



Board of Directors Meeting

Thursday, June 25, 2026 - 8:00 a.m. to 9:30 a.m.

Location: 3660 N. Washington Blvd, Sarasota, FL

This is an in-person meeting with virtual or call-in capabilities

[Join the Teams Meeting](#)

Phone 1-786-600-3104

Conference ID: 394 498 472#

AGENDA

Call to Order– David Kraft, Chair

Action Items

- Approval of Consent Agenda – David Kraft
 - Approval of May 28, 2026 Board Meeting Minutes
 - Approval of Local Targeted Occupations List Extension
 - Approval of Revised Policy #05-21 Individual Training Accounts (ITA)
- Approval of PY2026-2027 Budget – Robin Dawson
- Approval of ITA Waiver Request – Robin Dawson
- Approval of Contract Negotiations for Temporary Staffing Services – Christina Witt

CEO Report – Joshua Matlock

Other Business Board

- One-Stop Operator and Education and Industry Consortium Annual Report – Terri Clark, TClark Workforce Solutions, LLC.

Staff Reports

- Kathy Bouchard, CTO
- Anthony Gagliano, COO

Public Comments/Closing Remarks – David Kraft, Chair

Adjournment - David Kraft, Chair

Next Board of Directors Meeting is September 24, 2026

Location: 3660 N. Washington Blvd, Sarasota, FL



Action Items - Consent Agenda

CAREERSOURCE SUNCOAST
Board Meeting Minutes
Virtual TEAMS Meeting and In-person
3660 N. Washington Blvd., Sarasota, FL 34234
Thursday, May 28, 2026
8:00 A.M.

Call to Order:

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

Board Member Updates:

David Kraft provided updates on the following Board Members.

- Resignations
 - Paul Gansemer – Effective May 12, 2026
 - Jane Roseboro – Effective March 15, 2026
- New Board Members
 - Kim Dalglish – Vice President of Membership, Manatee Chamber of Commerce
 - Justin Bellante – CEO/Co-Founder, Titan Placement Group

Action Items:

• **Approval of Consent Agenda – David Kraft**

- Approval of March 12, 2026, Combined Executive Committee and Board of Directors Meeting Minutes
- Approval of Schedule of Operations for PY2026-2027
- Approval of Budget Modification #2 Correction
- Approval of PY2026-2027 Newtown Community Redevelopment Agency Advisory Board Mini-grant Program.

David Kraft requested a motion to approve the consent agenda.

Motion: Lisa Eding

Second: Michael Endee

Motion passed

• **Approval of Slate of Officers 2026-2028 – Christina Witt**

Christina Witt presented the overview of the Nominating Committee recommended slate of Officers for PY2026-2028. Additional nominations were requested; no nominations were made.

David Kraft requested a motion to approve the Nominating Committee's recommended Program Years 2026 and 2027 slate of officers, to be installed at the September 2026 Board of Directors Meeting for two-year terms.

- Chair – Shaun Polasky, Helios Technologies
- Chair Elect – Sarah Tar, PNC Bank
- Treasurer – Lorri Kidder, Carr, Riggs & Ingram

Motion: Kim Dalglish

Second: Lisa Eding

Motion passed

- **Approval of Related Party Agreements**

Christina Witt presented the following ten (10) related party agreements, noting the related party holding the conflict-of-interest, which therefore required approval from the Board of Directors.

1. David Kraft requested motion for the Board of Directors to approve the Galen College of Nursing Related Party Training Provider Agreements (2-Year) with maximum expenditures of \$175,000 for PY 2026-2027 and \$175,000 for PY2027-2028.

Conflict of Interest requiring Board approval was noted as Board Member Kathy Dwyer.

Motion: Allison Imre **Second:** Lisa Eding
Abstain: none (Kathy Dwyer was not in attendance)
Motion passed

2. David Kraft requested motion for the Board of Directors to approve the Suncoast Technical College Related Party Training Provider Agreement (2-Year) with maximum expenditures of \$175,000 for PY 2026-2027 and \$175,000 for PY2027-2028.

Conflict of Interest requiring Board approval was noted as Board Member Michael Endee.

Motion: Lisa Eding **Second:** Kim Dalglish
Abstain: Michael Endee
Motion passed

3. David Kraft requested motion for the Board of Directors to approve the State College of Florida Related Party Training Provider Agreement (2-Year) with maximum expenditures of \$175,000 for PY 2026-2027 and \$175,000 for PY2027-2028.

Conflict of Interest requiring Board approval was noted as Board Member Patricia Rand

Motion: Michael Endee **Second:** Lisa Eding
Abstain: None (Patricia Rand was not in attendance)
Motion passed

4. David Kraft requested a motion for the Board of Directors to approve the Tampa Bay Pipe Trades/JATC Related Party Training Provider Agreement (2-Year) with maximum expenditures of \$175,000 for PY 2026-2027 and \$175,000 for PY2027-2028.

Conflict of Interest requiring Board approval was noted as Board Member Mark Viggiano.

Motion: Lisa Eding **Second:** Kim Dalglish
Abstain: Mark Viggiano
Motion passed

5. Lisa Eding requested a motion for the Board of Directors to approve the Community Coalition on Homelessness, dba, Turning Points Related Party On-the-job Training/Customized Training work-based training agreements with maximum expenditures of \$30,000 for PY 2026-2027.

Conflict of Interest requiring Board approval was noted as Board Member David Kraft.

Motion: Nick Choat **Second:** Shaun Polasky
Abstain: David Kraft
Motion passed

6. David Kraft requested a motion for the Board of Directors to approve the Sun Hydraulics Related Party On-the-job Training/Customized Training Work-based training agreements with maximum expenditures of \$30,000 for PY 2026-2027.

Conflict of Interest requiring Board approval was noted as Board Member Shaun Polasky.

Motion: Allison Imre **Second:** Michael Endee
Abstain: Shaun Polasky
Motion passed

7. David Kraft requested a motion for the Board of Directors to approve the Teak Decking Systems Related Party On-the-job Training/Customized Training worked-based training agreements with maximum expenditures of \$30,000 for PY 2026-2027.

Conflict of Interest requiring Board approval was noted as Board Member Lisa Eding.

Motion: Nick Choat **Second:** Kim Dalglish
Abstain: Lisa Eding
Motion passed

8. David Kraft requested a motion for the Board of Directors to approve the Grapevine Communications Related Party On-the-job Training/Customized Training worked-based training agreements with maximum expenditures of \$30,000 for PY 2026-2027.

Conflict of Interest requiring Board approval was noted as Board Member Allison Imre.

Motion: Sarah Tar **Second:** Lisa Eding
Abstain: Allison Imre
Motion passed

9. David Kraft requested a motion for the Board of Directors to approve the Manatee Chamber Foundation Related Party agreement for outreach and workforce services for \$20,000 for PY2026-2027.

Conflict of Interest requiring Board approval was noted as Board Member Kim Dalglish.

Motion: Michael Endee **Second:** Sarah Tar
Abstain: Kim Dalglish
Motion passed

10. David Kraft requested a motion for the Board of Directors to approve the Bradenton Area EDC Related Party agreement for outreach and workforce services for \$20,000 for PY2026-2027.

Conflict of Interest requiring Board approval was noted as Board Member Craig Warzecha and CSS President/CEO Joshua Matlock

Motion: Kim Dalglish **Second:** Michael Endee
Abstain: Craig Warzecha
Motion passed

CEO Report:

Joshua Matlock provided updates on WIOA Reauthorization, WIOA and State funding allocations for PY2026-2027, CSS organizational goals for PY2026-27, regional apprenticeship collaborations and the Upskill Manatee Initiative MOU signed with the Manatee County Board of County Commissioners to expand apprenticeships in Manatee County.

Finance Report:

Robin Dawson reviewed Budget to Expenditure Reports as of March 31, 2026. Copies of the reports were provided in the agenda packet.

Performance Report

Anthony Gagliano reviewed the CareerSource Suncoast Letter Grade as of 12/31/2025. A copy of the letter grade was provided in the agenda packet.

Staff Reports:

Robin Dawson

Robin Dawson provided a reminder on filing the annual Form 1 financial disclosures by June 30, 2026. Planning allocations for PY2026-2027 were reviewed.

Kathy Bouchard

Kathy Bouchard reported on the migration of the CSS 401k plan from One America to VOYA and benefit renewal cost increases for PY2026-2027. CSS is discussing options with the Florida Workforce Development Association to potentially get a larger discounted group rate for regions across the State to reduce benefit costs.

Anthony Gagliano

Anthony provided updates on the Apprenticeship Works regional event, Care Economy Apprenticeship Accelerator event, Summer Youth Employment Program, Entrepreneurship program updates, Employer engagement, Rural Grant initiatives partnership for adult English language skills courses and the national recognition James Disbro is getting for CSS's work in apprenticeship development.

Public Comments: None

Next Meeting: Board of Directors Meeting is June 25, 2026

Location: 3660 N. Washington Blvd, Sarasota, FL

Board Meeting Adjournment: The meeting was adjourned at 9:11 a.m.

Respectfully submitted,

Joshua Matlock

[Joshua Matlock \(Jun 2, 2026 07:36:58 EDT\)](#)

Josh Matlock
President, CEO

CAREERSOURCE SUNCOAST - BOARD MEETING ATTENDANCE

Absent Present	Board Member
P	Justin Bellante, Titan Placement Group
A	Jim Bos, MBJ Group
A	Ashley Brown, Women’s Resource Center
P*	Will Cromie, Synovus Bank
P	Nick Choat, Sport Clips Haircuts
P	Kim Dalglish, Manatee Chamber of Commerce
A	Kathy Dwyer, Galen College of Nursing
P	Lisa Eding, Teak Decking Systems
P	Michael Endee, Sarasota County School – Suncoast Technical College
P*	Geoffry Gilot, Boys & Girls Clubs
A	Sherod Halliburton, Credit Union1
P*	Allison Imre, Grapevine Communications
A	Heather Kasten, Sarasota Chamber of Commerce
P*	Lorri Kidder, Carr, Riggs, & Ingram, LLC.
P	David Kraft, Vision Consulting Group
A	Anne LeBaron, Take Stock in Children Manatee
P*	Shaun Polasky, Helios Technologies
A	Patrica Rand, State College of Florida
P*	Ericka Randall, Vocational Rehabilitation
P*	Sarah Tar, PNC Bank
P*	Eric Troyer, Kerkering Barberio & Company
P*	Mark Viggiano, Local 123 Plumbers and Pipefitters Union
P*	Craig Warzecha, Bradenton Marauders/Pittsburgh Pirates
P*	Ken Waters, Sarasota Housing Authority
	Staff Present: Josh Matlock, Robin Dawson, Anthony Gagliano, Christina Witt, Kathy Bouchard, Lori Sardinias, Michelle Snyder, James Disbro, Karima Habity*, Nicolas Quinn*, Chet Filanowski*, Curt Preisser*
A	Commissioner Tal Siddique - Manatee County
P*	Commissioner Teresa Mast – Sarasota County

24 Board Members – 17 present, 7 absent

*Virtual

CAREERSOURCE SUNCOAST
Local Targeted Occupations List Extension for PY2026/2027
Board of Directors Summary
June 25, 2026

Background Information:

As part of Workforce Innovation and Opportunity Act (WIOA) implementation, CareerSource Florida Administrative Policy 82 provides guidance for the development of Local Workforce Development Boards' Local Targeted Occupations List (LTOL). The LTOL is a critical tool used to identify high-demand occupations and ensure training resources are aligned with regional workforce needs.

The LTOL is derived from the annual Regional Demand Occupations List (RDOL), which is released by the Florida Department of Commerce and serves as the foundation for identifying occupations eligible for training services funded through WIOA and other workforce programs

Current Situation:

For Program Year (PY) 2026–2027, the Florida Department of Commerce has not yet released the Regional Demand Occupations List (RDOL). As a result, CareerSource Suncoast (CSS) is unable to complete the standard LTOL development process, including stakeholder input, review, and Board approval of an updated list.

Because the LTOL is required to determine priority for training services and to support the Eligible Training Provider List (ETPL), a temporary solution is necessary to ensure continuity of operations and uninterrupted access to training services for participants.

Recommendation / Action:

It is recommended that the Board approve a temporary extension of the currently approved PY2025–2026 Local Targeted Occupations List (LTOL) for use during the first quarter of PY2026–2027.

This extension will:

- Ensure continued alignment of approved Eligible Training Provider programs with approved demand occupations.
- Maintain compliance with WIOA requirements tied to demand occupations.

The current LTOL will be extended and remain in effect through the first quarter of PY2026–2027 (ending September 30, 2026), or until the RDOL is released and a new LTOL is developed and approved, whichever occurs first.

REQUESTED ACTION:

A motion to approve the temporary extension of the PY2025–2026 Local Targeted Occupations List (LTOL) through the first quarter of PY2026–2027, pending development and Board approval of the PY2026–2027 LTOL.

Respectfully submitted,

James Disbro,
Vice President, Strategic Workforce Alignment

**PY 2025-2026 Local Targeted Occupations List
Extension for PY2026-2027**

Workforce Development Area 18 - Manatee and Sarasota Counties

Sorted by Standard Occupational Classification Code

Effective July 1, 2025 - September 30, 2026

SOC Code †	Occupational Title †	HSHW ††	LMEC Training Code †††	Qualifying Level ††††
111021	General and Operations Managers	HSHW	6	R
112021	Marketing Managers	HSHW	6	R
112022	Sales Managers	HSHW	6	R
113012	Administrative Services Managers	HSHW	6	R
113021	Computer and Information Systems Managers	HSHW	6	R
113031	Financial Managers	HSHW	6	R
113071	Transportation, Storage, and Distribution Managers	HSHW	6	N
113121	Human Resources Managers	HSHW	6	S
119021	Construction Managers	HSHW	6	R
119051	Food Service Managers	HSHW	3	R
119111	Medical and Health Services Managers	HSHW	6	R
119141	Property, Real Estate, and Community Association Managers	HSHW	6	R
119151	Social and Community Service Managers	HSHW	6	N
119199	Managers, All Other	HSHW	6	R
131020	Buyers and Purchasing Agents	HSHW	6	S
131031	Claims Adjusters, Examiners, and Investigators	HSHW	3	R
131041	Compliance Officers	HSHW	6	R
131051	Cost Estimators	HSHW	6	R
131071	Human Resources Specialists	HSHW	6	R
131081	Logisticians	HSHW	6	R
131082	Project Management Specialists	HSHW	6	R
131111	Management Analysts	HSHW	6	R
131121	Meeting, Convention, and Event Planners		6	N
131141	Compensation, Benefits, and Job Analysis Specialists	HSHW	6	S
131151	Training and Development Specialists		6	R
131161	Market Research Analysts and Marketing Specialists	HSHW	6	R
131199	Business Operations Specialists, All Other	HSHW	6	R
132011	Accountants and Auditors	HSHW	6	R
132020	Property Appraisers and Assessors	HSHW	6	S
132051	Financial and Investment Analysts	HSHW	6	N
132052	Personal Financial Advisors	HSHW	6	S
132053	Insurance Underwriters	HSHW	6	S
132072	Loan Officers	HSHW	6	S
132099	Financial Specialists, All Other	HSHW	6	N
151211	Computer Systems Analysts	HSHW	6	R
151212	Information Security Analysts	HSHW	6	S
151231	Computer Network Support Specialists	HSHW	5	S
151232	Computer User Support Specialists	HSHW	4	R
151241	Computer Network Architects	HSHW	6	S
151244	Network and Computer Systems Administrators	HSHW	6	R
151251	Computer Programmers	HSHW	6	S
151252	Software Developers	HSHW	6	R
151253	Software Quality Assurance Analysts and Testers	HSHW	6	R
151254	Web Developers	HSHW	5	N
151255	Web and Digital Interface Designers	HSHW	5	N
151299	Computer Occupations, All Other	HSHW	6	R
152031	Operations Research Analysts	HSHW	6	S
152051	Data Scientists	HSHW	6	S
172051	Civil Engineers	HSHW	6	R
172112	Industrial Engineers	HSHW	6	S
172141	Mechanical Engineers	HSHW	6	N
173011	Architectural and Civil Drafters	HSHW	5	S
173031	Surveying and Mapping Technicians		5	S
191042	Medical Scientists, Except Epidemiologists	HSHW	6	N
195011	Occupational Health and Safety Specialists	HSHW	6	S
211018	Substance Abuse, Behavioral Disorder, and Mental Health Counselors		6	R
211021	Child, Family, and School Social Workers		6	R
211023	Mental Health and Substance Abuse Social Workers	HSHW	6	N
211093	Social and Human Service Assistants		3	R
211094	Community Health Workers		6	N

SOC Code †	Occupational Title †	HSHW ††	LMEC Training Code †††	Qualifying Level ††††
211099	Community and Social Service Specialists, All Other		6	N
232011	Paralegals and Legal Assistants	HSHW	5	R
251071	Health Specialties Teachers, Postsecondary	HSHW	6	N
252012	Kindergarten Teachers, Except Special Education	HSHW	6	R
252021	Elementary School Teachers, Except Special Education		6	R
252022	Middle School Teachers, Except Special and Career/Technical Education		6	R
252031	Secondary School Teachers, Except Special and Career/Technical Education	HSHW	6	R
252052	Special Education Teachers, Kindergarten and Elementary School		6	S
252058	Special Education Teachers, Secondary School	HSHW	6	S
253099	Teachers and Instructors, All Other		6	N
271011	Art Directors	HSHW	6	N
271014	Special Effects Artists and Animators	HSHW	6	N
271024	Graphic Designers		6	R
271025	Interior Designers		6	R
272012	Producers and Directors	HSHW	6	N
273031	Public Relations Specialists	HSHW	6	R
273043	Writers and Authors	HSHW	6	R
291126	Respiratory Therapists	HSHW	5	N
291141	Registered Nurses	HSHW	6	R
291292	Dental Hygienists	HSHW	5	R
292010	Clinical Laboratory Technologists and Technicians		5	R
292034	Radiologic Technologists and Technicians	HSHW	5	R
292052	Pharmacy Technicians		4	R
292056	Veterinary Technologists and Technicians		5	R
292057	Ophthalmic Medical Technicians		4	R
292061	Licensed Practical and Licensed Vocational Nurses		4	R
292072	Medical Records Specialists		4	R
292081	Opticians, Dispensing		4	R
292099	Health Technologists and Technicians, All Other		4	R
312011	Occupational Therapy Assistants	HSHW	5	R
312021	Physical Therapist Assistants	HSHW	5	R
319011	Massage Therapists		4	S
319091	Dental Assistants		4	R
319092	Medical Assistants		4	R
319097	Phlebotomists		4	R
332011	Firefighters	HSHW	4	R
333051	Police and Sheriff's Patrol Officers	HSHW	5	R
351011	Chefs and Head Cooks		5	R
371012	First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers		3	R
391014	First-Line Supervisors of Entertainment and Recreation Workers, Except Gambling Services		3	N
391022	First-Line Supervisors of Personal Service Workers		3	R
411011	First-Line Supervisors of Retail Sales Workers		3	R
411012	First-Line Supervisors of Non-Retail Sales Workers	HSHW	3	R
413021	Insurance Sales Agents	HSHW	4	R
413031	Securities, Commodities, and Financial Services Sales Agents	HSHW	6	R
413091	Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel		6	R
414011	Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	HSHW	6	S
414012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	HSHW	3	R
419021	Real Estate Brokers		4	S
419022	Real Estate Sales Agents		4	R
431011	First-Line Supervisors of Office and Administrative Support Workers	HSHW	3	S
433031	Bookkeeping, Accounting, and Auditing Clerks		3	S
433051	Payroll and Timekeeping Clerks		3	S
434031	Court, Municipal, and License Clerks		3	R
434161	Human Resources Assistants, Except Payroll and Timekeeping		5	S
435061	Production, Planning, and Expediting Clerks		3	R
436011	Executive Secretaries and Executive Administrative Assistants	HSHW	3	S
436012	Legal Secretaries and Administrative Assistants		3	S
436013	Medical Secretaries and Administrative Assistants		3	R
439199	Office and Administrative Support Workers, All Other		3	S
471011	First-Line Supervisors of Construction Trades and Extraction Workers	HSHW	3	R
472031	Carpenters		4	R
472111	Electricians		4	R
472152	Plumbers, Pipefitters, and Steamfitters		4	R
474011	Construction and Building Inspectors	HSHW	4	R
491011	First-Line Supervisors of Mechanics, Installers, and Repairers	HSHW	3	R

SOC Code †	Occupational Title †	HSHW ††	LMEC Training Code †††	Qualifying Level ††††
492011	Computer, Automated Teller, and Office Machine Repairers		4	S
492022	Telecommunications Equipment Installers and Repairers, Except Line Installers	HSHW	4	R
492098	Security and Fire Alarm Systems Installers		4	R
493021	Automotive Body and Related Repairers		4	R
493023	Automotive Service Technicians and Mechanics		4	R
493031	Bus and Truck Mechanics and Diesel Engine Specialists	HSHW	4	S
493042	Mobile Heavy Equipment Mechanics, Except Engines	HSHW	4	R
493051	Motorboat Mechanics and Service Technicians		4	R
499021	Heating, Air Conditioning, and Refrigeration Mechanics and Installers		4	R
499041	Industrial Machinery Mechanics	HSHW	4	R
499052	Telecommunications Line Installers and Repairers		4	R
499062	Medical Equipment Repairers	HSHW	5	N
499071	Maintenance and Repair Workers, General		4	L
511011	First-Line Supervisors of Production and Operating Workers	HSHW	3	R
514041	Machinists		4	R
514121	Welders, Cutters, Solderers, and Brazers		4	R
519061	Inspectors, Testers, Sorters, Samplers, and Weighers		4	R
531047	First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	HSHW	3	S
533032	Heavy and Tractor-Trailer Truck Drivers		4	R

†SOC Code and Occupational Title refers to Standard Occupational Classification codes and titles.

††HSHW = High Skill/High Wage = (Mean Wage - \$29.98/hour & Entry Wage - \$19.14/hour).

†††Labor Market Estimating Conference (LMEC Educational Requirements) Training Code:

3 = Some College, No Degree

4 = Post Secondary Non-Degree Award

5 = Associate Degree

6 = Bachelor's Degree

††††Qualifying Level:

L = Meets local review criteria.

R = Meets regional wage and openings criteria based on state Labor Market Statistics employer survey data.

S = Meets statewide wage and openings criteria based on state Labor Market Statistics employer survey data.

N = Meets national wage and openings criteria based on national Labor Market Statistics employer survey data.

Sources: Florida Commerce, Bureau of Labor Market Statistics, 2025-26 Regional Demand Occupations List (RDOL)

CAREERSOURCE SUNCOAST
Policy Approval
Board of Directors Summary
June 25, 2026

Background Information:

CareerSource Florida Administrative Policies are business rules, requirements, processes and responsibilities that expand, explain, or further specify federal or state legislation or policies developed by FloridaCommerce. As CareerSource Florida (CSF) approves new Administrative and/or Strategic Policies, CareerSource Suncoast will review these policies to create or revise existing CSS policy and procedures for proper alignment. FloridaCommerce requires local boards to present all local policies to the Board of Directors for review and approval. Outlined below is one (1) CSS Board Policy for your review and approval.

Summary of Policy Revision:

Individual Training Accounts (ITA)Policy# 05-21

This policy was updated to change references of DEO to FloridaCommerce and include the following language under the “*ITA Limitations*” section of the policy:

“CSS established maximum lifetime Individual Training Account (ITA) limit of \$15,000 per client represents a cap and not an entitlement. Consistent with federal guidance allowing local flexibility in ITA funding decisions, CSS retains the discretion to determine the actual amount awarded to each client based on available funding, program priorities, individual training needs, and cost-effectiveness considerations.

CSS is not obligated to fund up to the maximum limit for each client and may approve ITA awards at levels below the established cap when necessary to ensure the responsible stewardship of public funds and the equitable distribution of training resources across eligible clients. Funding decisions will be made on a case-by-case basis and are contingent upon the availability of funds at the time of approval.”

Requested Action:

A motion that the Board of Directors approve the revised Individual Training Accounts (ITA)Policy# 05-21.

Respectfully submitted,

Christina Witt
Senior Director of Economic Development



Policy # 05-21

Policy: Individual Training Accounts (ITA)	Page 1 of 6
Program: Workforce Innovation and Opportunity Act (WIOA), Welfare Transition (WT), and Special Grants	
Section: Program Operations	
Date of Issuance: 01/27/2022	Revision Date: 6/25/2026
Distribution: CareerSource Suncoast Team Members	

Background

WIOA provides for a workforce system that is accessible to all job seekers, client centered and focused on job-driven training. The workforce system delivers career and training services at the nation's nearly 2,500 American Job Centers. The Adult, Dislocated Worker, and Employment Service programs provide training and employment services in the American Job Center network and are required partners under the law. Under WIOA, partner programs and entities that are jointly responsible for workforce and economic development, educational, and other human resource programs, collaborate to create a seamless client-focused American Job Center network. This network integrates service delivery across all programs to make it easier for workers to access the services they need to obtain skills and employment.

Training services can be critical to the employment success of many adults and dislocated workers. Training services are governed by sections 20 CFR 680.200 through .230 and 20 CFR 680.300 through .350 of the WIOA Final Rule.

Individual Training Accounts (ITAs) are used in the delivery of most training services. The ITA system allows clients the opportunity to choose the training provider that best meets their needs. The CareerSource one-stop system must ensure clients are provided with quality indicators and performance information on providers of training services. Clients must also receive effective career services, case management, and career planning with the ITA used as the primary payment mechanism for training services. ITAs can also support placing clients into registered apprenticeship programs.

Purpose

To establish a CareerSource Suncoast policy for staff issuance of workforce development funded programmatic Individual Training Accounts (ITAs). Policies are to ensure that appropriate and sufficient internal controls are established regarding eligibility, initial issuance, and subsequent issuance. This policy is applicable to the following programs: WIOA Adult, WIOA Dislocated Worker, WIOA Youth, Welfare Transition, and Special Grant funded programs.

Policy

Allocation of Funds:

CSS will allocate a minimum of 50 percent of the Adult and Dislocated Worker formula funds per program year (July-June) to satisfy the federal ITA expenditure requirement when a sliding scale waiver has not been requested and approved by FloridaCommerce. Sliding scale waivers vary per program year and are requested based on the Boards funding levels compared to the previous year's funds.

The percentage allocated for ITA expenditures is calculated using the carry-forward plus the portion of any new allocation budgeted for the current year. The required minimum allocation of 50 percent (or waiver percentage) of funds to be expended in the fiscal year is reflected in the budget that is submitted to CSF.

ITA Guidelines:

ITAs are the primary method used by WIOA, WT and Special Grant funded programs to pay for training services.

Training services for WIOA- eligible clients may be paid for using an ITA. An ITA is a payment agreement between CSS and an approved training provider on the Eligible Training Provider List (ETPL), made on behalf of a WIOA-eligible client. Pursuant to Section 445.003(3)(a)(1), F.S., tuition, books and fees of training providers, and other training services, such as work based learning, authorized by WIOA qualify as ITA expenditures. However, in certain circumstances, such as for on-the-job training, customized training, and registered apprenticeship programs, a training contract from a local employer to a third-party provider may be used to provide training services.

The ITA cost categories are broken down into sub-cost categories, which further specify activities allowable under the ITA. The sub-cost categories for the ITA are:

- Occupational Skills Training (OST)- An organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate, or advanced levels. LWDBs must give priority consideration to training programs that lead to recognized postsecondary credentials that align with in-demand industry sectors or occupations in the local area. The chosen occupational skills training must meet the quality standards in WIOA. The training must:
 - Be outcome-oriented and focused on an occupational goal specified in the Individual Employment Plan (IEP)
 - Be of sufficient duration to impart the skills needed to meet the occupational goal
 - Lead to the attainment of a recognized postsecondary credential
- Work-Based Training (WBT) - Work-based training provides clients the opportunity to attain the skills and qualifications needed to gain employment in a particular industry or occupation. Work-based training is coordinated through collaboration of the CSS Business Services Department and local employers who receive subsidies for clients entering work-based training. Work-based training activities include Customized Training, Incumbent Worker Training (IWT), On-The-Job Training (OJT), and Registered Apprenticeships (RA). Work-based training services are delivered through an employer contract rather than an ITA.
 - On-the-job training, customized training, and incumbent worker training are not subject to the requirements applicable to entities listed on the local ETPL.
 - Except for incumbent worker training, to participate in work-based training, individuals must be determined eligible for the WIOA Adult or Dislocated Worker program.
- Work Based Learning - Work Experiences, Internships, Pre-Apprenticeships and Transitional Jobs are considered Individualized Career Services and are linked to occupations or career pathways. These training activities allow WIOA-eligible clients an opportunity to engage in work experiences where they develop employability skills, acquire job-specific knowledge and gain work experience in an area that helps prepare them for self-sufficient employment.

- Youth enrolled clients must have a combined instructional component of academic and occupational education. The educational component may occur concurrently or sequentially with the work experience. Work-based training services are delivered through an employer contract rather than an ITA. These trainings may include:
 - Programs that combine workplace training with related instruction, and may include cooperative education programs, and registered pre-apprenticeships
 - Training programs operated by the private sector
 - Skill upgrading and retraining
 - Entrepreneurial training
 - Job readiness training in combination with other training activities
 - Adult education and literacy in combination with other training activities

Individual Training Accounts for WIOA, WT, and Special Project Clients will be implemented according to the guidelines outlined below.

Occupational Skills Training ITA Guidelines:

Occupational skills training is defined as an organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate, or advanced levels and leads to a recognized credential.

WIOA, WTP, and Special Grant programs will not automatically support enrollment into Occupational Skills Training. ITA's will be offered to suitable, eligible clients based on the justification of need for training services through their initial assessment and career development plan with a CSS staff member. ITA funding is limited based on CSS's annual budget constraints within programmatic departments and will be offered when appropriate and contingent upon funding availability.

WIOA emphasizes client choice in training provider selection to enable the client to make a responsible and informed decision about where best to receive training. CSS will ensure the Eligible Training Providers List (ETPL) is available for review.

ITA Issuance Criteria:

Below outlines the CSS ITA criteria required for ITA issuance.

- ITAs will be issued to an eligible client only after all necessary assessment, eligibility determined, career planning, and enrollment into an eligible training program has been met
- Education providers, training programs, and costs must be approved by the CSS Board of Directors and listed on the Eligible Training provider List (ETPL)
- Training providers must meet ETPL qualification, and program performance standards as outlined in CareerSource Florida Administrative Policy #90 and any subsequent revision release of this policy.
- Pay for tuition, fees, books, uniforms, and other materials/tools required for a program that leads to a recognized credential
- Training costs, associated with basic literacy training, including but not limited to, adult basic education, GED, and English as a second language
- ITA's are issued for the entire program year. The Training provider will invoice as the client successfully progresses through their training and starts their next set of classes/semester. The client must have a good attendance record, maintain at least a C average (2.0 GPA) and/or satisfactory progress each semester to remain eligible

- ITA's **cannot** be issued for a re-take of courses/classes that the client did not pass. Clients will need to secure alternative funding to pay for the re-take of the failed course/class
- Training programs **must be** full-time, not exceed two years in duration and be directly related to the Regional Targeted Occupations List
- ITA's **cannot** be issued to pay for prerequisite and developmental classes (i.e., refresher courses or prep-courses designed to prepare students for college-level courses)
- ITA's **cannot** be issued to pay for costs associated with outstanding balances on courses/programs that were started prior to WIOA/TANF/Special Grant eligibility determination. Self-enrolled clients can be issued ITA's **ONLY** for classes/courses that the client did not start prior to their CSS program enrollment
- ITA's **cannot** be issued to pay for Soft Skills Training, such as:
 - Development of learning skills
 - Communication skills
 - Interviewing skills
 - Professional conduct, etc.

Work-Based Learning Guidelines:

The following guidelines must be followed regarding work-based training programs.

- Clients must be assessed and be determined to have a skills gap for the OJT position of placement.
- On-the-Job (OJT) training: On-the-Job is defined as training by an employer that is provided to a paid client while engaged in productive work in a job that provides knowledge or skills essential to the full and adequate performance on the job. Reimbursement is provided to the employer of up to 50% of the wage rate of the client for the extraordinary costs of providing the training and additional supervision related to the training. The training is limited in terms of duration as appropriate to the occupation for which the client is being trained.
- Customized Training (including the employer match): Customized training is defined as training that is designed to meet the special requirements of an employer that is conducted with a commitment by the employer to employ an individual on successful completion of the training and for which the employer pays for not less than 50% of the training.

ITA Limitations:

The United States Department of Labor (USDOL) provides maximum flexibility to State and Local Workforce Development Areas (LWDA) in managing Individual Training Accounts (ITA). As a result, the WIOA regulations do not establish procedures for making payments; restrictions on ITA duration; ITA funding caps; or policies regarding exceptions to ITA limits. WIOA left the authority to make those decisions with the State or LWDB's.

CSS limits the amount of ITAs to the cost of training for programs up to two-years, with the exception of the registered apprenticeship programs. The amount of each ITA will be based on the training costs, such as tuition, books, and other required supplies to complete the training program. CSS ITA limitations are set as follows:

- \$15,000 per client maximum lifetime limit
- Two (2) year maximum training program
 - Registered Apprenticeship Programs are excluded from the two-year maximum
- Clients who are enrolled in a two-year training program will divide the \$15,000 limit over the multiple CSS program years in which it falls; Unless the client is self-enrolled, and they are in their final year of training.

- ITAs cannot exceed a maximum lifetime limit of \$15,000 per client without written approval of the President/CEO or the Chief Operating Officer.

CSS established maximum lifetime Individual Training Account (ITA) limit of \$15,000 per client represents a cap and not an entitlement. Consistent with federal guidance allowing local flexibility in ITA funding decisions, CSS retains the discretion to determine the actual amount awarded to each client based on available funding, program priorities, individual training needs, and cost-effectiveness considerations.

CSS is not obligated to fund up to the maximum limit for each client and may approve ITA awards at levels below the established cap when necessary to ensure the responsible stewardship of public funds and the equitable distribution of training resources across eligible clients. Funding decisions will be made on a case-by-case basis and are contingent upon the availability of funds at the time of approval.

All work-based learning/training expenditures for an individual client are included in the \$15,000 per client maximum lifetime limit.

Requests for ITA amounts above the maximum lifetime cap must be approved by the Career Services Manager and submitted in writing with a justification to exceed the maximum lifetime ITA cap to the President/CEO or Chief Operating Officer for approval on a case-by-case basis. The request must be written and approved *prior* to exceeding the maximum lifetime ITA cap.

Guidance on Use of PELL and Other Grant Funds:

WIOA Section 134(c)(3)(B)(i) requires the coordination of training costs with funds available under other Federal programs.

WIOA clients will be required to apply for and establish eligibility for Title IV funds of Higher Education Act of 1965 and other forms of financial aid before an ITA is awarded through www.FAFSA.ed.gov. There may be exceptions to this rule. For example, when an occupational skills training program of choice is not PELL eligible, the client will not be required to apply for the PELL grant.

WIOA Section 134(c)(3)(B) (i) allows for WIOA funds to be used when a client is unable to obtain grant assistance for such services, including Federal Pell Grants established under the Higher Education Act of 1965.

WIOA Section 134(c)(3)(B) (ii) allows for WIOA funds to be used when a client requires assistance beyond the assistance made available under other grant assistance programs, including Federal Pell Grants.

WIOA Section 134(c)(3)(B)(ii) permits a WIOA client to enroll in an eligible training program with WIOA funds while an application for Pell Grant funds is pending. However, pursuant to the WIOA Regulations at § 680.230, the WIOA service provider must make prior arrangements with the eligible training provider and the WIOA client regarding allocation of the Pell Grant if it is subsequently awarded. In that case, the training provider must reimburse the service provider (CSS) the WIOA funds used to underwrite the training for the amount the Pell Grant covers, including any education fees the training provider charges to attend training. WIOA service providers are responsible for ensuring duplicate payments for training program costs are not made with WIOA funds.

In Addition, WIOA Section 134(c)B) (iii) permits the consideration of the full cost of participating in training services, including the cost of dependent care and transportation, and other appropriate costs. The Career Coach will conduct a financial analysis, taking into consideration the full education and related costs incurred for the client to complete the chosen program successfully, to determine the appropriate amount of an ITA issuance. WIOA funds cannot be used to pay necessary support services such as living expenses while enrolled and participating in training. Therefore, there may be cases where Pell would pay those related costs and WIOA would pay for tuition.

State and Local Monitoring:

Services and activities provided under WIOA, TANF and Special Grants must be monitored annually for compliance. FLORIDACOMMERCE conducts an annual programmatic and financial monitoring of the implementation of CSS Board policies and programs. In addition, CSS contracts an independent auditor to review their programmatic and financial practices to ensure the highest level of standards and compliance are met.

Programmatic monitoring will be conducted throughout the program year by CSS's quality assurance team member. This includes the specific review of client records (local & state MIS) while using the current applicable state program monitoring tools. In addition, federal and state guidance and CSS policies and operating procedures will be utilized.

Attachment(s):

None

Authority:

- Workforce Innovation and Opportunity Act of 2014, [Public Law Sections 113-128](#)
- Florida Statutes [Section 445.003\(3\)\(a\)\(1\)](#)
- [CareerSource Florida Administrative Policy #074, Individual Training Account Expenditure Requirements and Waiver Request Process](#)
- [Allowable Programmatic Training and ITA Costs Crosswalk](#)
- CareerSource Florida Administrative Policy #90 [WIOA Eligible Training Provider List](#)

Supersession:

Supersedes and replaces Policy #01-12 R8, Implementation of Individual Training Accounts (ITAs) under WIA and Welfare Transition Programs, and for the Related Eligibility and Performance for Training Providers dated 02/10/2014.

Inquiries:

Any questions about this policy should be directed to the CEO, COO, CFAO and/or their designee.



ACTION ITEMS

PROGRAM BUDGET

Program Year 2026 - 2027

July 1, 2026 - June 30, 2027

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Sarasota, FL 34234

(941) 358-4200



**CareerSource Suncoast
Budget for Program Year 2026-2027**

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CareerSource Suncoast Program Year 2026-2027 Budget Narrative

The Board Leadership team has prepared the budget for CareerSource Suncoast. This narrative will be divided into sections describing our various programs, as follows:

Temporary Assistance for Needy Families (TANF)

The Temporary Assistance for Needy Families (TANF), provides services to recipients of temporary assistance, their children and families, and to low-income persons in danger of entering welfare dependency. The goal of this program is to assist these persons in obtaining employment, leading to self-sufficiency. Clients require intensive services prior to obtaining viable employment as well as transitional assistance to assure job retention and the achievement of self-sufficiency.

Workforce Innovation and Opportunity Act (WIOA)

The Workforce Innovation and Opportunity Act (WIOA) effective July 1, 2015 supersedes the Workforce Investment Act (WIA) of 1998. WIOA is designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy. Three funding sources fall under WIOA – Adult, Dislocated Worker, and Youth. Career Services available in our Career Centers range from intake, assessment of skills, job search and placement assistance, and training services. Training, which is linked to job opportunities in our local area, may be provided through an individual training account (ITA), paid internship, or on-the-job training (OJT) to qualified customers who are not able to find employment. Florida Statutes states at least 50% of Adult and Dislocated Worker funds must be expended on ITAs and their related staff costs.

Requirements for youth funding specify a minimum of 75% of youth funds are to be used for out of school youth 16-24 years of age. FL Commerce received a waiver from USDOL for a 50% minimum for out of school youth. A minimum of 20% of youth funds are to be used toward paid internship or on-the-job training.

CareerSource Suncoast has a full-service high-tech career center in Sarasota. Other locations staffed to serve are in Manatee County and South Sarasota County. These locations will provide a broad range of services to the citizens and businesses in Manatee and Sarasota Counties.

National Emergency Dislocated Worker – Hurricane Helene/Milton

The grant funds temporary jobs to assist with humanitarian aid, clean up and restoration activities in areas affected by Hurricane Helene and Milton. The funds can also be used to provide career services and training to eligible participants. The current award will end September 30, 2026.

National Emergency Dislocated Worker – Fostering Opioid Recovery

The grant funds temporary disaster-relief employment, training, and career services. The project will focus on two classes of eligible individuals who may be served – those affected by the opioid disaster or substance use disorder who may be trained in any occupation or individuals who are not directly affected by the opioid disaster that seek training for and employment in demand occupations - that impact opioid disaster. Funds may also be used to develop strategies that foster recovery from opioid and addiction issues affecting the workforce; participate in local opioid addiction/recovery task forces; and provide technical assistance to human resource professionals on how to deal with issues related to drug addiction and recovery in the workplace. The current award will end December 31, 2026.

CareerSource Suncoast Program Year 2026-2027 Budget Narrative

Network Navigator

These Wagner Peyser 7(b) funds provide staffing for Network Navigators. An Apprenticeship Navigator will focus on expanding apprenticeship opportunities by assisting businesses in establishing registered programs and educating individuals on apprenticeship career paths. Hope Florida Navigators coordinate closely with local Department of Children and Families office to support participants through referral and joint case management, foster employer engagement, and ensure access to specialized services such as job readiness, life skills, and career exploration.

Rapid Response

Funding to provide support for staff engaged in rapid response activities which emphasize layoff aversion activities with local employers.

Non-Custodial Parent Employment Program (NCPEP)

This grant will provide funding to assist non-custodial parents who are unemployed or underemployed and have difficulty meeting child support obligations. The goal of the grant is to become self-sufficient and establish a successful pattern of paying child support. CSS will provide career services, job placement, training and support with a goal to obtain and retain self-sufficient employment.

FL Commerce – Joint Managed Programs

Programs under FL Commerce – Joint Managed Programs are for services delivered by FL Commerce state staff assigned to our local career centers. The Florida Workforce Innovation Act of 2000 gave responsibility for FL Commerce Programs to the local workforce boards.

1. Wagner-Peyser - The basic services provided under this program are employment workshops, referral and placement services to job seekers, reemployment services to unemployment compensation claimants, and recruitment services to employers with job vacancies.
2. Disabled Veterans' Outreach Program (DVOP) & Local Veterans' Employment Representative Program (LVER) – The DVOP & LVER Veterans' programs provide jobs and job training opportunities for veterans and disabled veterans. DVOP and LVER assist veterans through contacts with employers, promote and develop on-the-job training and apprenticeships and various other services applicable to provide maximum employment opportunities for veterans.

Reemployment Services and Eligibility Assessment (RESEA)

A grant from USDOL provides re-employment and eligibility assessments to unemployment compensation claimants. The purpose of the project is to determine the effectiveness of more intensive services (in-person re-employment eligibility assessments) in helping claimants find employment, thereby resulting in shorter claims durations and fewer erroneous payments

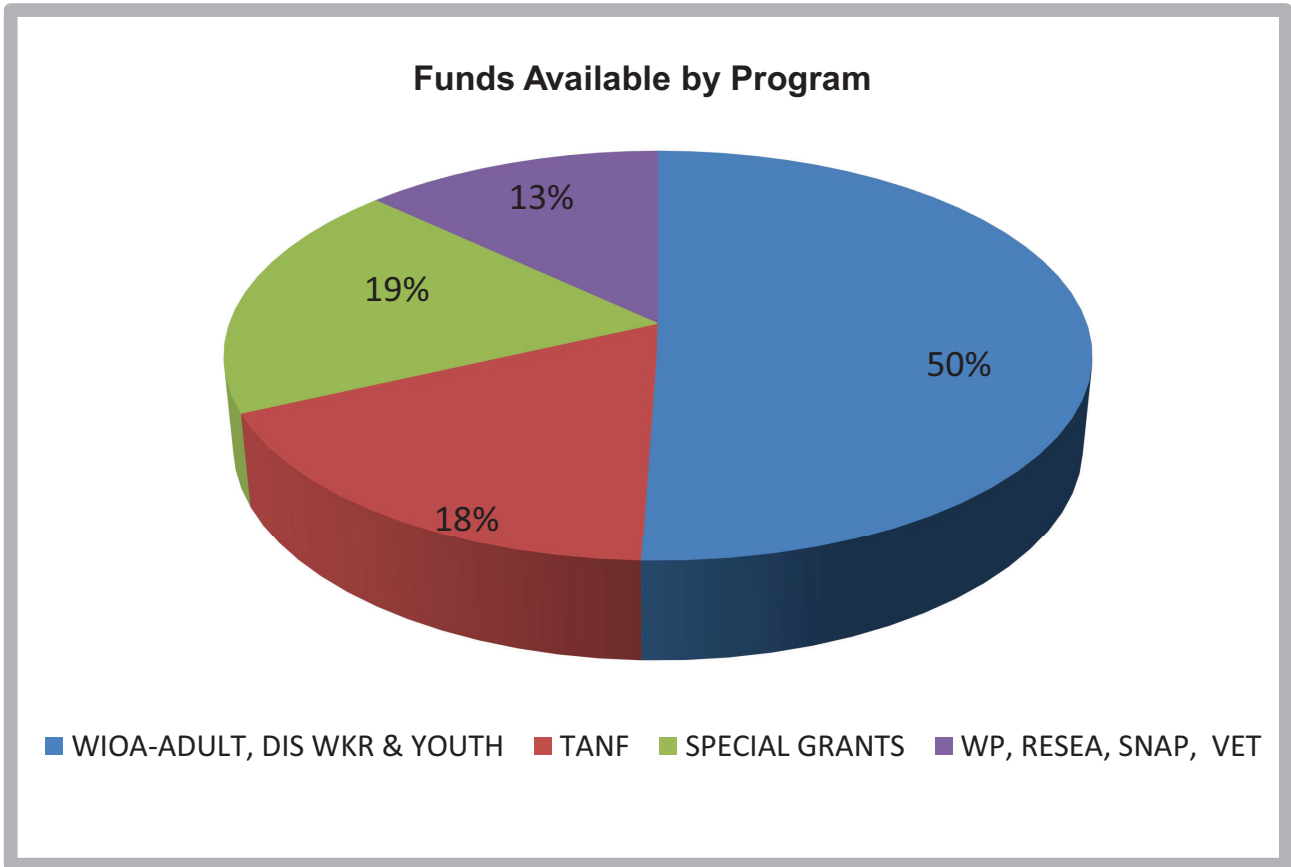
Supplemental Nutrition Assistance Program – Employment and Training (SNAP)

SNAP recipients without dependents receive assistance from CareerSource Suncoast with employment and training services to enable them to become self-sufficient. Beginning January 1, 2016 the State of Florida returned to mandatory participation for SNAP recipients.

**CareerSource Suncoast
Funds Available by Program
Program Year 2026-2027**

PROGRAM	FUNDS AVAILABLE	% OF TOTAL
WIOA-ADULT, DIS WKR & YOUTH	\$3,433,304	50%
TANF	\$1,192,943	18%
SPECIAL GRANTS	\$1,282,297	19%
WP, RESEA, SNAP, VET	\$884,915	13%
TOTAL	\$6,793,459	100%

WIOA ALLOCATION BREAKDOWN	FUNDS AVAILABLE	% OF TOTAL
ADULT/DIS WKR	\$2,271,381	66%
YOUTH	\$1,161,923	34%
TOTAL	\$3,433,304	100%



**CareerSource Suncoast
Summary of Funds Available - All Programs
Program Year 2026-2027
July 1, 2026 - June 30, 2027**

Funding Streams	Funding Available PY 26-27	Less Reserve for PY 27-28	Funding Budgeted For PY 26-27	Mod #2 Funding Budgeted For PY 25-26
Temporary Assistance for Needy Families (TANF) estimate exp 6/30/27	\$1,192,943	\$0	\$1,192,943	\$1,089,534
Temporary Assistance for Needy Families (TANF) Carry Fwd estimate exp 8/31/25	\$0	\$0	\$0	\$100,056
Total Temporary Assistance for Needy Families	\$1,192,943	\$0	\$1,192,943	\$1,189,590
WIOA-Adult & Dislocated Worker estimate exp 6/30/28	\$2,112,501	\$200,000	\$1,912,501	\$1,716,319
WIOA-Adult & Dislocated Worker Carry Fwd estimate exp 6/30/27	\$158,880	\$0	\$158,880	\$372,086
Total WIOA Adult & Dislocated Worker	\$2,271,381	\$200,000	\$2,071,381	\$2,088,405
WIOA-Youth estimate exp 6/30/28	\$1,005,923	\$175,000	\$830,923	\$563,270
WIOA-Youth Carry Fwd estimate exp 6/30/27	\$156,000	\$0	\$156,000	\$242,487
Total WIOA Youth	\$1,161,923	\$175,000	\$986,923	\$805,757
NEG Dislocated Worker Helene Carry Fwd estimate exp 9/30/26	\$62,409	\$0	\$62,409	\$1,442,261
NEG Dislocated Worker Opioid est exp 12/31/26	\$25,708	\$0	\$25,708	\$190,361
Network Navigator WP 7B estimate exp 6/30/27	\$163,571	\$0	\$163,571	\$163,571
Rapid Response estimate exp 6/30/27	\$90,000	\$0	\$90,000	\$90,000
Non-Custodial Parent Employment Program estimate exp 6/30/27	\$940,609	\$0	\$940,609	\$1,041,671
Wagner Peyser 7A estimate exp 9/30/27	\$604,043	\$25,000	\$579,043	\$572,020
Wagner Peyser 7A Carry Fwd estimate exp 9/30/26	\$40,000	\$0	\$40,000	\$161,595
Total Wagner Peyser	\$644,043	\$25,000	\$619,043	\$733,615
Veteran's Programs (DVOP & LVER) estimate	\$74,592	\$0	\$74,592	\$105,948
Reemployment Svcs & Eligibility Assess (RESEA) estimate	\$103,280	\$0	\$103,280	\$163,751
Supple Nutrition Assist Prog Employment & Training (SNAP) est	\$63,000	\$0	\$63,000	\$64,867
Total	\$6,793,459	\$400,000	\$6,393,459	\$8,079,797

CareerSource Suncoast
Budget Comparison PY 26-27 to PY 25-26
Program Year 26-27

	Note Ref	PY 26-27 Budget	PY 25-26 Budget Mod # 2
Funding Available		\$6,393,459	\$8,671,316
Personnel Costs:			
Salaries & Benefits	1	\$4,256,248	\$4,512,858
Staff Training & Education	2	20,000	\$38,919
Total Personnel Costs		\$4,276,248	\$4,551,777
Facility Costs	3	\$505,348	\$512,000
Office Furn & Equip	4	\$27,000	\$35,947
Operating Costs-Career Ctrs & Adm:			
Accounting & Audit	5	\$74,000	\$87,032
Consultants & Legal	6	45,500	53,500
General Insurance	7	61,189	58,836
Office Supplies & Expense	8	33,000	31,609
Travel & Meetings	9	80,000	73,000
Total Operating Costs		\$293,689	\$303,977
Program Services:			
Client Training & Support	10	\$1,145,479	\$3,088,409
Employer & Client Svcs	11	40,000	44,800
Outreach	12	105,694	134,406
Total Program Services		\$1,291,173	\$3,267,615
Totals		\$6,393,459	\$8,671,316

**CareerSource Suncoast
Notes to Comparative Budget Statement
Explaining Budget Line Items
For Program Year 2026-2027**

Note 1 Salaries – Includes positions for Career Services and Board Administration with a cost-of-living salary increase of 2%. Included in this line item is a one-time 2% incentive payment to CSS board staff based on CSS achieving local board performance for PY 25-26 with letter grade of B or better.

	<u>PY 26-27</u>	<u>PY 25-26</u>
CSS F/T Positions	45	48
State Merit & OPS Positions*	<u>8</u>	<u>11</u>
 Total CSS & State Positions	 53	 59

**State merit and OPS positions are not included in CSS budgeted salary/fringe benefit line item. They are paid through the State of Florida as employees of Florida Commerce. We provide supervision and oversight in our career centers for these employees.*

Fringe Benefits - Includes mandatory taxes: social security, medi-care, unemployment compensation, and worker comp insurance. Medical benefits for employees are paid by CSS for a base health plan. Buy-up options will be available with employee contributions. Dental, life, and long-term disability benefits for employees are paid by CSS. A discretionary retirement contribution is paid for eligible employees at 7.5%. The average fringe benefit rate is 38%.

Note 2 Staff Training & Education – Training for staff to include on-site training, opportunities offered by Florida Commerce, and outside sources to be determined.

Note 3 Facility costs are derived from rent, utilities, equipment maintenance, IT maintenance, IT communications, telephone service, and building maintenance for 1 comprehensive career center, 1 smaller career center and 2 satellite offices.

Note 4 Equipment & Furniture - This line item is budgeted for replacement of equipment/furniture needs.

Note 5 Accounting/Audit – Fees for payroll/HR processing services, 401k admin fees, and our maintenance renewal on our accounting and purchasing software, along with costs for our independent CPA audit and IRS 990 return.

Note 6 Consultants & Legal – Includes costs for one stop operator, and legal services.

**CareerSource Suncoast
Notes to Comparative Budget Statement
Explaining Budget Line Items
For Program Year 2026-2027**

- Note 7 General Insurance - This covers insurance for directors & officers, general liability, pension bond, crime, property, electronic equipment, wind, and auto. Worker compensation is listed with fringe benefits.
- Note 8 Office Expense and Supplies – This line item includes costs for dues and subscriptions, incidental expenses, office supplies (for staff and customers), and postage.
- Note 9 Travel & Meetings – Mileage reimbursement (\$0.445 per mile), overnight travel (per diem breakfast \$6, lunch \$11, and dinner \$19), hotel, incidentals, and meeting expenses are reported in this line item. Travel for Board and state employees are paid based on the state limits listed which are below federal allowances.
- Note 10 Client Training – Includes costs for Individual Training Accounts (ITAs) for tuition, books, fees, and supplies, along with on-the-job training (OJT) reimbursements to employers, customized worker training (CWT), and youth paid internships. For training budgets by funding/program refer to Budget by Allocation (pg. 8) in the packet.
- Adult & Dislocated Worker Funds are required to expend 50% on ITAs/OJTs and related expenses. CSS will be applying for an ITA Waiver of 40%. This budget meets the 40% State ITA waiver requirement. Third party ITA payments have not been included in the 40% calculation. As this new process is implemented third party payments will be in addition to the 40% waiver.
- The Youth budget will meet the minimum 50% requirement for out of school youth activities. The training budget for youth also includes an amount for paid internships and on-the-job training to meet the 20% WIOA youth work experience requirement.
- Client Support – Support services are on an individual basis and need. Possible costs may include childcare, housing, required items for employment, and transportation costs.
- Note 11 Employer and Client Services – Employer and client assessment activities and career services.
- Note 12 Outreach – A variety of media is used for educating employers, job seekers, and community on the services offered at CSS. This line item includes \$40,000 in outreach services partnering with the Bradenton Area Economic Development Corporation and Economic Development Corporation of Sarasota County focusing on employers. Additional outreach services include \$40,000 to partner with Local College Access Networks in both counties.

**CareerSource Suncoast
Budget by Allocation
Program Year 2026 - 2027
July 1, 2026 - June 30, 2027**

	BUDGET	TANF	WIOA ADULT & DIS WKR	WIOA YOUTH	NEG HELENE	NEG FOS OPIOID REC	NETWORK NAV	RAPID RESP	NCPEP	WAG PEY	VETS	RESEA	SNAP
Funding Budgeted	\$6,393,459	\$1,192,943	\$2,071,381	\$986,923	\$62,409	\$25,708	\$163,571	\$90,000	\$940,609	\$619,043	\$74,592	\$103,280	\$63,000
Personnel Costs:													
Salaries & Fringe Benefits	\$4,256,248	\$980,823	\$1,470,655	\$713,178	\$58,689	\$22,221	\$162,461	\$88,890	\$441,917	\$136,522	\$22,750	\$97,467	\$60,675
Staff Training & Education	20,000	0	10,000	5,000	0	0	0	0	0	5,000	0	0	0
Total Personnel Costs	\$4,276,248	\$980,823	\$1,480,655	\$718,178	\$58,689	\$22,221	\$162,461	\$88,890	\$441,917	\$141,522	\$22,750	\$97,467	\$60,675
Facility Costs	\$505,348	\$60,129	\$0	\$42,955	\$0	\$0	\$0	\$0	\$40,428	\$321,408	\$40,428	\$0	\$0
Office Furn & Equip	\$27,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$25,000	\$2,000	\$0	\$0
Operating Costs-Career Ctrs & Adm:													
Accounting & Audit	\$74,000	\$12,728	\$26,714	\$9,176	\$1,184	\$1,110	\$1,110	\$1,110	\$7,252	\$9,842	\$1,184	\$1,850	\$740
Consultants & Legal	45,500	7,826	17,791	5,642	728	683	0	0	4,459	6,052	728	1,138	455
General Insurance	61,190	0	0	0	0	0	0	0	0	61,190	0	0	0
Office Supplies & Expense	33,000	5,676	12,903	4,092	528	495	0	0	3,234	4,389	528	825	330
Travel & Meetings	80,000	13,760	31,280	9,920	1,280	1,200	0	0	7,840	10,640	1,280	2,000	800
Operating Costs-Career Ctrs & Adm	\$293,690	\$39,990	\$88,688	\$28,830	\$3,720	\$3,488	\$1,110	\$1,110	\$22,785	\$92,113	\$3,720	\$5,813	\$2,325
Program Services:													
Client Training & Support	\$1,145,479	\$75,000	\$450,000	\$185,000	\$0	\$0	\$0	\$0	\$435,479	\$0	\$0	\$0	\$0
Employer & Client Svcs	40,000	21,000	0	0	0	0	0	0	0	19,000	0	0	0
Outreach	105,694	16,000	52,040	11,960	0	0	0	0	0	20,000	5,694	0	0
Total Program Services	\$1,291,173	\$112,000	\$502,040	\$196,960	\$0	\$0	\$0	\$0	\$435,479	\$39,000	\$5,694	\$0	\$0
Totals	\$6,393,459	\$1,192,943	\$2,071,383	\$986,923	\$62,409	\$25,709	\$163,571	\$90,000	\$940,609	\$619,043	\$74,592	\$103,280	\$63,000

CareerSource Suncoast
Budget Allocated to Program & Administrative Costs
Program Year 2026 - 2027
July 1, 2026 - June 30, 2027

	Total	Program	Administrative
Funding Budgeted	\$6,393,459	\$5,754,113	\$639,346
Personnel Cost:			
Salaries & Fringe Benefits	\$4,256,248	\$3,728,737	\$527,511
Staff Training & Education	20,000	18,800	1,200
Total Personnel Costs	\$4,276,248	\$3,747,537	\$528,711
Facility Costs	\$505,349	\$501,546	\$3,803
Office Furniture & Equipment	\$27,000	\$27,000	\$0
Operating Costs Career Ctrs & Admin:			
Accounting/Audit	\$74,000	\$0	\$74,000
Consultants & Legal	45,500	36,000	9,500
General Insurance	61,189	56,294	4,895
Office Expense & Supplies	33,000	31,500	1,500
Travel & Meetings	80,000	65,000	15,000
Total Operating Costs	\$293,689	\$188,794	\$104,895
Program Services:			
Client Training & Support	\$1,145,479	\$1,145,479	\$0
Employer & Client Services	40,000	40,000	0
Outreach	105,694	105,694	0
Total Program Services	\$1,291,173	\$1,291,173	\$0
Total Budget	\$6,393,459	\$5,756,051	\$637,408
Percentage of Administrative Costs			9.97%

**CareerSource Suncoast
Individual Training Account (ITA) Waiver Request
Board of Directors Approval Summary
June 25, 2026**

SUMMARY:

Section 445.003(3)(a)1, Florida Statutes (F.S.) requires that at least 50% of the Title I Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker funds that are passed through to a local workforce development board (LWDB) be allocated to ITAs, unless an LWDB obtains a waiver from the state workforce development board (CareerSource Florida Board of Directors).

Pursuant to CareerSource Florida Administrative Policy # 074, Individual Training Account Expenditure Requirement and Waiver Request Process, an LWDB must submit an ITA Waiver Request to the Florida Department of Commerce (FloridaCommerce) before July 1st, of the program year for which the waiver will apply. The policy has two options for submitting waiver requests: The Simplified Waiver Option for High Performing LWDBs and The Standard Waiver Option. CSS meets the criteria outlined in the policy to utilize the Simplified Waiver Option.

Simplified Waiver Option:

1. LWDBs eligible for this option must demonstrate all the following:
 - a. An increase in recorded expenditures and/or individuals served in allowable training cost categories, programs and receiving case management services.
 - b. A minimum of 25% (half) of the required 50% state ITA expenditures in WIOA Adult and Dislocated Worker formula funds expended in all allowable training cost categories, programs and receiving case management services.

FloridaCommerce's Bureaus of One-Stop and Program Support and Financial Management will review waiver requests for completeness and consult with CareerSource Florida to determine if waiver approval should be recommended to the state board.

Based on review of CSS current information outlined in the attached ITA Waiver Request, CSS will be submitting approval for a 40% ITA expenditure rate.

REQUESTED ACTION:

A motion to approve CSS to submit an ITA Waiver Request for a 40% expenditure rate to FloridaCommerce for Review and Approval by CareerSource Florida.

Respectfully submitted,

Robin Dawson
Chief Financial and Administrative Officer

Simplified Waiver Request

CareerSource Suncoast

LWDB 18

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

a. Combined Adult/DW Expenses PY 2024	\$1,660,382
b. ITA Expenditures PY 2024 (as reported in SERA) All ITA categories reflected in the 2025 ITA Crosswalk	\$633,067
c. ITA Expenditures as Percentage of Adult/DW Expenses PY 2024	38%
d. ITA Expenditures PY 2024 excluding Training Program and Case Management (and related overhead) expenses	\$389,835
e. Expenditures recorded at d. as Percentage of ITA expenditures PY 2024	62%
f. Number of participants enrolled in the activities listed in the 2025 ITA Crosswalk, including Direct Training Services, Work-based Activities during PY 2024	115

PY 2025 (July 1, 2025 – June 30, 2026) based on current expenditures, obligations, encumbrances, and projections.

a. Combined Adult/DW Expenses PY 2025	\$1,828,803
b. ITA Expenditures PY 2025 (as reported in SERA) All ITA categories reflected in the 2025 ITA Crosswalk	\$784,751
c. ITA Expenditures as Percentage of Adult/DW Expenses PY 2025	43%
d. ITA Expenditures PY 2025 excluding Training Program and Case Management (and related overhead) expenses	\$419,767
e. Expenditures recorded at d. as Percentage of ITA expenditures PY 2025	53%
f. Number of participants enrolled in the activities listed in the 2025 ITA Crosswalk, including Direct Training Services, Work-based Activities during PY 2025	100

The applicant requests a waiver of the ITA expenditure requirement described in Workforce Policy P74.

Requested ITA expenditure waiver (may not be below 30%)	40%
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The LWDB attests that it:

- Will accurately report each month ITA expenditures as described in Workforce Policy P74, TAL, and the 2025 ITA Crosswalk in SERA;
- Will actively work to meet the 50% ITA expenditure requirement;
- Will track its ITA expenditures and training services offered to adult and dislocated worker participants.

CareerSource Suncoast

Name: David Kraft

Title: CareerSource Suncoast Board Chair

Signature: _____

Date: _____

Chief Local Elected Officials

Name: Tal Siddique

Manatee County Commissioner

Signature: _____

Date: _____

Name: Teresa Mast

Sarasota County Commissioner

Signature: _____

Date: _____

**CAREERSOURCE SUNCOAST
RFP 2025-02 Temporary Staffing
Services Board of Directors
Summary June 25, 2026**

Background Information:

Public Noticed on April 3, 2026 - The Suncoast Workforce Board, Inc. d/b/a CareerSource Suncoast (CSS) is issuing a Request for Proposals (RFP) to solicit qualified organizations to provide Temporary Staffing Agency & Payroll Services. Proposal deadline was April 27, 2026. The successful proposer will perform the role of employer of record for participants in temporary employment performing disaster recovery and humanitarian aid work under the National Emergency Dislocated Worker Grant.

Proposal Summary:

A total of two firms submitted proposals. All proposals were found responsive based on CSS staff review. The proposal were reviewed and rated by CSS Staff, Robin Dawson, Kathy Bouchard, and Christina Witt. Non-Conflict of Interest Statements were signed and on file prior to the rating of the proposals.

Each proposal was reviewed and ranked independently. The summary of each firm's ranking and points (alpha order):

<u>Firm</u>	<u>Ranking</u>	<u>Points</u>
Advance Talent Solutions	2	287
Catalyst QLM	1	297

Based on the results, Catalyst QLM ranked the highest. CSS staff recommend engaging in contract negotiations with Catalyst QLM for Temporary Staffing Services with an option to renew up to four additional one-year periods beyond the completion of the original agreement.

Requested Motion:

Requesting a motion for the Board of Directors to approve CareerSource Suncoast to begin Contract negotiations with Catalyst QLM for temporary staffing services.

Respectfully submitted,

Christina Witt, Senior Director of Economic Development



CEO REPORT

Joshua Matlock



OTHER BOARD BUSINESS



CareerSource Suncoast One-Stop Operator Annual Report Program Year 2025-2026

July 1, 2025 – June 30, 2026

Executive Summary: TClark Workforce Solutions, LLC. (TClark) continued to serve as the One-Stop Operator (OSO) for CareerSource Suncoast (CSS) throughout Program Year 2025-2026. In accordance with Workforce Innovation and Opportunity Act (WIOA) requirements and the contracted scope of work, TClark facilitated collaboration among mandated one-stop partners, coordinated partner engagement activities, monitored Infrastructure Funding Agreement (IFA) compliance, convened quarterly partner and consortium meetings, reviewed customer satisfaction data, and promoted workforce system alignment across Manatee and Sarasota Counties.

Throughout the program year, the One-Stop Operator focused on strengthening partnerships, increasing communication among workforce stakeholders, supporting CSS staff apprenticeship expansion efforts, and identifying emerging workforce trends impacting the region.

One-Stop Partner Engagement

The One-Stop Operator successfully convened quarterly One-Stop Partner meetings to promote collaboration, information sharing, and coordination among mandated partners.

Meeting Participation:

Meeting discussions focused on:

- Infrastructure Funding Agreements (IFAs)
- Apprenticeship opportunities and workforce initiatives
- Wrap-around services and referral coordination
- Veteran services and financial literacy programs
- Community events and recruitment activities
- Staffing trends and employment opportunities
- CareerSource Suncoast operational updates, CSS staff provided updates

These meetings provided a forum for partners to share resources, identify service gaps, and improve outcomes for shared customers.

Education and Industry Consortium Activities

The Education and Industry Consortium continued to serve as an important connection point between employers, educational institutions, workforce professionals, and CareerSource Suncoast.

Meeting Participation:

Topics discussed throughout the year included:

- Labor market and economic outlook data
- Workforce shortages and underemployment
- Sector-specific workforce needs
- Apprenticeship expansion opportunities provided by CSS staff
- Career and Technical Education alignment
- Industry advisory activities
- Emerging technologies and artificial intelligence
- Transportation and logistics workforce needs
- Workforce readiness and employability skills
- Employer engagement strategies

The EIC Committee also reviewed workforce data and industry trends impacting healthcare, manufacturing, construction, finance, information technology, transportation, and logistics sectors.

Workforce and Economic Trends

Throughout the year, employers and educational partners identified several workforce challenges and opportunities:

Workforce Challenges

- Continued low unemployment rates coupled with high underemployment rates.
- Rising housing and living costs impacting workforce recruitment and retention.
- Transportation and logistics industries experiencing workforce shortages due to retirements.
- Increased demand for technology, automation, and AI-related skills.
- Employers seeking stronger connections with workforce and educational partners.

Workforce Opportunities

- Continuing expansion of Registered Apprenticeship Programs (RAPs).
 - Increased use of competency-based and online workforce training.
 - Continue supporting CSS in experiential learning opportunities including internships and apprenticeships.
 - Strong support for workforce and education partnerships.
-

Apprenticeship and Workforce Innovation provided by CareerSource Suncoast Staff

Apprenticeship remained a recurring focus throughout Program Year 2025-2026.

Key initiatives included:

- Promotion of Registered Apprenticeship Programs within the Suncoast Workforce Region.
 - Expansion planning for additional apprenticeship pathways.
 - Apprenticeship Accelerator initiatives through CareerSource Suncoast. CSS hosted Apprenticeship Event in April and Apprenticeship Accelerator in June.
 - Ongoing collaboration among employers, educational institutions, and workforce partners to develop earn-and-learn opportunities.
-

Customer Satisfaction Surveys

Customer satisfaction remained strong throughout the year.

Q1 Results

- 90% of customers indicated they were likely or highly likely to refer others to CareerSource Suncoast or use services again.

Q2 Results

- 100% of responding employers indicated they were likely to use CareerSource Suncoast for future workforce needs.
- 88% of customers indicated they would recommend services or return for future assistance.

Q3 Results

- Customer feedback remained positive with clients expressing appreciation for coaching and career guidance services.
- Employers reported positive staff interactions while identifying opportunities to simplify service navigation.

Overall, customer feedback reflects a high level of satisfaction with services provided by CareerSource Suncoast and its workforce partners.

Strategic Accomplishments

During Program Year 2025-2026, the One-Stop Operator successfully:

- Facilitated quarterly One-Stop Partner meetings.
- Convened quarterly Education and Industry Consortium meetings.
- Maintained engagement with mandated partners and EIC committee members.
- Supported implementation and monitoring of Infrastructure Funding Agreements and MOUs.
- Promoted workforce system collaboration and resource sharing of events hosted by CSS.
- CSS Staff advanced apprenticeship and workforce development initiatives. CSS staff provided apprenticeship updates at Partner and EIC meetings.
- Reviewed customer satisfaction data and continuous improvement opportunities.
- Supported workforce alignment between employers, educators, and community partners.

Respectfully Submitted,

A handwritten signature in cursive script that reads 'Terri Clark'.

Terri Clark
TClark Workforce Solutions, LLC.
One-Stop Operator, CareerSource Suncoast



STAFF REPORTS

- Kathy Bouchard, VP/CTO
- Anthony Gagliano, VP/COO

WORKFORCE DEVELOPMENT IN THE CARE ECONOMY AND BEYOND:

***Challenges, Gaps, and Strategic
Opportunities***



Executive Summary

The care economy is a rapidly growing field in which trained professionals support individuals faced with physical, mental and societal challenges. The U.S. Bureau of Labor Statistics expects an average of 16% growth over the next ten years across the youth development, peer support and substance use disorder and mental health counseling fields. The question for workforce development boards is how to engage in this growing field.

The National Association of Workforce Boards (NAWB), as a leader in the workforce development system, assists its members to align and scale registered apprenticeship efforts across regions. NAWB is partnering with FHI 360's National Institute for Work and Learning (NIWL) on an Apprenticeship Building America, Round 2 (ABA2) grant, funded by the U.S. Department of Labor (DOL), to strengthen, modernize, expand, and diversify Registered Apprenticeship Programs (RAPs) in the care economy. [The Promising Leaders Apprenticing in the Care Economy Hub](#) created under the ABA2 grant, is addressing the workforce needs of this evolving industry sector.

Workforce development systems—particularly in sectors under the care economy such as behavioral health, addiction services, and advanced manufacturing—face persistent structural challenges that limit their effectiveness. Key barriers include misalignment between education and employer needs, fragmented funding and governance systems, regulatory constraints, and weak cross-sector collaboration. This brief provides workforce development boards (WDBs) with an overview of the care economy landscape, the emerging workforce challenges, and the strategic role WDBs can play—both individually and in partnership with employers, educational institutions, and economic development organizations. It highlights labor market realities, outlines Registered Apprenticeship-based solutions, and presents real-world examples of successful regional collaboration. For WDBs, proactive engagement with employers is not only a solution to talent shortages but also a competitive advantage in a rapidly expanding sector.

Insights from practitioner discussions highlight that successful workforce initiatives depend less on creating new programs and more on **aligning existing systems, strengthening partnerships, and shifting toward skills-based, employer-informed pathways**. Without structural coordination, even well-funded initiatives struggle to achieve scale or sustainability. The guidance and recommendations included in this brief are built on the experiences of several local workforce development boards. NAWB is very appreciative to:

- James Disbro, Senior Director, Regional Alignment & Programs Development, CareerSource Suncoast, Florida
- Gina Caronna, President & CEO, The Workforce Connection, IL
- Jennifer Serino, Director, Lake County Workforce Development Board, IL

The Growing Importance of the Care Economy

The Care Economy is a rapidly growing field in which trained professionals support individuals faced with physical, mental, and societal challenges. The U.S. Bureau of Labor Statistics expects an average of 16% growth across the youth development, peer support, and substance use disorder and mental health counseling fields from 2023 to 2033. The NIWL ABA2 initiative, funded by the DOL, is the only apprenticeship grant focused on youth development, mental health, and expanding care economy careers for those with lived experience (such as recovery from substance-use disorder). Promising Leaders Apprenticing in the Care Economy Hub creates affordable pathways to entry, incorporates the voices of lived experiences, and provides opportunities to earn while learning in care economy professions. These include pre-apprenticeship curriculums and four apprenticeship pathways. Four (4) apprenticeship programs have been developed and include:

- [Youth Development Practitioner \(YDPA\)](#)
- [Community Health Worker](#)
- [Substance Use Disorder and Mental Health Counselor](#)
- [Peer Support Specialist](#)

In addition, pre-apprenticeship curricula focused on mental health and youth development have been developed.

Challenges and Solutions to Meet the Needs of the Care Economy

Conversations with local workforce development boards that provide work-based training (especially apprenticeships) highlighted the challenges and barriers that many local WDBs are facing while also identifying potential solutions to address these challenges.

➤ Sector-Specific Constraints: Peer Support Specialist Workforce

The behavioral health and addiction recovery workforce illustrates the complexity of workforce development in highly regulated environments. Workforce development in the care economy requires **integration with existing systems**, not parallel program creation. Programs developed in isolation are unlikely to succeed due to regulatory and operational realities.



Care Economy Apprenticeships

Apprenticeship roles and what they prepare participants to do

- Youth Development Practitioner (YDPA)**
Equips apprentices with skills crucial to youth serving fields such as intake counseling, afterschool programming, outreach work, justice reentry, and more.
- Community Health Worker (CHW)**
Provides apprentices with the skills to promote healthy behaviors, advocate for health needs within a community, and liaise with healthcare providers and agencies to support overall wellness.
- Substance-use Disorder and Mental Health Counselor (SUD-MHC)**
Trains apprentices in an alternative, rewarding career path into mental healthcare that consists of instruction and practical experience in counseling skills.
- Peer Support Specialist (PSS)**
Credentialed individuals who have life-altering lived experience of psychiatric, substance use, or other challenges; have made a personal commitment to their own recovery and are trained to use what was learned from their own lived experience to assist others with similar challenges.

Potential Challenges include:

- **Regulatory barriers:** Insurance requirements impose strict experience and credentialing standards, limiting entry pathways.
- **Operational constraints:** High caseloads and staffing shortages reduce capacity for training and supervision.
- **Training limitations:** Traditional models such as On-the-Job Training (OJT) and Work Experience (WEX) are difficult to implement due to:
 - Required supervision ratios
 - Compliance requirements
 - Risk management concerns

Program Design Challenges in Local Workforce Systems

- Efforts to design workforce programs reveal a consistent disconnect between training systems and employer needs.
 - **Educational misalignment:** Training programs often fail to reflect real-world job requirements.
 - **Credential inflation:** Increasing educational requirements create barriers without improving job readiness.
 - **Fragmentation:** Workforce boards, colleges, and employers operate under separate mandates.
- **Structural Tension** - Community colleges and workforce boards often compete rather than collaborate due to:
 - Different funding streams
 - Distinct accountability metrics
 - Governance misalignment
- Systemic Collaboration Failures in Education and Training - A recurring theme highlighted by the workforce boards interviewed included the lack of coordinated strategy across education and workforce systems.

Notable Solutions

CareerSource Suncoast (CareerSourceSC) in Sarasota, FL utilizes labor market data to identify key growth areas and, as a result, began working with educational institutions and employers in the disaster recovery and opioid occupational areas. In addition, CareerSourceSC has worked to train county administrators which has led to the implementation of county incentives to broaden the reach of apprenticeship programs.

Workforce Connection in Rockford, IL, connected with an employer-led apprenticeship program—developed in partnership with post-secondary institutions and approved by the Illinois Board of Higher Education—that demonstrates that **industry-driven design improves outcomes**.

The Lake County Workforce Board in IL emphasized the importance of WDBs as a central hub for stakeholders involved in work-based training. Through WDBs, employers can be connected with apprenticeship opportunities, and collaboration with educational institutions can be encouraged by providing an understanding of the connection between academic training and workforce development. The Lake County Workforce Board has engaged in the care economy through an apprenticeship expansion grant, which included hiring a specialist focused on this area and participating in international knowledge.

Partnership and Accountability Misalignment - Multi-stakeholder workforce initiatives face significant coordination challenges.

Core Issues and Barriers

- **Conflicting metrics:** Different organizations measure success differently (e.g., enrollments vs. job placements).
- **Funding silos:** Separate funding streams discourage integration.
- **Operational complexity:** Managing partnerships requires continuous alignment across stakeholders.
- **Inefficient funding allocation:** Grants are distributed across institutions without enforced collaboration.
- **Inconsistent program quality:**
 - For-profit training programs are often more expensive and restrictive
 - Credit-based programs may be more accessible but slower to adapt
- **Weak enforcement mechanisms:** Collaboration requirements in grants are often nominal rather than operational.

Positive Model - Sustained, informal collaboration mechanisms may be more effective than formal mandates alone. Effective partnerships require:

- Shared metrics
- Unified goals
- Integrated accountability frameworks

Lake County Workforce Board addressed the issue of frequent leadership changes and existing internal training programs. The WDB adopted an approach to supporting young people through pre-apprenticeship training and onboarding, including partnerships with high schools and initiatives like bringing employers into schools to discuss entry-level job opportunities. They also launched a program with City of Hope cancer treatment center that allows high school students to work in the hospital's kitchen as an introduction to the healthcare environment.

Workforce Connections addressed challenges such as insurance regulations and busy workloads as they put into place programs to train peer support specialists in addiction and mental health. The WDB understands that effective workforce development in the care economy requires strong partnerships with existing players in these fields rather than developing programs in isolation. Workforce Connections also joined a regional task force that created a mental health

board and included the regional economic development agency. The Task force understood the complexity of the mental health field and focused on career pathways in mental health care.

CareerSource Suncoast has put into place initiatives that educate employers on the benefits of utilizing apprenticeship programs and how this strategy increases an employer's ROI. In addition, CareerSource Suncoast has worked to strengthen the regional collaboration related to training and hiring and has hosted numerous regional events. These efforts have led to local workforce boards recognizing the opportunities before them and the issues they can address in their local business community.

Frequent policy changes—regardless of political leadership—undermine long-term program stability and effectiveness.

Rethinking Education-to-Work Pathways - Traditional linear education pathways are increasingly misaligned with labor market needs.

Identified Gaps

- Degrees do not consistently signal job readiness
- Employers struggle to articulate required skills
- Learners lack clear, flexible pathways to employment

Emerging Approach: Skills-Based Pathways

A more effective model includes:

- Modular learning across multiple platforms:
 - Community colleges
 - Online education providers
 - Industry certifications
- Employer-defined skill requirements

Shifting from **credential-based to skills-based systems** improves transparency and alignment.

Lake County Workforce Development Board worked with FHI 360 to bring the Youth Development Practitioner Apprenticeship Program to Lake County, resulting in nearly 20 apprentices over three years. The initiative emphasized the importance of sharing resources and making direct connections with intermediaries who understand specific challenges.

Strategic Direction for Workforce Development

Workforce Development Boards serve as critical intermediaries between employers, job seekers, educators, and public funding systems. Their mission is to ensure that workforce investments align with regional economic needs while creating pathways to family-sustaining employment. WDBs are uniquely positioned to:

- Analyze labor market data to identify current and emerging skill needs.
- Convene employers, training providers, and economic development partners.
- Leverage public funding to offset training costs for businesses.
- Support incumbent worker upskilling and career advancement.

Key Strategic Priorities

1. Shift to Skills-Based Frameworks

- Define competencies required for specific roles
- Align training providers to those competencies

2. Strengthen Industry Partnerships

- Engage employers as co-designers of curriculum
- Utilize industry organizations (e.g., National Coalition of Certification Centers (NC3)) to standardize training

3. Simplify System Navigation

- Create clearer pathways linking:
 - Skills → Training → Credentials → Jobs
- Reduce duplication across programs

4. Align Incentives and Metrics

- Develop shared success measures across:
 - Education providers
 - Workforce boards
 - Employers

5. Improve Coordination Mechanisms

- Establish regular cross-sector convenings
- Encourage informal collaboration alongside formal structures

6. Focus on Implementation Capacity

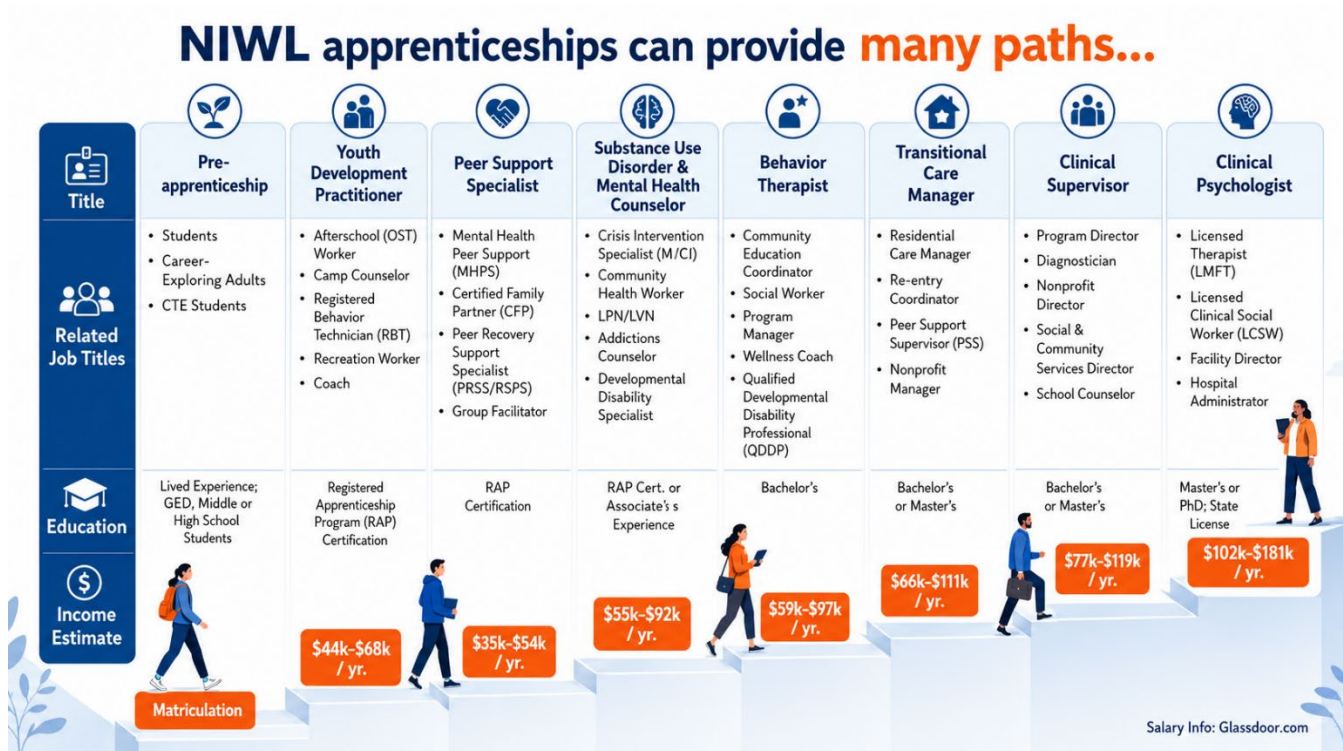
- Invest in implementation, not just program design
- Ensure local institutions have the resources and incentives to deliver

Registered Apprenticeships as a Scalable Solution

Registered Apprenticeships are emerging as one of the most effective tools for addressing care economy workforce shortages. They combine paid, on-the-job learning with structured instruction, allowing businesses to develop talent aligned with their specific technologies and processes.

Pre-Apprenticeships and Early Talent Pipelines - Pre-apprenticeship programs can introduce care economy concepts within high school healthcare and human resources curricula. These programs build awareness while reducing onboarding time for employers.

Utilizing Existing Registered Apprenticeships - NIWL has care economy apprenticeships developed and approved by the USDOL Office of Apprenticeship. Rather than creating entirely new programs, WDBs can efficiently and effectively meet the growing needs of employers, educational institutions and other partners by bringing to the discussions the ability to move forward quickly by engaging with [The Promising Leaders Apprenticing in the Care Economy Hub](#) and their approved apprenticeships.



Conclusion

Current workforce development systems are constrained less by lack of funding or innovation and more by **structural fragmentation and misalignment**. The most effective path forward is not the proliferation of new programs, but the **integration and alignment of existing systems around shared, skills-based goals**.

Sustainable progress will depend on:

- Strong employer engagement
- Coordinated governance
- Clear accountability structures
- Practical, flexible pathways for learners

Without these shifts, workforce initiatives will continue to struggle to achieve scale, relevance, and long-term impact.

Resources:

NAWB Apprenticeship Webpage
<https://www.nawb.org/registered-apprenticeship-resource-hub/>

<https://www.nawb.org/registered-apprenticeship-resource-hub/>

NIWL's Apprenticeships Resource Hub

<https://niwl.fhi360.org/apprenticeships/>

DOL Office of Apprenticeship

<https://www.dol.gov/agencies/eta/apprenticeship>

Federal Resources Playbook

<http://www.doleta/oa/federalresources/playbook/pdf>

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