy, including costs  
126 directly related to case management and job placement services for clients in  
127 training (not clients seeking training).
- 128 b. Associated with developing, implementing, or coordinating local training for

129 eligible clients participating in training programs leveraged through other grants  
130 (e.g., Temporary Assistance for Needy Families, Pell Grants), including  
131 expenditures associated with the provision of support services to individuals  
132 while they are in training.

133  
134 Staff costs are limited to salaries and benefits.  
135

### 136 **C. Requirements and Associated Potential Consequences**

137  
138 LWDBs must allocate at least 50% of expected WIOA Adult and Dislocated Worker  
139 formula funds each fiscal year to meet the state ITA expenditure requirement. This  
140 percentage is based on carry-forward funds (estimated or actual) plus current year  
141 allocations. The required minimum allocation of 50 percent (or waiver percentage) must  
142 be shown in the budget submitted to FloridaCommerce.  
143

144 LWDBs must report monthly related expenditures in SERA for each of the specified state  
145 ITA sub-cost categories listed in Section III.B. of this policy. The Crosswalk reflects  
146 qualifying expenditures. To ensure the most effective use of WIOA funds, LWDBs that are  
147 unable to expend the required 50% or that have not secured a state ITA expenditure  
148 requirement waiver (see Section III.E., ITA Waiver Requests) risk having funds recaptured  
149 and reallocated in accordance with [Workforce Policy F7 – Recapture and Reallocation of](#)  
150 [WIOA Funds](#), and/or corrective action consistent with [Workforce Policy G104: Sanctions](#)  
151 [and Other Required Corrective Action for LWDBs Who Fail to Meet Federal and State](#)  
152 [Standards](#).  
153

### 154 **D. Integrated Service Delivery and Strategic Alignment**

155  
156 LWDBs should align planning and spending for workforce training with regional workforce  
157 priorities. This includes:  
158

- 159 1. Using labor market data and employer input to guide training investments.
- 160 2. Selecting training providers that support regional sector strategies.
- 161 3. Encouraging co-enrollment across WIOA programs to expand services and reduce  
162 duplication.
- 163 4. Actively promoting training opportunities to individuals who are unaware of or not engaged  
164 with career centers. Key strategies include community outreach and employer partnership  
165 in alignment with all applicable issued technical assistance.  
166

### 167 **E. ITA Waiver Requests**

168  
169 If an LWDB decides it cannot meet the state’s 50% Individual Training Account (ITA)  
170 expenditure requirement, it may request a waiver to spend less than the required amount. The  
171 waiver request must be submitted **before July 1** of the program year (PY) for which the waiver  
172 will apply. Both the LWDB and the Chief Local Elected Official(s) (CLEO) must review and  
173 approve the waiver request. The LWDB must complete a formal request that includes all  
174 required information, following the instructions provided in technical assistance issued for this  
175 topic. After local approval, the LWDB sends the request to FloridaCommerce’s Bureau of  
176 Financial Management, which reviews it and forwards it to CareerSource Florida’s Workforce  
177 Program Development unit. All waiver requests must follow the specific procedures outlined  
178 in this policy. Waivers are valid for one year only. Two options for waiver requests are outlined  
179 below.  
180

181  
182 **Option 1: The Simplified Waiver Option for High Performing LWDBs:**

- 183 1. LWDBs eligible for this option must demonstrate all the following:
- 184 a. An increase in recorded expenditures and/or individuals served in allowable
- 185 training cost categories outlined in Section III.B. except Section III.B.5., Training
- 186 Program and Case Management; and
- 187 b. A minimum of 25% (half) of the required 50% state ITA expenditures in WIOA Adult
- 188 and Dislocated Worker formula funds expended in all allowable training cost
- 189 categories outlined in Section III.B. except Section III.B.5., Training Program and
- 190 Case Management.
- 191 2. LWDBs that meet the criteria above will need to submit a request notifying Florida
- 192 Commerce and CareerSource Florida that they wish to utilize this option, in alignment with
- 193 issued technical assistance and guidance. Submission must include an attestation
- 194 indicating that the LWDB will continue to work to meet the 50% expenditure requirement.
- 195 FloridaCommerce and CareerSource Florida will review internally available data and
- 196 confirm eligibility for this option and notify the LWDB whether it is eligible to apply through
- 197 the Simplified Waiver Option format or if a Standard Waiver Application is required. No
- 198 additional information will be required for LWDBs qualifying for this waiver type.
- 199

200 **Option 2: The Standard Waiver Option:**

201 Waiver requests of the 50% expenditure requirement must not be below 30% and must

202 include both detailed projections for how the requested waiver will meet local training needs

203 and projected expenditure for the following program year in all applicable categories

204 described in Section III.B., should the waiver be approved. Other documentation required will

205 be outlined in technical assistance and guidance.

206

207 Boards granted this type of waiver must meet at least three times of the course of the fiscal

208 year with FloridaCommerce and CareerSource Florida to review fiscal and programmatic data

209 related to training services, in alignment with the terms of the waiver acceptance

210 communicated to the LWDB within the waiver acceptance notification.

- 211 1. The ITA Review Committee, which includes staff from CareerSource Florida and Florida
- 212 Commerce, will determine the sufficiency of the waiver request. If further clarification
- 213 is required, a meeting will be scheduled between the LWDB and the ITA
- 214 Review Committee. The ITA Review Committee may:
- 215 a. Request additional documentation.
- 216 b. Propose adjustments to the requested waiver, to include alternate negotiated
- 217 expenditure rate(s) in whole or by expenditure category.
- 218 2. The LWDB may accept, counter, or reject the proposed rate. Rejection requires attestation
- 219 that the board understands the full 50% expenditure requirement will apply.
- 220

221 **IV. IMPLEMENTATION**

222

223 LWDBs must create clear local strategies for optimizing workforce training that align with state

224 and federal rules. These strategies must include monthly tracking of spending on training

225 programs, including ITA; plans that match local workforce needs; and outreach to underserved

226 groups. Boards must also define staff roles, train staff to promote training services, and

227 document how they provide support services, case management, and co-enrollment across

228 WIOA programs. FloridaCommerce will include this as part of its LWDB monitoring efforts.



## CareerSource Heartland Shines!

CareerSource Heartland encourages feedback from our job seeker and employer customers ... feedback that is critical to our success!

For the past year, feedback through a brief online survey has been telling us that we are doing a great job ... and that is GREAT NEWS!

Below are just some of the comments received since our last board meeting that we are very proud to share!



My case worker is amazing! I love her attentiveness. She has your best interest at heart and go's above and beyond. Also, she will provide you with excellent resources which ensures that you'll thrive within the employment market. ~**Eboni**

Everyone there is amazing at their jobs and super helpful when it comes to any question or concerns you may have. They always go above and beyond when searching for jobs. I'll always come to see my case worker if I need help with anything and sure enough she is always there to help no questions asked. I highly recommend her to anyone. ~**Alex**

My case worker was very helpful and professional. We appreciate everything she and all the other employees did to help me and my granddaughter. Thank you all very much. ~**Ronald**

"I wanted to take a moment to thank you and your team for accommodating us during our hiring event. We had an amazing turnout, with over 400 candidates coming through over the course of two days and we truly could not have pulled this off without all of your assistance. Thank you for partnering with Rural King and helping make this hiring event such a huge success. We truly appreciate everything you and your team did to support us." ~**Shelly Johnson** – District Human Resource Business Partner, Rural King



*CareerSource Heartland “helps you recruit the right employee through a variety of professional services”.*

Contact a Business Representative near you:

DeSoto County  
2160 NE Roan St.  
Arcadia, Florida 34266  
(863) 993-1008  
Fax (863) 993-1046

Hardee County  
17 E Main St.  
Wauchula, Florida 33763  
(863) 773-3030  
Fax (863) 773-3949

Highlands County  
5901 US Hwy 27 S, Suite 1  
Sebring, Florida 33870  
(863) 385-3672  
Fax (863) 382-4237

Okeechobee County  
207 SW Park Street  
Okeechobee, Florida 34974  
(863) 610-6000  
Fax (863) 484-8167

[www.careersourceheartland.com](http://www.careersourceheartland.com)

CareerSource Heartland is 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.



## Workforce Related Acronyms

AD	Adult
ADA	Americans with Disabilities Act
BEC	Business Enhancement Committee (CareerSource Heartland—CSH)
BOCC	Board of County Commissioners
BO	Business Operations Team (CSH)
CBO	Community Based Organization
CEO	Chief Elected Official
CEO	Chief Executive Officer
CFRPC	Central Florida Regional Planning Council
CS	Career Specialist
CBM	Center Branch Manager
CSE	Child Support Enforcement
CSF	CareerSource Florida (formerly Workforce Florida, Inc.)
CSH	CareerSource Heartland (formerly Heartland Workforce)
CSS	Customer Service Specialist
CWE	Career Work Experience
DCF	Department of Children & Families
DEO	Department of Economic Opportunity
DOE	Department of Education
DOL	Department of Labor
DOL	Demand Occupations List (formerly TOL—Targeted Occupations List)
DOR	Department of Revenue
DVOP	Disabled Veteran’s Outreach Program
DW	Dislocated Worker
EAP	Employment Assistance Program (local name for the Welfare Transition Program)
ECR	Early Childhood Resources
EF	Employ Florida (the State’s public labor exchange system)
EDC/O	Economic Development Commission/Office
ELCFH	Early Learning Coalition of Florida’s Heartland
ETA	Employment and Training Administration (USDOL)
EWT	Employed Worker Training

FBO	Faith Based Organization	PY	Program Year/Project Year
FEMA	Federal Emergency Management Agency		
FETPIP	Florida Education Training Placement Information Program	QRT	Quick Response Training (part of FloridaFlex)
FF	FloridaFlex (CSF Employee Training Options)	RA	Reemployment Assistance (formerly called Unemployment)
FHERO	Florida Heartland Economic Region of Opportunity	REA	Reemployment Eligibility Assessment
F&O	Finance & Operations Committee (CSH)	REACT	Reemployment and Emergency Assistance Coordination Team
FWDA	Florida Workforce Development Association		
FY	Fiscal Year	REACH	Reimagining Education and Career Help Act
HW	Heartland Workforce <i>(former name of CareerSource Heartland)</i>	RES	Re-employment Services
HWIB	Heartland Workforce Investment Board, Inc. (d/b/a/ CareerSource Heartland)	RFP	Request for Proposals
HRTPO	Heartland Regional Transportation Planning Organization	RFQ	Request for Quotations or Qualifications
		RIG	Rural Initiative Grant
		ROI	Return on Investment
		RSA	Resource Sharing Agreement
		RSEA	Re-employment Services & Eligibility Assessment - new name for Florida's "unemployment insurance" program
IDA	Industrial Development Authority		
IFA	Infrastructure Funding Agreement		
ISY	In-School Youth		
ITA	Individual Training Account	SBDC	Small Business Development Center
IWT	Incumbent Worker Training (part of FloridaFlex)	SNAP	Supplemental Nutritional Assistance Program
JD	Job Developer/Job Development	SY	Summer Youth
JMP	Joint-Managed Programs		
		TAA/TRA	Trade Adjustment Assistance/Trade Readjustment Assistance
LEO	Local Elected Official	TABE	Test of Adult Basic Education
LLSIL	Lower Living Standard Income Level	TANF	Temporary Assistance for Needy Families
LVER	Local Veteran's Employment Representative		
LWDA	Local Workforce Development Area; and		
LWDB	Local Workforce Development Board	UC/UI	Unemployment Compensation/Unemployment Insurance—renamed to Reemployment Assistance (in Florida)
		USDOL	United States Department of Labor
MOU	Memorandum of Understanding		
MSFW	Migrant Seasonal Farm Worker	VR	Vocational Rehabilitation
		WARN	Worker Adjustment and Retraining Notification
NAWB	National Association of Workforce Boards	WDB	Workforce Development Board
NEG	National Emergency Grant	WE	Work Experience
NFA	Notice of Funds Available	WIOA	Workforce Innovation and Opportunity Act
		WOTC	Work Opportunity Tax Credit
OJT	On-the-Job Training	WP	Wagner Peyser
O*NET	Occupational Information Network	WT or WTP	Welfare Transition or Welfare Transition Program (locally named the Employment Assistance Pgm.)
OPS	Other Personnel Services		
OSHA	Occupational Safety and Health Administration		
OSMIS	One-Stop Management Information System		
OSO	One-Stop Operator		
OSST	One-Stop System Tracking		
OSY/OOSY	Out-of-School Youth		



## Programs Report

July 2025 – March 2026

WIOA		July-Mar	
<b>Adult</b>	Enrolled	<b>51</b>	
	Participated in Training	49	
	Career Services	2	
	Entered Employment <span style="float: right;">17/17</span>	100.0%	
	Average Wage at Placement	\$19.85	
	DeSoto and Hardee	\$19.67	
	Highlands	\$20.03	
	Okeechobee	\$0.00	
<b>Dislocated Worker</b>	Enrolled*	<b>0</b>	
	Participated in Training	0	
	Career Services	0	
	Entered Employment <span style="float: right;">0/0</span>	0.0%	
	Average Wage at Placement	\$0.00	
	DeSoto and Hardee	\$0.00	
	Highlands	\$0.00	
	Okeechobee	\$0.00	
<b>In-School Youth</b>	Enrolled	<b>39</b>	
	Positive Outcome Rate <span style="float: right;">20/20</span>	100.0%	
<b>Out-of-School Youth</b>	Enrolled	<b>61</b>	
	Participated in Training	61	
	Positive Outcome Rate <span style="float: right;">7/7</span>	100.0%	
<b>Wagner Peyser</b>			
<b>Employer Services</b>	Total Employers Served	1,468	
	Individual Employer Services	7,553	
	Job Placement Wage Rate	\$16.48	
	Entered Employment Rate	40.3%	
<b>Job Seeker Services</b>	Individuals Receiving Services	2,966	
	Services Provided Individuals	29,003	

\*No participants enrolled in Dislocated Worker for the quarter.  
Data is posted as draft – results subject to change.

### Reported Unemployment Rate by County/State for December 2025 (not seasonally adjusted)

DeSoto 5.6%    Hardee 5.9%    Highlands 6.3%    Okeechobee 5.3%    Florida 4.4%

## **PROGRAMS REPORT II: NARRATIVE**

### **July 2025 – December 2025**

#### **INITIATIVES**

##### ***NON-CUSTODIAL PARENT EMPLOYMENT PROGRAM (NCPEP)***

The NCPEP grant for program year 2025–2026 is progressing successfully, with 11 participants currently enrolled, four of whom have secured employment. The grant is designed to support parents who face challenges in meeting their child support obligations by providing access to training and employment opportunities. Through this initiative, participants are better positioned to fulfill their financial responsibilities while advancing toward long-term self-sufficiency.

##### ***SECTORS OF STRATEGIC FOCUS***

This state set-aside initiative is designed to support career exploration, occupational skills training, and work-based learning opportunities - including On-the-Job Training (OJT), Customized Training, Incumbent Worker Training (IWT), Internships, Registered Apprenticeships, and Work Experience - along with the provision of supportive services in identified sectors of strategic focus. CareerSource Heartland has already enrolled several participants in the program, all of whom are currently engaged in occupational skills training, with three participants having secured employment. The initiative aims to support both Florida jobseekers and businesses by connecting individuals to opportunities within targeted industry sectors, enhancing training and employment outcomes, and strengthening talent pipelines to meet the workforce needs of in-demand industries. Sectors of strategic focus include:

- Transportation, including diesel mechanics and trucking,
- Logistics and Supply Chain,
- Manufacturing, and
- Healthcare that includes nursing and other critical high demand needs.

##### ***NETWORK NAVIGATORS***

This revised state set-aside initiative supports Apprenticeship Navigator functions, which are designed to lead and strengthen local and regional efforts to develop, expand, and sustain Registered Apprenticeship Programs (RAPs) and Registered Pre-Apprenticeship Programs (pre-RAPs). These efforts include promoting the benefits of apprenticeship opportunities to employers, industry associations, business groups, economic development organizations, educational partners, community organizations, and job seekers. CareerSource Heartland is currently collaborating with local apprenticeship partners as part of this initiative. In addition, the initiative supports Hope Florida Navigator activities, which focus on advancing local and regional efforts to develop, expand, and support Hope Florida objectives. This includes promoting program benefits to employers, industry associations, business groups, economic development organizations, educational partners, community organizations, and job seekers.

##### ***STATE RURAL INITIATIVES***

These funds are intended to expand access to workforce services, accelerate training and employment outcomes, and strengthen local talent pipelines and workforce partnerships in economically distressed rural communities. To date, 34 individuals have completed training in ELI Icehouse, 5G Power Skills, and Career Readiness and Job Retention workshops. Of these participants, 28 have received supportive services. Services include:

- ELI Icehouse – Entrepreneurial Skills training.
- 5G Power Skills – Foundational skills courses for adults and businesses.
- Online Computer Skills – These courses are for businesses. SFSC and IRSC have committed to scheduling in person classes on a demand basis to meet the needs of the employers. Online courses are already available.
- Artificial Intelligence Overview – These classes are already available through SFSC with ten participants identified. IRSC has committed to building and schedule this course when a minimum of ten participants is identified. Both IRSC and SFSC already have online options available.

- Career Readiness and Job Retention Workshops – working with the Okeechobee Sheriff’s Department to finalize the details.
- ABE/GED Program – Working with law enforcement agencies to determine their need.
- Electrical Journeyman’s Exam Preparation – Training in groups to prepare trainees to pass the Electrical Journeyman’s exam.

### **ONLINE TRAINING OPPORTUNITIES**

To help employers access better-trained, higher-skilled employees and job applicants, CareerSource Heartland continues to enroll participants in:

- Florida Ready to Work – Soft skills training, featuring four key modules: Effective Communication, Professionalism, Teamwork and Collaboration, and Critical Thinking and Problem Solving. To date, 28 individuals have successfully completed all four modules.
- Metrix Learning – An online learning platform that equips individuals with the skills needed to adapt and thrive in today’s changing job market. During this quarter, 110 new participants enrolled in a variety of training programs. Collectively, they completed 2,383 training hours and successfully passed 1,752 courses.

### **CAREER SOURCE HEARTLAND CENTERS HIGHLIGHTS**

January 2026 – March 2026, Business Operations and/or Career Center staff:

- ✓ Attended a DeSoto County Economic Development Summit.
- ✓ Participated in a State of the County event in Hardee County.
- ✓ Held a two-day hiring event in January for Rural King, opening soon in Highlands County. There were over 400 job seekers in attendance.
- ✓ Participated in the annual Career Expo held at the Alan Jay Center.
- ✓ Delivered a presentation to the Chamber of Commerce in Sebring on programs and services with emphasis on the Youth Program.
- ✓ Focused on implementing numerous new processes and grant requirements received from FloridaCommerce.

### **MIGRANT SEASONAL FARM WORKER (MSFW) SERVICES**

The Hardee Career Center is designated as a "significant" career center due to Migrant and Seasonal Farm Workers (MSFWs) comprising an estimated ten percent or more of the local job-seeking population. MSFW Outreach Workers ensures effective communication with crew leaders and agricultural employers through in-person visits, phone calls, and email providing job referrals and other essential services. Notably, H-2A agricultural job orders continue to be posted, indicating a growing demand for visa workers in temporary or seasonal roles.

### **YOUTH SERVICES**

CareerSource Heartland Youth staff continued to assist Youth participants in person, virtually, by telephone, and email.

- ✓ Out-of-School Youth – Continue to work diligently with local businesses to partner in support of Work Experience and Job Shadowing opportunities. Youth focus on workforce preparation activities that include, but are not limited to: GED preparation, soft skills training, financial literacy education, and vocational skills training.
- ✓ In-School Youth - Focuses on high school graduation, soft skills, and career awareness to prepare them for the workforce or post-secondary educational opportunities.

CareerSource Heartland  
2025/2026 Expenditure Report  
YTD February 28, 2026

Revenue Budget or Fund Balance	WIA/WIOA Adult	WIOA Dislocated Worker	WIOA Youth	TANF	Veterans Programs LVER	NDWG IAN	Wagner- Peysner	SNAP	Rural Initiative Grant (RIG)	Rapid Response	WIOAHope	Network Navigator	State Rural	Strategic Focus	RESEA	Non-Custodial	Hope-FL Navigator	Non-Federal	TOTALS				
25-26 Budgeted Awards	\$ 451,281	\$ 206,067	\$ 524,901	\$ 646,733	\$ 11,361		\$ 32,535	\$ 247,428	\$ 250,000	\$ 65,000		\$ 138,571	\$ 500,000	\$ 45,000	\$ 62,196	\$ 200,000	\$ -			\$ 3,381,073			
Transfers/Increase Award	\$ 238,739	\$ (238,739)	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,930		\$ 4,930			
Carryover 24/25	\$ 102,004	\$ 239,037	\$ 410,041	\$ 105,581	\$ 3,700	\$ 72	\$ 7,359	\$ 55,803	\$ -	\$ -	\$ 861	\$ -	\$ -	\$ -	\$ 33,781	\$ 10,959	\$ 5,842	\$ -	\$ 48,470	\$ 1,023,511			
<b>TOTAL</b>	<b>\$ 792,024</b>	<b>\$ 206,365</b>	<b>\$ 934,942</b>	<b>\$ 752,314</b>	<b>\$ 15,061</b>	<b>\$ 72</b>	<b>\$ 39,894</b>	<b>\$ 303,231</b>	<b>\$ 250,000</b>	<b>\$ 65,000</b>	<b>\$ 861</b>	<b>\$ 138,571</b>	<b>\$ 500,000</b>	<b>\$ 45,000</b>	<b>\$ 95,977</b>	<b>\$ 210,959</b>	<b>\$ 5,842</b>	<b>\$ 53,400</b>		<b>\$ 4,409,514</b>			
<b>EXPENDITURES</b>																				<b>TOTAL EXPENDITURES</b>	<b>BUDGET</b>	<b>BUDGET VARIANCE Under/(Over)</b>	<b>% Exp</b>
Operational Expenditures *	\$ 392,128	\$ 295	\$ 491,022	\$ 305,629	\$ 2,410	\$ 72	\$ 9,552	\$ 82,275	\$ 76,469	\$ 10,605	\$ 861	\$ 48,966	\$ 24,653	\$ 9,873	\$ 65,535	\$ 17,635	\$ 5,842	\$ 57	\$ 1,543,879	\$ 2,499,463	\$ 955,584	61.8%	
Program Expenditures	\$ 83,891	\$ -	\$ 45,716	\$ 16,282	\$ 4,767	\$ -	\$ 12,301	\$ 9,390	\$ 100,794	\$ 78	\$ -	\$ 818	\$ 27,770	\$ 30,292	\$ 4,091	\$ 3,368	\$ -	\$ 238	\$ 339,796	\$ 1,910,050	\$ 1,570,254	17.8%	
Personnel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Travel	\$ 606	\$ -	\$ 1,437	\$ 5	\$ 1,337	\$ -	\$ 439	\$ -	\$ 59	\$ 78	\$ -	\$ 818	\$ 129	\$ 52	\$ 436	\$ -	\$ -	\$ -	\$ 5,395	\$ 7,800	\$ 2,405	69.2%	
Staff Development	\$ -	\$ -	\$ 405	\$ -	\$ 405	\$ -	\$ -	\$ 200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,010	\$ 1,250	\$ 240	80.8%	
Rent	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Computer/Phone Network	\$ -	\$ -	\$ -	\$ -	\$ 851	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 851	\$ 1,200	\$ 349	70.9%	
Computer Software	\$ 7,667	\$ -	\$ 14,215	\$ 7,667	\$ -	\$ -	\$ -	\$ 7,667	\$ 15,917	\$ -	\$ -	\$ -	\$ 1,980	\$ -	\$ 2,917	\$ -	\$ -	\$ -	\$ 58,028	\$ 60,500	\$ 2,472	95.9%	
Computer Supplies	\$ -	\$ -	\$ 123	\$ -	\$ -	\$ -	\$ 245	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 368	\$ 760	\$ 392	48.4%	
Minor Equipment (Non-Capitalized)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,468	\$ 2,600	\$ 132	94.9%	
Repairs/Maintenance/Janitorial	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Office Supplies	\$ 23	\$ -	\$ 232	\$ -	\$ 184	\$ -	\$ 52	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 912	\$ -	\$ 96	\$ -	\$ -	\$ 238	\$ 1,736	\$ 2,538	\$ 802	68.4%	
Advertising/Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Postage and Delivery	\$ -	\$ -	\$ 27	\$ 89	\$ -	\$ -	\$ -	\$ 23	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 224	\$ -	\$ -	\$ -	\$ 363	\$ 526	\$ 163	69.0%	
Background Screening/Fingerprintin	\$ -	\$ -	\$ -	\$ 298	\$ -	\$ -	\$ 667	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 965	\$ 1,065	\$ 100	90.8%	
Monitoring Fees	\$ 3,585	\$ -	\$ 2,846	\$ 4,650	\$ -	\$ -	\$ 2,494	\$ 1,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 15,075	\$ 15,075	\$ -	100.0%	
Professional Fees	\$ 416	\$ -	\$ 815	\$ 123	\$ -	\$ -	\$ -	\$ -	\$ 15	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,369	\$ 2,000	\$ 631	68.4%	
Dues and Subscriptions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Fair Share Costs	\$ -	\$ -	\$ -	\$ -	\$ 1,990	\$ -	\$ 8,403	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 419	\$ -	\$ -	\$ 10,813	\$ 15,200	\$ 4,387	71.1%	
Education/Training - Client ITA	\$ 59,851	\$ -	\$ 2,460	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 84,804	\$ -	\$ -	\$ -	\$ -	\$ 30,240	\$ -	\$ -	\$ -	\$ -	\$ 177,354	\$ 201,000	\$ 23,646	88.2%	
Education/Training - Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,750	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,750	\$ 30,000	\$ 23,250	22.5%	
On-the-Job Training (OJT)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 35,000	\$ 35,000	0.0%	
Employed Worker Training (EWT)	\$ 2,873	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,873	\$ 22,500	\$ 19,628	12.8%	
Work Experience (WE)	\$ -	\$ -	\$ 5,574	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,574	\$ 15,000	\$ 9,426	37.2%	
Transportation	\$ 8,872	\$ -	\$ 2,450	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,050	\$ -	\$ -	\$ 500	\$ -	\$ -	\$ 12,872	\$ 19,800	\$ 6,928	65.0%	
Child Care	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Support Services	\$ -	\$ -	\$ 1,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 400	\$ -	\$ -	\$ 1,400	\$ 3,150	\$ 1,750	44.4%	
Direct Client costs	\$ -	\$ -	\$ 17,582	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 16,950	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 34,532	\$ 100,000	\$ 65,468	34.5%	
Available Budget - Unassigned	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,373,086	\$ 1,373,086	\$ -
<b>Total Expenditures</b>	<b>\$ 476,019</b>	<b>\$ 295</b>	<b>\$ 536,738</b>	<b>\$ 321,911</b>	<b>\$ 7,177</b>	<b>\$ 72</b>	<b>\$ 21,853</b>	<b>\$ 91,665</b>	<b>\$ 177,263</b>	<b>\$ 10,683</b>	<b>\$ 861</b>	<b>\$ 49,784</b>	<b>\$ 52,423</b>	<b>\$ 40,165</b>	<b>\$ 69,626</b>	<b>\$ 21,003</b>	<b>\$ 5,842</b>	<b>\$ 295</b>	<b>\$ 1,883,675</b>	<b>\$ 4,409,513</b>	<b>\$ 2,525,838</b>	<b>42.7%</b>	
Unexpended Balance	\$ 316,005	\$ 206,070	\$ 398,204	\$ 430,403	\$ 7,884	\$ 0	\$ 18,041	\$ 211,567	\$ 72,737	\$ 54,317	\$ (0)	\$ 88,788	\$ 447,577	\$ 4,835	\$ 26,351	\$ 189,956	\$ 0	\$ 53,105	\$ 2,525,839				
% of Funds Expended	60.10%	0.14%	57.41%	42.79%	47.65%	100.00%	54.78%	30.23%	70.91%	16.44%	100.03%	35.93%	10.48%	89.26%	72.54%	9.96%	100.00%	0.55%	42.72%				
Direct Encumbrances	\$ 5,000	\$ -	\$ 2,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 12,500				
Pooled/Operational Encumbrances	\$ 74,598	\$ 111,256	\$ 218,978	\$ 144,371	\$ 90	\$ 0	\$ 3,835	\$ 92,725	\$ 23,531	\$ 29,395	\$ (0)	\$ 83,534	\$ 95,347	\$ 1,127	\$ 19,465	\$ 57,365	\$ -	\$ 4	\$ 955,621				
Unencumbered Balance	\$ 236,407	\$ 94,814	\$ 176,726	\$ 286,032	\$ 7,794	\$ -	\$ 14,206	\$ 118,842	\$ 44,206	\$ 24,923	\$ -	\$ 5,253	\$ 352,230	\$ 3,708	\$ 6,886	\$ 132,591	\$ 0	\$ 53,101	\$ 1,557,718				
% of Funds Unencumbered	29.85%	45.94%	18.90%	38.02%	51.75%	0.00%	35.61%	39.19%	17.68%	38.34%	0.00%	3.79%	70.45%	8.24%	7.17%	62.85%	0.00%	99.44%	35.33%				
* See Operational Expenditure Detail Report																							

**Report on Legislative Compliance  
30% State Defined Training Requirement  
Month Ended February 28, 2026**

	WIOA Adult PY 2024	WIOA Adult PY 2025	WIOA Adult Total	WIOA DW PY 2024	WIOA DW PY 2025	WIOA DW Total	Total WIOA Adult and WIOA DW
ITA Required Expenditure Levels	50% - Year 2 of 2	25% Year 1 of 2		50% - Year 2 of 2	25% Year 1 of 2		
Budget	102,004.53	451,280.00	553,284.53	239,037.00	206,067.00	445,104.00	998,388.53
Administrative Expenditures	13,328.43	13,317.28	26,645.71	26,688.15	0.00	26,688.15	53,333.86
Program Expenditures	88,676.10	121,968.67	210,644.77	212,344.20	0.00	212,344.20	422,988.97
Total Expenditures	102,004.53	135,285.95	237,290.48	239,032.35	0.00	239,032.35	476,322.83
% Expended	100.00%	29.98%	42.89%	100.00%	0.00%	53.70%	47.71%
State ITA Expenditures	20,552.88	62,693.20	83,246.08	46,141.11	0.00	46,141.11	129,387.19
State ITA % Expended (Program Base)	23.18%	51.40%	39.52%	21.73%	0.00%	21.73%	30.59%
Note: Waiver for 25/26 has been approved for 30%;						Excess/(Deficiency)	0.59%

**Report on Youth Work Experience Compliance  
20% Youth Work Experience Requirement  
Month Ended February 28, 2026  
Life to Date**

	WIOA Youth PY 2024 (Life-to-Date)	WIOA Youth PY 2025 (Life-to-Date)
WE Required Expenditure Levels	20%	20%
Budget	529,234.00	524,901.00
Administrative Expenditures	45,292.02	16,524.88
Program Expenditures	483,941.98	110,172.30
Total Expenditures	529,234.00	126,697.18
% Expended	100.00%	24.14%
WE Expenditures	47,614.26	5,249.21
WE % Expended (Program Base)	9.84%	4.76%
Excess/(Deficiency) - %	-10.16%	-15.24%

**CareerSource Heartland**  
**2025-2026 Operational Expenditure Detail Report**  
**YTD February 28, 2026**

	Management	DeSoto Center	Hardee Center	Highlands Center	Okeechobee Center	Total
<b>Total Pool Budgets</b>	<b>494,049.00</b>	<b>239,284.00</b>	<b>144,409.00</b>	<b>1,246,134.00</b>	<b>375,587.00</b>	<b>2,499,463.00</b>
<b>Expenditures</b>						
Personnel	247,120.32	72,939.10	99,368.88	600,330.28	171,405.55	1,191,164.13
Travel	667.49	1,563.47	735.17	2,612.72	1,462.69	7,041.54
Staff Development	4,449.75	202.50	202.50	1,014.25	405.00	6,274.00
Rent	8,407.37	0.00	6,551.00	116,516.58	17,200.00	148,674.95
Utilities	885.44	2,723.06	3,294.59	12,271.68	2,744.98	21,919.75
Telephone	799.68	1,427.40	1,214.96	7,321.16	1,399.44	12,162.64
Insurance	5,772.72	2,236.51	1,286.63	16,342.66	2,935.14	28,573.66
Computer & Phone Network	1,125.60	1,398.68	589.05	6,660.30	1,217.11	10,990.74
Computer Software	7,274.90	1,270.53	537.85	9,172.30	1,399.68	19,655.26
Computer Supplies	1,787.70	0.00	127.40	4,117.39	317.62	6,350.11
Minor Equipment - Non-Capitalized	0.00	0.00	0.00	173.91	0.00	173.91
Equipment Lease	351.98	799.98	298.08	2,047.86	799.98	4,297.88
Bldg Repairs/Janitorial	399.12	1,150.60	1,837.73	6,457.35	6,763.68	16,608.48
Office Supplies	1,391.01	403.82	363.90	2,198.77	716.510	5,074.01
Postage and Delivery	271.63	0.00	138.41	88.59	0.00	498.63
Legal Fees	1,120.00	0.00	0.00	0.00	0.00	1,120.00
Background Screening/Fingerprinting	2,888.43	0.00	0.00	0.00	0.00	2,888.43
Audit Fees	33,500.00	0.00	0.00	0.00	0.00	33,500.00
Monitoring Fees	7,200.00	0.00	0.00	0.00	0.00	7,200.00
Professional Fees	10,358.06	4,011.89	2,794.35	11,700.09	4,682.87	33,547.26
Dues and Subscriptions/Other Fees	61.25	150.00	125.00	1,158.20	15.75	1,510.20
Advertising/Outreach	126.09	0.00	0.00	1,439.88	0.00	1,565.97
Bank Charges/Payroll Processing	6,044.26	0.00	0.00	0.00	0.00	6,044.26
Program Income (Contra)			0.00	(225.00)	0.00	(225.00)
Fair Share/Resource Sharing (Contra)	(161.04)	(1,114.00)	(7,640.75)	(8,202.88)	(5,543.46)	(22,662.13)
<b>Total Pooled Expenditures</b>	<b>341,841.76</b>	<b>89,163.54</b>	<b>111,824.75</b>	<b>793,196.09</b>	<b>207,922.54</b>	<b>1,543,948.68</b>
<b>Unexpended Balance</b>	<b>152,207.24</b>	<b>150,120.46</b>	<b>32,584.25</b>	<b>452,937.91</b>	<b>167,664.46</b>	<b>955,514.32</b>
% Expended	69.19%	37.26%	77.44%	63.65%	55.36%	61.77%
% Unexpended	30.81%	62.74%	22.56%	36.35%	44.64%	38.23%
<b>Total Grant Expenditures</b>	<b>341,841.76</b>	<b>89,163.54</b>	<b>111,824.75</b>	<b>793,196.09</b>	<b>207,922.54</b>	<b>1,543,948.68</b>