



Finance & Performance Committee
Monday March 5, 2026 – 8:30 a.m. to 9:30 a.m.
Location: Microsoft Teams

This is a virtual or call-in meeting only

[Join Microsoft Teams Meeting](#)

Call-in 1-786-600-3104

Phone Conference ID: 685 385 715#

AGENDA

Call to Order – Jim Bos, Treasurer

Action Items – Jim Bos

- Approval of the January 8, 2026 Combined Executive Committee and Finance & Performance Committee meeting minutes – Jim Bos
- Approval of Transfer of Funds from Dislocated Worker to Adult – Robin Dawson
- Approval of Budget Modification #2 for PY2025-2026 – Robin Dawson

Finance Reports – Robin Dawson

- Finance Reports as of 12/31/2025
 - Budget to Expenditure Reports
 - Non-Federal Cash Balances

Performance Reports – Anthony Gagliano

- WIOA Indicators of Performance for Quarter to of PY2025-2026
- FloridaCommerce PY2025-2026 Preliminary Monitoring Report

Public Comments/Closing Remarks – Jim Bos

Adjournment – Jim Bos

Next Finance and Performance Committee Meeting: TBD

Location: Virtual Microsoft Teams Meeting



ACTION ITEMS - Meeting Minutes

**CareerSource Suncoast
Combined Executive Committee
And
Finance & Performance Committee
Meeting Minutes**
Teams Virtual Meeting
Thursday, January 8, 2026
8:00 a.m.

Absent Present	<u>Executive Committee Members</u>
P	David Kraft, Vision Consulting Group
P	Shaun Polasky, Helios Technologies
P	Eric Troyer, Kerkering, Barberio & Company
P	Lisa Eding, Teakdecking Systems
P	Jim Bos, MJB Group, LLC.
	<u>Finance & Performance Committee Members</u>
P	Jim Bos, MJB Group, LLC.
P	Lorri Kidder, Carr, Riggs & Ingram CPAs, and Advisors
A	Ericka Randall, Vocational Rehabilitation
P	Doras Davilla,
	Staff Present: Joshua Matlock, Anthony Gagliano, Kathy Bouchard, Robin Dawson, Christina Witt, Michelle Snyder, Karima Habity, James Disbro, Lori Sardinas

I. Call to Order

David Kraft, Chair, called the meeting to order at 8:00 a.m. Attendance was recorded, and a quorum was established.

II. Action Items

Approval of November 13, 2025, Executive Committee Meeting Minutes

David Kraft requested a motion to approve the November 13, 2025, Executive Committee meeting minutes with the noted change to remove the word “Discretionary” from the CEO bonus and correct a name spelling.

Motion: Jim Bos **Second:** Lisa Eding

The motion passed unanimously.

Approval of November 13, 2025, Finance & Performance Committee Meeting Minutes

Jim Bos requested a motion to approve the November 13, 2025, Finance & Performance Committee meeting minutes.

Motion: Lorri Kidder **Second:** Doras Davila

The motion passed unanimously.

Acceptance of the Financial Audit Report for Program Year Ending June 30, 2025

James Halleran, James Moore & Co., presented the PY ending June 30, 2025, financial audit report.

David Kraft requested a motion to accept the Financial Audit Report for Program Year Ending June 30, 2025

Motion: Lori Kidder **Second:** Doras Davila
The motion passed unanimously.

III. Finance and Performance Committee Meeting

Anthony Gagliano reviewed the CSS WIOA Performance Indicators for Quarter one of PY 2025-2026, ending 09/30/2025. A copy of the performance results was provided in the agenda packet.

IV. CEO Report – Joshua Matlock

Federal-Level: Henry Mack has been appointed Assistant Secretary of Labor for the Employment & Training Administration. His Florida background and strong relationships with local leaders are expected to benefit workforce initiatives. WIOA reauthorization is not expected soon, which workforce boards view positively because it gives them more time to address concerns—especially the challenging 50% ITA expenditure mandate. Workforce boards are actively collaborating with national associations and federal partners to improve the proposed WIOA language.

State-Level: Leadership will travel to Tallahassee for the CareerSource Florida Board of Directors and FWDA meeting. Boards will discuss state priorities and share key concerns and focus areas for the coming year. To include an ITA modernization proposal.

Apprenticeship Expansion: Florida’s apprenticeship system is currently constrained because only nine (9) Apprenticeship Training Representatives (ATRs) are responsible for statewide coverage, resulting in significant delays of 6–9 months in getting new apprenticeship programs approved. To address these bottlenecks, the proposal recommends assigning one ATR to each workforce board, converting existing ATRs into program approvers and expanding overall system capacity to reduce approval delays. The proposed funding source is the Pathways to Career Opportunities Grant (PCOG).

Strategic Planning: An overview of the strategic planning retreat held in October 2025 was provided.

V. Staff Reports

Kathy Bouchard

Programmatic Monitoring: Michelle Snyder and the team are currently preparing for the upcoming FloridaCommerce in February. CSS has received access to an AI automatic program monitoring tool. The tool provides real-time monitoring on programs.

Staff Retreat: CSS held their annual December staff retreat. The retreat focused on the work of the three work group committees: Technology and Efficiencies, Advancement and Succession Planning, and Culture of Recognition. The annual poll was conducted showing overall satisfaction levels remained consistent with the previous December, though slightly lower than the exceptionally high ratings from the August retreat.

Robin Dawson

Financial Monitoring: The accounting team is currently preparing for the FloridaCommerce financial monitoring in February.

990 Preparation: Currently working with James Moore and preparing the Form 990. The form will be sent to the board for review.

Staffing Updates: Jessica Grise will be leaving CSS due to relocation out of the state. Lori Sardinas has been promoted to the Accounting Manager. Whitney Voutour was an internal promotion as an Accounting Specialist.

Anthony Gagliano

CEO Program: A recent CEO program graduate was highlighted as a success story with a video. Registrations for the next cohort are strong, with around 130 participants, including eighteen from the Newtown CRA area, and hopes of reaching two hundred registrants. The program recently celebrated its largest graduating class in October 2025.

Business Services: The team is planning a job fair on January 29 at the 13th Ave. Dream Center in Bradenton. Employer and jobseeker registration remains open. Planning underway for additional events in South County and North Port in the spring.

Artificial Intelligence Integration: Thanks to Chet Filanowski, CSS now has a formal AI policy. Use of Microsoft Copilot expanded from 5 to 25 licenses. AI supports coding, automation, and client-facing communications. CSS has a new partnership with Go Gig to automate intake and assessment.

Summer Youth Program: Applications expected to open soon. Manatee County approved \$150,000 in funding to support forty-five youth. CSS continues a partnership with the Florida Lottery providing supplemental funding.

Hurricane Recovery: Collaboration with United Way South Sarasota County supported recovery activities and staffing. Recovery workers aided more than one hundred homes damaged by hurricanes. Sixty-three individuals placed into temporary employment; fourteen completed training. Programs collectively generated over \$1.5M in wages for affected workers.

VI. Public Comment/Closing Remarks – David Kraft

VII. Next Scheduled Meeting – David Kraft

Next Executive Committee meeting is scheduled for March 12, 2026, combined with the Board of Directors meeting.

Location: CareerSource Suncoast, 3660 N. Washington Blvd. Sarasota, Fl. 34234

VIII. Adjournment

David Kraft adjourned the meeting at 8:47 a.m.

Respectfully submitted,

Joshua Matlock

[Joshua Matlock \(Feb 20, 2026 10:30:20 EST\)](#)

Joshua Matlock
President/CEO



ACTION ITEMS - Transfer of Funds



Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs

From July 1, 2025 through June 30, 2026

LWDB Number and Name (Requestor): #18 - CareerSource Suncoast

Name / Title of Requestor Representative: Robin Dawson, CFAO

Adult and Dislocated Worker Transfer Request

Program Year	Program	Total Award Amount	Amount of Adult Requested to be Spent on DW	Percentage of Adult Requested to be Spent on DW	Amount of DW Requested to be Spent on Adult	Percentage of DW Requested to be Spent on Adult
PY25	Dislocated Worker	833,358.00	0.00	0	450,000.00	54%

COMPLETE THE BELOW SECTIONS FOR REQUESTS THAT EXCEED 25% OF THE PROGRAM'S ANNUAL ALLOCATION

Reason for requesting the use of one program's funding for the other (e.g. anticipated depletion of current funds, changes in labor market conditions, etc.):

PY25 Adult funds are estimated to be expended by 03.31.26. Dislocated workers are gravitating toward temp employment and rapid credentials, which we can fund using other grants.

A description of outreach/marketing activities conducted to ensure underserved populations were aware of available services:

We host a biweekly partners meeting featuring our school districts, post secondary providers, fellow nonprofits and government entities to share programs and services. We send twice monthly emails to all registered job seekers in the region. Our CEO presented to the Homeless to Home luncheon in December 2025. CareerSource also participates in a regional scholarship network and the Coalitions of Organizations Active in Disaster for both counties. CareerSource Suncoast created a referral platform called Crosswalk to easily connect clients to services inside and outside the organization.

Labor market conditions contributing to the need for the transfer:

Unemployment in LWDB #18 is at 4.9% as of Dec 2025 remains within 0.01% of a year ago. Most of our dislocated worker clients are coming in for NEGs Helene and Opioid.

The number of participants originally planned to be served by the base allocation compared to the estimated number of participants expected to be served after funds are transferred.

We had expected to serve 70 new adult clients and 8 new dislocated worker clients. Our projections now are 112 adult clients and 12 dislocated workers.

COMPLETE THE BELOW CERTIFICATION FOR REQUESTS THAT EXCEED 25% OF THE PROGRAM'S ANNUAL ALLOCATION

I certify the following:

1. When transferring from Adult to Dislocated Worker - The LWDB has sufficient funds to serve the WIOA Adult priority populations.
2. When transferring from Dislocated Worker to Adult - The LWDB has sufficient Dislocated Worker funds to serve dislocated workers in the local area; there are no pending layoffs that may impact the need for dislocated workers in the local area.
3. The full board voted to approve this request to transfer funds and a copy of the LWDB's meeting minutes are included with this request.

I certify the above information is true and correct.

David Kraft
Signature of Board Chair, 2026 17:17:25 EST

David Kraft
Print Name Date



ACTION ITEMS - Budget Modification

CareerSource Suncoast
 Summary of Funds Available - All Programs **Modification #2**
 Program Year 2025-2026
 July 1, 2025 - June 30, 2026

Funding Streams	Mod #1 Adj Funding Avail PY 25-26	Increase or (Decrease) in Funding PY 25-26	Mod #2 Adj Funding Avail PY 25-26	Less Reserve for PY 26-27	Mod #2 Funding Budgeted for PY 25-26	Notes
Temporary Assistance for Needy Families (TANF) exp 6/30/26	\$1,089,534	\$0	\$1,089,534	\$0	\$1,089,534	
Temporary Assistance for Needy Families (TANF) CFWD exp 8/31/25	\$100,056	\$0	\$100,056	\$0	\$100,056	
Total Temporary Assistance for Needy Families	\$1,189,590	\$0	\$1,189,590	\$0	\$1,189,590	
WIOA-Adult & Dislocated Worker exp 6/30/27	\$1,875,199	\$0	\$1,875,199	(\$158,880)	\$1,716,319	
WIOA-Adult & Dislocated Worker Carry Fwd exp 6/30/26	\$372,086	\$0	\$372,086	\$0	\$372,086	
Total WIOA Adult & Dislocated Worker	\$2,247,285	\$0	\$2,247,285	(\$158,880)	\$2,088,405	
WIOA-Youth exp 6/30/27	\$719,270	\$0	\$719,270	(\$156,000)	\$563,270	
WIOA-Youth Carry Fwd exp 6/30/26	\$242,487	\$0	\$242,487	\$0	\$242,487	
Total WIOA Youth	\$961,757	\$0	\$961,757	(\$156,000)	\$805,757	
NEG Dislocated Worker Ian Carry Fwd exp 9/30/25	\$241,000	\$0	\$241,000	\$0	\$241,000	
NEG Dislocated Worker Helene Carry Fwd exp 9/30/26	\$1,504,670	\$0	\$1,504,670	(\$62,409)	\$1,442,261	
NEG Dislocated Worker Opioid exp 12/31/26	\$166,069	\$50,000	\$216,069	(\$25,708)	\$190,361	Additional funds received
WIOA State Rapid Response exp 6/30/26	\$90,000	\$0	\$90,000	\$0	\$90,000	
WIOA State Sectors of Strategic Focus (SOSF) exp 6/30/26	\$145,000	\$0	\$145,000	\$0	\$145,000	
WIOA State Rapid Credentialing exp 10/31/25	\$38,703	\$0	\$38,703	\$0	\$38,703	
WIOA Sector-Based Trng Initiative exp 9/30/25	\$8,122	\$0	\$8,122	\$0	\$8,122	
WIOA Hope exp 8/31/25	\$8,694	\$0	\$8,694	\$0	\$8,694	
Wagner Peyser 7B-Network Navigators exp 6/30/26	\$163,571	\$0	\$163,571	\$0	\$163,571	
Wagner Peyser 7A (WP) exp 9/30/26	\$612,020	\$0	\$612,020	(\$40,000)	\$572,020	
Wagner Peyser 7A (WP) Carry Fwd exp 9/30/25	\$161,595	\$0	\$161,595	\$0	\$161,595	
Total Wagner Peyser 7A	\$773,615	\$0	\$773,615	(\$40,000)	\$733,615	
State FL-Rural Initiatives exp 6/30/26	\$150,000	\$0	\$150,000	\$0	\$150,000	
State FL-Non-Custodial Parent Employment Prog exp 6/30/26	\$1,041,671	\$0	\$1,041,671	\$0	\$1,041,671	
Veteran's Programs (DVOP & LVER) estimate	\$105,948	\$0	\$105,948	\$0	\$105,948	
Reemployment Svcs & Eligibility Assess (RESEA) estimate	\$194,793	\$0	\$194,793	(\$31,042)	\$163,751	
Supple Nutrition Assist Prog Employment & Training (SNAP) est	\$80,617	\$0	\$80,617	(\$15,750)	\$64,867	
Total	\$9,111,105	\$50,000	\$9,161,105	(\$489,789)	\$8,671,316	Only change is increase in funding - Opioid

CareerSource Suncoast
 Budget **Mod #2**
 Program Year 2025-2026

	Mod #1 Funding Budgeted PY 25-26	Increase or (Decrease)	Mod #2 Funding Budgeted PY 25-26	Notes
Funding Available Less Reserves	\$8,621,316	\$50,000	\$8,671,316	For details of increase see Summary of Funds Available Mod #2 worksheet
Personnel Costs:				
Salaries & Fringe Benefits	\$4,510,508	\$2,350	\$4,512,858	Indirect for Opioid & transfer to ER & Client Svcs
Staff Training & Education	28,919		28,919	
Total Personnel Costs	\$4,539,427	\$2,350	\$4,541,777	
Facility Costs	\$512,000	\$0	\$512,000	
Office Furniture & Equipment	\$35,947	\$0	\$35,947	
Operating Costs-Career Ctrs & Adm:				
Accounting & Audit	\$87,032	\$0	\$87,032	
Consultants & Legal	53,500		53,500	
General Insurance	58,836		58,836	
Office Supplies & Expense	31,609		31,609	
Travel & Meetings	73,000		73,000	
Total Operating Costs	\$303,977	\$0	\$303,977	
Program Services:				
Client Training & Support	\$3,043,759	\$44,650	\$3,088,409	Increase to client trng & support for opioid grant
Employer & Client Services	41,800	3,000	44,800	Transfer fr Salaries/FB
Outreach	134,406		134,406	
Total Program Services	\$3,219,965	\$47,650	\$3,267,615	
Totals	\$8,611,316	\$50,000	\$8,661,316	



FINANCE REPORTS

CareerSource Suncoast
 Expenditure To Budget Report - Summary
 Program Year July 1, 2025 thru June 30, 2026
 As Of 12/31/2025 (with accruals)

	PY TOTAL BUDGET MOD #1	RESTRICTED EXPENSES YTD	BUDGET BALANCE	% OF BUDGET EXPENDED	NOTES
PERSONNEL COSTS					
SALARIESFRINGE BENEFITS	\$4,510,508	\$2,190,117	\$2,320,391	49%	
STAFF TRAINING & EDU	\$38,919	\$29,383	\$9,536	75%	Staff development/trng fr Summit and general trng is during Qtr 1 & 2
TOTAL PERSONNEL COSTS	\$4,549,427	\$2,219,500	\$2,329,927	49%	
FACILITY COSTS	\$512,000	\$241,217	\$270,783	47%	
EQUIP & FURNITURE	\$35,947	\$23,357	\$12,590	65%	
OPERATING COSTS:					
ACCOUNTING/AUDIT	\$87,032	\$47,562	\$39,470	55%	James Moore Audit Engagement Oblig \$7,500
CONSULTANTS/LEGAL	\$53,500	\$25,652	\$27,848	48%	OSO Contract Oblig \$20,417
GENERAL INSURANCE	\$58,836	\$51,005	\$7,831	87%	Policies begin July 1
OFFICE SUPP & EXP	\$31,609	\$9,811	\$21,798	31%	
TRAVEL & MEETINGS	\$73,000	\$34,153	\$38,847	47%	
TOTAL OPERATING COSTS	\$303,977	\$168,183	\$135,794	55%	
PROGRAM SERVICES:					
CLIENT TRAINING/SUPPORT	\$3,043,759	\$1,207,605	\$1,836,154	40%	Oblig \$1,416,313 / actual exp & oblig 86%
EMPLOYER & CLIENT SERVICES	\$41,800	\$40,875	\$925	98%	
OUTREACH	\$134,406	\$32,414	\$101,992	24%	EDCs oblig \$28,333 & LCANs oblig \$35k
TOTAL PROGRAM SERVICES	\$3,219,965	\$1,280,895	\$1,939,070	40%	
TOTALS	\$8,621,316	\$3,933,153	\$4,688,163	46%	Rates below as of 12/2025: Overall Admin 8.64% - Max 10% Fiscal Year: ITA 44.56%. Min Req 40% LTD: Paid Internships Exp: PY24 34.02% - PY25 36.18%, Min Req 20% Out of Sch Exp: PY24 97.75% - PY25 100.00% Min Req 50%. Yth
				Expected burn rate as of 12/31/25	50%



**By Fundsource
PY25-26
7/01/2025-12/31/2025**

Revenue:	Annual Budget Mod #1	NEG																		Sector Strat	Network Nav	State Init	Rural Vet
		TANF	WIOA AD/Dis Wrk	WIOA Youth	WIOA Rap Resp	WIOA Hope FL PW	SBTI	NEG Opioid Foster Rec	NEG Hurricane IAN	WP	SNAP	RESEA	NCEP	Rap Cred	Helene/Milton								
Carry Forward Funds from PY 24-25	\$2,994,973	\$100,056	\$372,086	\$242,487	\$0	\$0	\$0	\$166,069	\$241,000	\$161,595	\$0	\$0	\$101,062	\$0	\$1,504,670	\$0	\$0	\$0	\$105,948				
Allocation Awards PY 25-26	\$6,116,132	\$1,089,534	\$1,875,199	\$719,270	\$90,000	\$8,694	\$8,122	\$0	\$0	\$612,020	\$80,617	\$194,793	\$940,609	\$38,703	\$0	\$145,000	\$163,571	\$150,000	\$0				
Total Available Funding	\$9,111,105	\$1,189,590	\$2,247,285	\$961,757	\$90,000	\$8,694	\$8,122	\$166,069	\$241,000	\$773,615	\$80,617	\$194,793	\$1,041,671	\$38,703	\$1,504,670	\$145,000	\$163,571	\$150,000	\$105,948	\$0			
LESS: Planned Carry Fwd (Reserve) PY 26-27	(\$489,789)	\$0	(\$158,880)	(\$156,000)	\$0	\$0	\$0	(\$25,708)	\$0	(\$40,000)	(\$15,750)	(\$31,042)	\$0	\$0	(\$62,409)	\$0	\$0	\$0	\$0				
Total Revenue Budgeted PY 25-26	\$8,621,316	\$1,189,590	\$2,088,405	\$805,757	\$90,000	\$8,694	\$8,122	\$140,361	\$241,000	\$733,615	\$64,867	\$163,751	\$1,041,671	\$38,703	\$1,442,261	\$145,000	\$163,571	\$150,000	\$105,948				
Budgeted Mod #1 Expenditures:		Expenditures To Date:																		Total Expenditures	% of Budget		
Salaries & Benefits	\$4,510,508	\$528,300	\$641,240	\$280,597	\$28,511	\$8,481	\$209	\$23,285	\$61,226	\$114,624	\$22,276	\$112,668	\$168,833	\$2,978	\$73,041	\$9,467	\$74,609	\$0	\$39,772	\$2,190,117	48.6%		
Staff Training & Education	\$38,919	\$10,873	\$10,463	\$4,132	\$7	\$0	\$0	\$205	\$284	\$1,611	\$92	\$343	\$698	\$5	\$221	\$0	\$14	\$0	\$435	\$29,383	75.5%		
Facility Costs	\$512,000	\$32,224	\$39,134	\$17,388	\$77	\$59	\$10	\$138	\$6,672	\$112,268	\$1,118	\$5,879	\$13,447	\$92	\$3,094	\$9	\$132	\$0	\$9,477	\$241,217	47.1%		
Furniture & Equipment	\$35,947	\$848	\$1,139	\$492	\$2	\$0	\$0	\$4	\$0	\$19,951	\$32	\$151	\$359	\$0	\$97	\$2	\$5	\$0	\$276	\$23,357	65.0%		
Operating Costs	\$303,977	\$31,615	\$46,549	\$19,727	\$613	\$154	\$71	\$1,713	\$5,117	\$24,704	\$3,536	\$4,798	\$11,731	\$807	\$7,690	\$180	\$1,431	\$0	\$7,746	\$168,183	55.3%		
Program Services	\$3,219,965	\$10,414	\$304,342	\$173,925	\$0	\$0	\$6,995	\$45,085	\$167,696	\$24,835	\$1,031	\$1,209	\$76,566	\$33,295	\$410,927	\$22,485	\$0	\$0	\$2,090	\$1,280,895	39.8%		
Total Expenditures	\$8,621,316	\$614,274	\$1,042,867	\$496,260	\$29,210	\$8,694	\$7,286	\$70,431	\$240,996	\$297,992	\$28,084	\$125,047	\$271,635	\$37,176	\$495,070	\$32,143	\$76,190	\$0	\$59,797	\$3,933,152	45.6%		
Remaining Available Funds		\$575,316	\$1,045,538	\$309,497	\$60,790	\$0	\$836	\$69,931	\$4	\$435,623	\$36,783	\$38,704	\$770,036	\$1,527	\$947,191	\$112,857	\$87,381	\$150,000	\$46,151	\$4,688,164			
% of Funds Expended by Grant		51.6%	49.9%	61.6%	32.5%	100.0%	89.7%	50.2%	100.0%	40.6%	43.3%	76.4%	26.1%	96.1%	34.3%	22.2%	46.6%	0.0%	56.4%	45.6%			
Expiration Dates		6/30/2026	6/30/2027	6/30/2027	6/30/2026	8/31/2025	9/30/2025	12/31/2026	9/30/2025	9/30/2026	9/30/2026	9/30/2026	6/30/2026	10/31/2025	9/30/2026	6/30/2026	6/30/2026	6/30/2026	6/30/2026	9/30/2026			

CareerSource Suncoast
Non-Federal Funds Cash Bal & Exp Summary
From 7/1/2025 Through 12/31/25

Account Code	Account Title	Debit Balance	Credit Balance
10001	Operating Account	\$447,886.36	
10002	Money Market	\$19,097.02	
10003	Edward Jones - Savings	\$873.03	
10004	ComData - Reloadable Card Fund	\$1,445.09	
10006	CD	\$415,000.00	
Total Cash & CDs		\$884,301.50	
16008	One Stop Housing Investment	156,562.04	
40801	Rev - Other Revenue		\$104,341.90
50001	Accounting & Audit	10,793.85	
50005	Client Support Svcs	5,055.97	
50015	IT Maint & Communication	2,255.40	
50016	Travel & Meetings	3,305.27	
50017	Staff Training	3,875.64	
50020	Office Expense	3,408.87	
50022	Outreach & PR	2,925.00	
50025	Rent - Office & Bldg Exp	6,837.00	
50026	Staff Salaries	26,818.39	
50027	Equip & Furn under \$5k/Unit	5,275.00	
50033	401k Employer Contributions	1,035.58	
50034	Payroll Tax	2,000.79	
50035	Employee Benefits	3,715.06	
50052	Client & Employer Services	4,791.38	
50057	Client Support - reloadable debit cards	382.91	
Total Expenses		\$ 82,476.11	



PERFORMANCE REPORT

Measures	PY2024-2025 2nd Quarter Performance	PY2024-2025 % of Performance Goal Met For Q2	PY2024-2025 3rd Quarter Performance	PY2024-2025 % of Performance Goal Met For Q3	PY2024-2025 4th Quarter Performance	PY2024-2025 % of Performance Goal Met For Q4	PY2024-2025 Performance Goals	PY2025-2026 1st Quarter Performance	PY2025-2026 % of Performance Goal Met For Q1	PY2025-2026 2nd Quarter Performance	PY2025-2026 % of Performance Goal Met For Q2	PY2025-2026 Performance Goals
Adults:												
Employed 2nd Qtr After Exit	88.5	102.91	84.3	98.02	89.7	104.30	86	88.6	103.02	88.7	103.14	86
Median Wage 2nd Quarter After Exit	\$11,178	122.27	\$12,032	131.61	\$11,971	130.94	\$9,142	\$11,971	130.95	\$11,806	129.14	\$9,142
Employed 4th Qtr After Exit	85.9	97.17	85.2	96.38	85.2	96.38	88.4	82.9	93.78	89.7	101.47	88.4
Credential Attainment Rate	82	106.49	71.1	92.34	76	98.70	77	69.5	90.26	72.9	94.68	77
Measurable Skill Gains	78.7	151.64	78.9	152.02	92	177.26	51.9	79.5	153.18	74.6	143.74	51.9
Dislocated Workers:												
Employed 2nd Qtr After Exit	100	120.48	100	120.48	100	120.48	83	85.7	103.25	80	96.39	83
Median Wage 2nd Quarter After Exit	\$10,200	96.23	\$10,302	97.19	\$6,701	63.21	\$10,600	\$12,482	115.57	\$12,482	115.57	\$10,800
Employed 4th Qtr After Exit	66.7	83.38	75	93.75	100	125.00	80	100	125.00	100	125.00	80
Credential Attainment Rate	77.8	155.60	50	100.00	50	100.00	50	50	83.33	50	83.33	60
Measurable Skill Gains	50	64.43	55.6	71.65	81.8	105.41	77.6	90.9	117.14	84.6	109.02	77.6
Youth:												
Employed 2nd Qtr After Exit	88.9	108.41	89.5	109.15	80	97.56	82	81	98.78	77.3	94.27	82
Median Wage 2nd Quarter After Exit	\$8,104	176.56	\$9,287	202.33	\$10,266	223.66	\$4,590	\$11,045	240.63	\$6,348	138.30	\$4,590
Employed 4th Qtr After Exit	80	100.00	81.3	101.63	83.3	104.13	80	94.7	118.38	85	106.25	80
Credential Attainment Rate	40	53.33	37.5	50.00	30	40.00	75	44.4	59.20	77.8	103.73	75
Measurable Skill Gains	76.9	102.53	71.4	95.20	91.2	121.60	75	77.8	103.73	86	114.67	75
Wagner Peyser:												
Employed 2nd Qtr After Exit	69.6	102.81	68.7	101.48	68.9	101.77	67.7	67.5	99.70	66.7	98.52	67.7
Median Wage 2nd Quarter After Exit	\$8,572	128.88	\$8,364	125.76	\$8,764	131.76	\$6,651	\$8,771	131.87	\$8,638	129.87	\$6,651
Employed 4th Qtr After Exit	68.2	107.06	69.2	108.63	68.3	107.22	63.7	66.1	103.77	65.8	103.30	63.7

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



CareerSource Suncoast (CSS) - LWDB 18,
 February 9, 2026 - February 13, 2026
 Preliminary Review Exit Summary

<i>Program</i>	<i>Cases Reviewed</i>	<i>Findings</i>	<i>Other Non-Compliance Issues (ONIs)</i>
Welfare Transition (WT)	29	1	
Supplemental Nutrition Assistance Program - Employment & Training (SNAP E&T)	24		2
Workforce Innovation and Opportunity Act (WIOA) and Special Projects	66	2	5
Rapid Response (RR)			
Wagner-Peyser (WP)	51	1	4
Jobs for Veterans State Grant (JVSG)	35	2	1
Complaint System	35		
Migrant Seasonal Farmworkers (MSFW)	16		2
Board Governance			
Management Process Review		1	
	Totals	7	14

Executive Summary: For the review period of December 1, 2024, to December 31, 2025, programmatic monitoring activities included assessing CSS's program operations, management practices, system protocols, performance outcomes, and internal controls, utilizing FloridaCommerce's programmatic monitoring tools, to determine if CSS operated in compliance with each of the programs' laws, regulations, state and local plans, policies and guidance, and any contract or agreement terms. Monitoring also included sample testing of randomly selected participant case file records from each of the workforce programs reviewed. An acronym list is located at the end of this summary report.

Programmatic and performance issues identified in the report are categorized as findings, issues of noncompliance, and observations based on a scale of high, medium, and low risk probabilities. High, medium, and low risk factors are used to separate issues that present more of a threat to program operations including issues that may potentially impact the fiscal integrity or delivery of services within program operations. While no material issues or weaknesses came to the reviewers' attention other than those contained in the following summary, there is no assurance that other issues do not exist. *NOTE: A voluntary 10-day response period is available following issuance of this summary for CSS to provide additional documentation which may or may not lead to resolution of issues or instances on the final report.*

Corrective Action Plan (CAP): The following general CAP requirements will need to be developed, implemented, and an LWDB response is expected post-issuance of the report to address issues identified below for each Finding, Other Non-Compliance Issue (ONI), and any additional program specific issues identified in the report. The general CAP requirements to be addressed are as follows: copies of updated local operating procedures/policies addressing the requirement; a monitoring schedule showing timeframes activities/services to be monitored; documentation of completed or intended staff training/retraining, including dates, agendas, and roster (as applicable); and written communication to staff regarding the issues.

Common Issue (WIOA, WIOA SP)							
Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions
<p>1. The following is a common issue identified across WIOA, & Special Projects programs.</p> <p>The case file review revealed that CSS's Grievance and Complaint forms, for several participants, did not include the correct name for FloridaCommerce. It was noted that CSS has updated the forms as required by law to include the correct name for filing complaints.</p>	<p><u>FloridaCommerce Memorandum entitled "Welfare Transition Customer Grievance/Complaint Notification" Dated September 14, 2011; TANF State Plan; FloridaCommerce FG 00-004; and 20 CFR 683.600.</u></p>	N/A	N/A	N/A	N/A	Y	<p>CSS must review all files that were opened after the July 1, 2023, name change and determine the number of individuals that signed and received the old forms. Once determined, CSS must document staff's attempts to contact and initiate a new form if the case files are still open and active.</p> <p>CSS RESPONSE:</p>
Totals - Common Issue		0	1	0	0	0	
WT							Total Cases: 24
Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions

1. Two participants identified as victims of domestic violence did not have safety plans developed or the required elements from the safety plan included on the IRP/ARP.	<u>CareerSource Florida F.G. Domestic Violence P27 Section: RWB Service Provider Duties.</u>	N	Y	N/A	N/A	N/A	<p>A safety plan must be developed with the DV victim that specifies alternative requirements that prepare the individual for self-sufficiency while providing for the safety of the individual and the individual's dependents. An individual who is determined to be out of compliance with the ARP/IRP shall be subject to penalties. (If the DV victim states they selected domestic violence, in error on the initial assessment, the LWDB is still required to develop a safety plan for precautionary measures.) required to develop a safety plan for precautionary measures.)</p> <p>CSS RESPONSE:</p>
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Totals - WT		0	1	0	0	0	

SYEP	Total Cases: 5
The review did not reveal any Findings, Other Noncompliance Issues, or Observations.	

SNAP E&T	Total Cases: 24						
Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions

1. Three participants did not have their initial appointment code 590 status code ended within two business days of initial appointment date.	<u>FloridaCommerce Memorandum entitled "Supplemental Nutrition Assistance Program Employment and Training able-bodied Adults without Dependents Initial Engagement Process Changes" dated January 5, 2017.</u>	N/A	N/A	N	Y	N/A	CSS must provide an assurance that the 590 status codes are ended in OSST within two business days of completion of the appointment or no-show. CSS RESPONSE:
2. Two participants were assigned to more than the mandatory work hour requirement.	<u>7 CFR 273.7, 7 CFR 273.24(a)(1)(i), 7 CFR 273.7(e)(2)(i) & (ii); State Plan.</u>	N/A	N/A	N	Y	N/A	CSS must provide an assurance that staff do not assign participants to more than the mandatory work requirement hours per month. CSS RESPONSE:
Totals - SNAP E&T		0	0	0	2	0	

WIOA							Total Cases: 66	
Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions	
Adult/Dislocated Worker (DW)							Cases: 30 (23 Adult/7 DW)	
1. Documentation verifying that supportive services were not available through other	<u>20 CFR 680.900-970; WIOA Sec. 3 (59) and Sec. 134(d)(2); CareerSource Florida Workforce Policy P109 IV.A.</u>	N	Y	N/A	N/A	N/A	CSS must provide documentation to verify that no other resources were available for the funding of the participant's supportive service. CSS	
resources was missing from one participant case files.	<u>and IV.D.2); and Local Supportive Service Policy.</u>						must also provide an assurance that documentation verifying the supportive service was not available through other resources is maintained in the participant's file each time a supportive service is issued. CSS RESPONSE:	

2. Documentation to support the MSG attainment recorded in Employ Florida was missing from three participant case files.	<u>FR Part 677.155 (a)(v); WIOA Section 116; and TEGL 10-16 Change 2 and 14-18.</u>	N/A	N/A	N	Y	N/A	CSS must provide documentation to support the MSGs as recorded in Employ Florida if the cases are still open and active. CSS must ensure that documentation to support MSG attainment is retained in the participant's case file or made available upon request. CSS RESPONSE:
3. Training dates as recorded in Employ Florida for eight participants did not match the documentation retained in the participant's case file.	<u>20 CFR 680.410-420 and .770-840; WIOA Section 122 (b)(1)(D), (b)(4)(A), (a)(3) and 134(c)(3); AP 009 and 90; and TEGL 19-16.</u>	N/A	N/A	N	Y	N/A	CSS must provide an assurance that activity beginning, and end dates are recorded accurately, and timely in Employ Florida. CSS RESPONSE:
Youth		Cases: 18 Out of School					
1. Training dates as recorded in Employ Florida for three participants did not match the documentation retained in the participant's case file.	<u>WIOA Sec. 129(c)(2); Federal Data Validation Requirements TEGL 23-19, change 2.</u>	N/A	N/A	Y	Y	N/A	CSS must provide an assurance that activity beginning, and end dates are recorded accurately, and timely in Employ Florida. CSS RESPONSE:
Special Projects		Cases: 18 (6 Adult/9 DW)					
<ul style="list-style-type: none"> • WIOA-Incumbent Worker-20% Non-Waiver Local Only - Incumbent Worker (3) • 814 - Fostering Opioid Recovery DWG- DW (3) • Hurricane Ian DWG- DW (3) 		<ul style="list-style-type: none"> • Rapid Credentialing 2023- Adult - Adult (3) • Sector-Based Training Initiatives - Adult (3) • Hurricane Helene - DWG- DW (3) 					
1. Credential Documentation was missing from a participant's case file.	<u>Federal Data Validation Requirements TEGL 10-16 Change 3; WIOA Sec. 3(52) and Sec. 116(b)(2)(A).</u>	N	Y	N/A	N/A	N/A	CSS must provide an assurance that Credential documentation is recorded accurately and timely in Employ Florida.

								CSS RESPONSE:
2. Supportive Service (Transportation) activity date recorded in Employ Florida does not match documentation date in one participant's case file.	<u>20 CFR 680.900-970; WIOA Sec. 3 (59) and Sec. 134(d)(2); AP 109; and Local Supportive Service Policy</u>	N/A	N/A	N	Y	N/A		CSS must provide an assurance that activity dates are recorded accurately and timely in Employ Florida. CSS RESPONSE:

3. Occupational Skills Training activity beginning and end dates recorded in Employ Florida do not match the provided ITA in one participant's case file.	<u>20 CFR 680.300,410-420; WIOA Sec. 134(c); AP 90; and TEGL19-16.</u>	N/A	N/A	N	Y	N/A		CSS must provide an assurance that activity beginning and end dates are recorded accurately and timely in Employ Florida. CSS RESPONSE:
Totals - WIOA		0	2	1	5	1		

PERFORMANCE REVIEW COMMENTS

During the performance review of the Dislocated Worker files in which the participants did not meet the negotiated goal for the Median Wage, it was discovered that the region's Dislocated Worker population is small which affects the overall goal when one or two do not meet the metric. It was further discovered some participants had no desire for the Dislocated Worker program because their need was not for further training, it was for securing employment.

During the performance review of the Youth files in which the participants did not meet the negotiated goal for Credential Attainment, it was discovered that these participants were unsuccessful in being employed or enrolled in an education or training program leading to a recognized postsecondary credential within one year following exit. Of the seven Youth participants that did not meet this measure two dropped out of the activity, one transferred to a program that was not on the approved training provider list, three completed the program but either failed the state exam and did not retake it or did not take the licensing exam at all, and one after several documented attempts from the region became unresponsive.

Rapid Response

The review did not reveal any Findings, Other Noncompliance Issues, or Observations.

Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions
WP - General Cases: 45							
<p>1. One employer-entered H-2B job order was not reviewed by CSSF staff and immediately placed on "hold" status in Employ Florida.</p>	<p><u>FloridaCommerce Memorandum entitled "Processing H2-B, Temporary Non-Agricultural Employment Job Orders," dated June 2, 2015.</u></p>	<p>N</p>	<p>Y</p>	<p>N/A</p>	<p>N/A</p>	<p>N/A</p>	<p>CSS must provide documentation of the efforts made by staff to verify with the employer that the H-2B job order identified in the review was approved by USDOL and FloridaCommerce staff if the job order is still open. An assurance must also be provided that CSS will take necessary steps to immediately place all future H-2B job orders on hold and notify FloridaCommerce via email.</p> <p>CSS RESPONSE:</p>
<p>2. Four job seekers had service codes (113 - Job Search Plan, 106 Provided Internet Job Search Support/Training and 114 Staff Assisted Job Search) recorded in Employ Florida were not adequately documented.</p>	<p><u>Employ Florida Service Code Guide for Jobseeker Services.</u></p>	<p>N/A</p>	<p>N/A</p>	<p>N</p>	<p>Y</p>	<p>N/A</p>	<p>CSS must provide an assurance that CSS staff will review and monitor entry of all WP job seeker services in Employ Florida to ensure the services provided fit the description of the service code(s) recorded and are adequately documented.</p> <p>CSS RESPONSE:</p>
<p>3. Five referrals listed on the "Referrals Pending Review" list were not reviewed by staff within 72 hours.</p>	<p><u>FloridaCommerce AP 72 Section IV: Referral for Workers.</u></p>	<p>N/A</p>	<p>N/A</p>	<p>N</p>	<p>Y</p>	<p>N/A</p>	<p>CSS must provide an assurance that staff have or will regularly review the "Referrals Pending Review" to ensure all future referrals to suppressed job orders in Employ Florida are reviewed within 72 hours. An assurance must also be provided that CSS staff will take necessary steps to track,</p>

							document, and increase the frequency of monitoring of pending referrals in Employ Florida. CSS RESPONSE:
4. One employer had a service code (E07 - Remote/Virtual Employer Contact) recorded in Employ Florida that was not adequately documented. Additionally, one of the services was recorded after the 15-day deadline.	<u>Employ Florida Service Code Guide for Employer Services.</u>	N/A	N/A	N	Y	N/A	CSS must provide an assurance that CSS staff will review and monitor entry of all employer services in Employ Florida to ensure the services provided fit the description of the service code(s) recorded and are adequately documented. CSS RESPONSE:
WP/RESEA							Cases: 6
5. Five job seekers' EDPs recorded in Employ Florida were missing specific long and/or short term occupational or educational goals.	<u>Employ Florida Service Code Guide for Employer Services.</u>	N/A	N/A	N	Y	N/A	CSS must provide documentation with the CAP that staff have or will develop and/or update the EDP with clear and specific long-term occupational or educational goals and if the application is still open or the job seeker is still active in Employ Florida. Additionally, CSS must provide an assurance that staff have or will review all future EDP codes recorded in Employ Florida to ensure case notes have been recorded identifying all required elements to the service(s) provided. CSS RESPONSE:
Totals - WP		0	1	0	4	0	

Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions
JVSG Participants							Cases: 15
1. Veteran Intake Screening (service code 159) was not recorded. This is required even for outreach events.	<u>VPL-05-24-JVSG-Staff-Roles-and-Responsibilities.</u>	N	Y	N/A	N/A	N/A	DVOP specialists may not serve individuals who have not been screened for eligibility and entered into the state's MIS. CSS RESPONSE:
2. DVOPZs OA claims QEB is Low Income, but this was not communicated in the 159's case note - not sure if this was missed and if so, how the client got to the DVOP without a recorded QEB.	<u>Employ Florida Service Code Guide for Jobseeker Services.</u>	N	Y	N/A	N/A	N/A	During intake screening, the specific eligibility category must be identified (i.e., significant barrier to employment or special population) and was not in this instance. CSS RESPONSE:
LVER							Cases: 15
3. LVER: No case note was found documenting resume delivery for the E09 Service Code (Delivered Applications/Resumes).	<u>Employ Florida Service Code Guide for Employer Services.</u>	N/A	N/A	N/A	N/A	Y	The case note must include the job order number, name and title of person receiving the applications/resumes, date the documents were delivered, method of delivery (email, U.S. mail, virtually, in person), and the names of the job seekers. CSS RESPONSE:
VR&E							Cases: 5
The review did not reveal any Findings, Other Noncompliance Issues, or Observations.							
Totals - JVSG		0	2	0	0	1	

Complaint System

Cases: 35

The review did not reveal any Findings, ONIs, or Observations.

MSFW

Total Cases: 16

Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions
<p>1. MSFW Service Level Indicators: The Palmetto significant office did not meet the Equity Ratio Indicators and Minimum Service Level Indicators during the review period. The Equity Ratio Indicators not met were the received staff-assisted job search activities; received Unemployment Insurance (UI) claim assistance; referred to Federal training; and received individualized career services. In addition, the office did not meet the Minimum Service Level Indicators of median earnings of MSFWs in unsubsidized employment, individuals placed long term in non-agricultural jobs, and individuals placed in a job.</p>	<p><u>20 CFR 653; FG 03-040; Desk Aid; and FloridaCommerce Agricultural Outreach Plan.</u></p>	Y	N/A	N/A	Y	N/A	<p>CSS must provide documentation of a system or plan to provide MSFWs with the full range of career center services, employment assistance, and referrals. The documentation must also include a process for placing MSFWs in jobs. Additionally, CSS must provide an assurance the MSFW Service Level Indicators Report will be monitored regularly to identify service gaps.</p> <p>Note: FloridaCommerce is actively seeking guidance from the U.S. Department of Labor regarding the enforcement of Equity Ratio Indicators. FloridaCommerce will follow up with CareerSource Florida and Board 18 leadership thereafter.</p> <p>CSS RESPONSE:</p>
<p>2. MSFW Outreach Services- Outreach staff did not conduct extensive follow-up contacts with MSFWs as necessary and appropriate to provide necessary services. Additionally, MSFW quality contact goals were not met during the review period.</p>	<p><u>20 CFR 653; FG 03-040; and WIOA Unified Plan.</u></p>	Y	N/A	N/A	Y	N/A	<p>CSS must provide an assurance that as a significant office, it will take all necessary steps to increase outreach activities to locate and contact the majority of MSFWs in the service areas. The assurance must also include a plan or process for follow-up activities to MSFWs.</p> <p>CSS RESPONSE:</p>

3. MSFW Outreach Reports- Outreach reports did not contain the address of agricultural employers, organizations or agencies visited during outreach activities.	<u>20 CFR 653; FG 03-040; and WIOA Unified Plan.</u>	N/A	N/A	N/A	N/A	Y	<p>CSS must provide an assurance that outreach reports will contain all required information, for reporting purposes. The assurance must also include a plan or process for the review of outreach reports, before they are submitted to FloridaCommerce.</p> <p>CSS RESPONSE:</p>
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Totals - MSFW		2	0	0	2	1	
GENERAL PROGRAM COMMENTS							
During the review, the SMA provided technical assistance to center staff on MSFW Performance Indicators, Complaint System, outreach services and reporting, the Wagner-Peyser Staffing Final Rule, and Employ Florida Service Codes.							

Board Governance
The review did not reveal any Findings, ONIs, or Observations

Management Process Review

1. Documentation supporting the completion of the security access forms for newly hired staff was not available for review.	<u>Grantee/Subgrantee Agreement.</u>	N	Y	N/A	N/A	N/A	<p>CSS must provide documentation of completion of the forms identified for all new hires during the review period. Additionally, CSS must provide documentation of the development and implementation of a system to monitor and ensure the completion of forms during the new hire process for all staff. CSS must also provide an assurance that all future new hire documentation will be completed prior to or at hiring and retained.</p> <p>CSS RESPONSE:</p>
Totals - Management Process		0	1	0	0	0	

Acronyms					
ABAWD	Able Bodied Adults without Dependents	FMA	Bureau of Financial Monitoring and Accountability	OST	Occupational Skills Training
AP	Administrative Policy	FY	Fiscal Year	POS	Priority of Service
CAP	Corrective Action Plan	IEP	Individual Employment Plan	PY	Program Year
CFR	Code of Federal Regulations	IRP	Individual Responsibility Plan	RESEA	Reemployment Services and Eligibility Assessment Program
CSS	CareerSource Suncoast	IT	Information Technology	RR	Rapid Response

DCF	Department of Children and Families	ITA	Individual Training Account	SNAP E&T	Supplemental Nutrition Assistance Program Employment and Training
DVOP	Disabled Veterans Outreach Program	IWT	Incumbent Worker Training	SMA	State Monitor Advocate
DWG	Disaster Recovery Dislocated Worker Grant	JPR	Job Participation Rate	S.M.A.R.T	Specific, Measurable, Attainable, Realistic, and Time-Bound
DW	Dislocated Worker	JVA	Jobs for Veterans Act	SYEP	Summer Youth Employment Program
EDP	Employability Development Plan	JVSG	Jobs for Veterans State Grant	TAA	Trade Adjustment Assistance
EEO	Equal Employment Opportunity	LMI	Labor Market Information	TANF	Temporary Assistance for Needy Families
ES	Employment Service	LVER	Local Veterans Employment Representative	TCA	Temporary Cash Assistance
ETA	Employment and Training Administration	LWDB	Local Workforce Development Board	TEGL	Training and Employment Guidance Letter
F.A.C	Florida Administrative Code	MIS	Management Information System	U.S.C.	United States Code
FCDP	Farmworker Career Development Program	MOU/IFA	Memorandum of Understanding & Infrastructure Funding Agreement	WE	Work Experience
FG	Final Guidance	MSFW	Migrant and Seasonal Farmworker	WFS	Workforce Services
FLC	Foreign Labor Certification	MSG	Measurable Skills Gains	WIOA	Workforce Innovation and Opportunity Act
FLSA	Fair Labor Standards Act	ONI	Other Noncompliance Issue	WP	Wagner-Peyser
FloridaCommerce	Florida Department of Commerce	OSPS	Bureau of One-Stop and Program Support	WSA	Work Search Activity
F.S.	Florida Statutes	OSST	One-Stop Service Tracking	WT	Welfare Transition

***This acronym table reflects all acronyms that have been used in the PY 2025-2026 monitoring review cycle. All acronyms may not be used in this report.**