



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

THURSDAY JUNE 26, 2025

9:30 A.M.

The Landing at MIA
5 Star Conference Center (Everglades Room)
7415 Corporate Center Drive, Suite H
Miami, FL 33126

The public may choose to view the session online via Zoom. **Registration is required:**
https://us02web.zoom.us/webinar/register/WN_wjgmIoTtSEu4r3ERRDichg

AGENDA

1. Call to Order and Introductions
2. Public Comment
3. Chairman's Report
4. Executive Director's Report
 - A. Executive Director Update
5. Community Presentation
6. Consent Agenda Items
 - A. Recommendation as to Approval of April 17, 2025 Board Minutes
7. Executive Committee Update
 - A. Information – Executive Committee Approvals
8. Finance and Efficiency Council Update
 - A. Information – Financial Report – April, 2025

9. Global Talent and Competitiveness Council Update

10. Performance Council Update

11. Action Items

- A. Recommendation as to Approval of the Related Party Training Vendor
- B. Recommendation as to Approval of a New Apprenticeship Training Program
- C. Recommendation as to Approval of a New Training Provider and New Programs for an Existing Provider
- D. Recommendation as to Approval of the 2025-2026 American Job Center Schedule
- E. Recommendation as to Approval of Revisions to the Balanced Scorecard

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"Members of the public shall be given a reasonable opportunity to be heard on a specific agenda item, but must register with the agenda clerk prior to being heard."



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

DATE: 6/26/2025

AGENDA ITEM NUMBER: 2

AGENDA ITEM SUBJECT: PUBLIC COMMENT

AGENDA ITEM TYPE: **INFORMATIONAL**

RECOMMENDATION: N/A

STRATEGIC GOAL: **STRONG WORKFORCE SYSTEM LEADERSHIP**

STRATEGIC PROJECT: **National leader in an ROI-focused enterprise**

BACKGROUND:

N/A

FUNDING: N/A

PERFORMANCE: N/A

NO ATTACHMENT



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

DATE: 6/26/2025

AGENDA ITEM NUMBER: 3

AGENDA ITEM SUBJECT: SFWIB CHAIRMAN'S REPORT

AGENDA ITEM TYPE: **INFORMATIONAL**

RECOMMENDATION: N/A

STRATEGIC GOAL: **STRONG WORKFORCE SYSTEM LEADERSHIP**

STRATEGIC PROJECT: **National leader in an ROI-focused enterprise**

BACKGROUND:

N/A

FUNDING: N/A

PERFORMANCE: N/A

NO ATTACHMENT



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

DATE: 6/26/2025

AGENDA ITEM NUMBER: 4A

AGENDA ITEM SUBJECT: SFWIB EXECUTIVE DIRECTOR'S REPORT

AGENDA ITEM TYPE: **INFORMATIONAL**

RECOMMENDATION: N/A

STRATEGIC GOAL: **STRONG WORKFORCE SYSTEM LEADERSHIP**

STRATEGIC PROJECT: **National leader in an ROI-focused enterprise**

BACKGROUND:

N/A

FUNDING: N/A

PERFORMANCE: N/A

NO ATTACHMENT



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

DATE: 6/26/2025

AGENDA ITEM NUMBER: 5

AGENDA ITEM SUBJECT: COMMUNITY PRESENTATIONS

AGENDA ITEM TYPE: **INFORMATIONAL**

RECOMMENDATION: N/A`

STRATEGIC GOAL: **BUILD DEMAND-DRIVEN SYSTEM W/ EMPLOYER ENGAGEMENT**

STRATEGIC PROJECT: **Engage employers and seek continuous feedback**

BACKGROUND:

FUNDING: N/A

PERFORMANCE: N/A

NO ATTACHMENT



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

DATE: 6/26/2025

AGENDA ITEM NUMBER: 6

AGENDA ITEM SUBJECT: CONSENT AGENDA ITEMS

AGENDA ITEM TYPE: **APPROVAL**

RECOMMENDATION: SFWIB staff recommends to the Board to approve the following items by unanimous consensus, as set forth below.

STRATEGIC GOAL: **HIGH ROI THROUGH CONTINUOUS IMPROVEMENT**

STRATEGIC PROJECT: **Strengthen workforce system accountability**

BACKGROUND:

N/A

FUNDING: N/A

PERFORMANCE: N/A

ATTACHMENT



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD MEETING

DATE: 6/26/2025

AGENDA ITEM: 6A

AGENDA TOPIC: MEETING MINUTES

SOUTH FLORIDA WORKFORCE INVESTMENT BOARD MEETING MINUTES

DATE/TIME: April 17, 2025, 9:30am

LOCATION: The Landing at MIA, 5-Star Conference Center
7415 Corporate Center Drive, Suite H
(Key Biscayne Room)
Miami, FL 33126

Zoom: https://us02web.zoom.us/webinar/register/WN_wjgmIoTtSEu4r3ERRDichg

1. **CALL TO ORDER:** Chairman Gibson called to order the regular meeting of the South Florida Workforce Investment Board at 9:34AM on April 17, 2025.

ROLL CALL: 25 members; 13 required; 19 present: Quorum

SFWIB Members Present	SFWIB Members Absent	SFWIB Staff
<ol style="list-style-type: none">1. Brecheisen, Bruce2. Brown, Clarence3. Canales, Dequasia (Zoom)4. Chi, Joe (Zoom)5. Clayton, Lovey6. Datorre, Roberto (Zoom)7. del Valle, Juan-Carlos, Vice Chair8. Ferradaz, Gilda9. Garza, Eddie10. Gibson, Charles, Chair11. Grice, Sonia12. Loynaz, Oscar, MD13. Mantilla, Rene'14. Perez, Andy (Zoom)15. Pintado, Kirenica16. Rod, Denis17. Rolle, Andrei (Zoom)18. Scott, Jr., Kenneth	<ol style="list-style-type: none">20. Bridges, Jeff21. Glean-Jones, Camela22. Androver, Bernado23. Gazitua, Luis24. Piedra, Obdulio SFWIB Members Excused <ol style="list-style-type: none">25. Palacios, Carol	<ol style="list-style-type: none">1. Beasley, Rick2. Bennett, Renee3. Morgan, Ebony4. Parson, Robert5. Perrin, Yian6. Petro, Basil7. Smith, Robert8. Vice, Karlisha9. Washington, Jarvis SFWIB Administration <ol style="list-style-type: none">10. Gonzalez, Yoandy11. McFarland, Casandra Miami-Dade County Attorney's Office <p>Gallo, Melissa</p>



19. Whitaker, David (Zoom)		
Guest Attendees		
<ol style="list-style-type: none">1. Alexis, Carl, Youth Co-Op, Inc.2. Daes, Monica, Youth Co-Op, Inc.3. Cambronne, Robert, Youth Co-Op, Inc.4. Fleurine, Elou, Youth Co-Op, Inc.5. Gonzalez, Joel, Youth Co-Op, Inc.6. Gutierrez, Maria, Miami-Dade County Public Schools7. Lanuza, Ivania, Miami-Dade County Public Schools8. Mitchell, Carlena, Miami-Dade County Public Schools9. Reboucas, Felipe, Youth Co-Op, Inc.10. Perez-Borroto, Connie, Youth Co-Op, Inc. (Zoom)11. Sanchez, Alfred, Greater Miami Chamber of Commerce (GMCC)		

Agenda items are displayed in the order they are discussed.

2. Public Comments

Public comments should be two minutes or less.

The Executive Office has not received any requests to speak.

Chairman Gibson opened the floor for comments from the public. None were presented.

Item closed.

4A. Executive Directors Report

Chairman Gibson introduced the item; Mr. Beasley provided an overview of the following items in the Executive Director's Report:

- **Federal**
 - **Appropriations** – FY 2025 Continuing Resolution
 - **Trump Administration – US Department of Labor Appointments**
 - The Honorable Lori Chavez-DeRemer, U.S. Secretary of Labor
 - Appointments awaiting confirmation:
 - Mr. Henry Mack III, Employment and Training Administration (ETA)
 - Mr. David Keeling, Occupational Safety and Health Administration (OSHA)



- **Prioritizing Evidence for the Workforce Development Act:** Amends the Workforce Innovation and Opportunity Act (WIOA) to require state workforce boards to prioritize funding for evidence-based job programs with proven positive outcomes.
- **State**
 - Reimagining Education and Career Help (REACH) Act Letter Grades – 2nd Quarter

No questions or comments were presented. Item closed.

5. Presentation – “The Future of Work”- Center for Workforce and Economic Opportunity: Greater Miami Chamber of Commerce

Chairman Gibson introduced the item; Mr. Beasley provided a brief introduction to the project conducted by the Federal Reserve Bank of Atlanta, in partnership with the Center for Workforce and Economic Opportunities, specifically the "Future of Work" survey. Mr. Alfred Sanchez, CEO of the Greater Miami Chamber of Commerce, was invited to present the survey results and discuss areas of concern which could possibly drive changes to existing policies that will mitigate and/or shift the trajectory of some of the more alarming patterns noted throughout the project.

The discussion centered on the evolving nature of work and its implications for the workforce. Mr. Sanchez pointed out that 92% of jobs now require a basic understanding of digital technology, while only 8% of positions do not necessitate any technological skills. Although AI is becoming increasingly significant in the workplace, experts predict that it will complement human work rather than completely replace it. The future of work is anticipated to be more gig-oriented, with fewer long-term career opportunities and a greater emphasis on continuous skill development and adaptability.

Mr. Beasley discussed various collaborations with organizations such as the United Way, the Beacon Council, the Greater Miami Chamber of Commerce, the Children's Trust, the Children's Movement, and CSSF. These groups are coming together to address the barriers currently faced by the workforce and to propose legislation aimed at better supporting the community. Mr. Sanchez also indicated that a study is being conducted in partnership with Florida International University (FIU) to examine the impact of current immigration policies on the workforce. Additionally, another survey will be released in 12 months to assess the long-term effects of these immigration policies.

No further questions or comments were presented. Item closed.



5B. Presentation: CSSF Service Code Monitoring Report *(Item #6 on the agenda)*

Chairman Gibson introduced the item; Mr. Beasley provided a brief overview of the circumstances that led to the development of the CSSF Service Code Monitoring Report. Since the report's development, staff reviewed additional data and found questionable service code utilization and cost concerns, finding that several centers reported high activity on accounts without the corresponding improvements in employment outcomes.

Following this, Mr. Washington demonstrated the report, diving into its various fields to highlight the enhanced real-time functionalities available to monitor performance and ensure compliance.

No questions or comments were presented. Item closed.

[Agenda items have been numbered incorrectly; the following agenda item should be designated as item 6: Consent Agenda Items. This discrepancy has been noted and officially add to the record.]

6. Consent Agenda Items *(Item #7 on the agenda)*

Chairman Gibson introduced the following consent agenda items for review:

- 6A: Approval - SFWIB Meeting Minutes – February 20, 2025 *(Item #7A on the agenda)*

Motion: Vice Chairman del Valle to approve SFWIB Meeting Minutes – February 20, 2025 as so presented. Mr. Brown seconded the motion; **item is passed without dissent.**

No further questions or comments were presented. Item closed.

7. SFWIB Executive Committee Update *(Item #8 on the agenda)*

Chairman Gibson introduced and presented the following updates from the March 13, 2025 and April 10, 2025 SFWIB Executive Committee Meetings:

March 13, 2025

- Career and Workforce Subcommittee Update
- Items Approved in the Executive Committee meeting: Aviation Workforce Services Provider, New Fiber Optics Training Programs; Funding of the associated Fiber Optics Training cohort, and the 2023-2024 agency-wide audit results.



April 10, 2025

- Worker Adjustment and Retraining Notification (WARN): A number of WARN notices have been received by CSSF staff. An estimated 1,144 workers have been affected by layoffs, particularly in the hotel and food service industries.
- WIOA Performance Analysis – Will be discussed by the Performance Council.
- Florida Scorecard Comparison - Will be discussed by the Performance Council.
- Florida Workforce Legislative Bills 681 & 541
- CSSF Service Code Monitoring Tool

8. SFWIB Finance and Efficiency Council Update *(Item #9 on the agenda)*

Chairman Gibson introduced the item; Mr. Scott provided an overview of the topics discussed during today's SFWIB Finance and Efficiency Council Meeting. One item is scheduled for approval in the Action Items section of the agenda: the contract renewal for BCA Watson Rice, the independent external auditor, for the program years 2024-2025.

No questions or comments were presented. Item closed.

9. SFWIB Global Talent and Competitiveness Council Update *(Item #10 on the agenda)*

Chairman Gibson introduced the item; Ms. Ferradaz provided an overview of the items discussed and approved during today's Performance Council meeting. Three items will be presented for review, consideration, and approval during the Action Items section of the agenda.

No questions or comments were presented. Item closed.

10. SFWIB Performance Council Update *(Item #11 on the agenda)*

Chairman Gibson introduced the item; Ms. Canales provided an overview of the items discussed during today's SFWIB Performance Council meeting.

No questions or comments were presented. Item closed.



11. Action Items *(Item #12 on the agenda)*

Chairman Gibson introduced agenda items 11A–11E, allowing CSSF staff to review each item with the members and address any questions presented.

11A. Approval – New Fiber Optics Training Programs *(Item #12A on the agenda)*

Chairman Gibson introduced the item; Mr. Beasley presented the recommendation from the Executive Committee to approve two new Fiber Optics Training programs.

Motion: by Mr. Scott to approve the two Fiber Optics Training programs. Mr. Garza seconded the motion; **item is passed without dissent.**

No further questions or comments were presented. Item closed.

[Mr. Beasley announced a related party item is being presented for board consideration. Dr. Oscar Loynaz was removed from the room prior to the discussion and vote for item 11B. A completed Conflict of Interest/Related Party Form was completed in advance of the meeting.]

11B. Funding Allocation for Fiber Optics Installer Training Cohort *(Item #12B on the agenda)*

Chairman Gibson introduced the item; Mr. Beasley presented the recommendation from the Executive Committee to allocate an amount not to exceed \$86,000 in Workforce System funding for a Fiber Optics Installer Training cohort with Miami Dade College.

Motion: by Mr. Datorre to approve the funding of Mas Tec Fiber Optics Training Program cohort. Ms. Canales seconded the motion; **item is passed without dissent.**

No further questions or comments were presented. Item closed.

[Dr. Loynaz returned to the meeting.]

11C. Approval – Contract Renewal for External Independent Auditing Firm *(Item #12C on the agenda)*

Chairman Gibson introduced the item; Mr. Beasley presented the recommendation from the Finance and Efficiency Council to renew the contract with BCA Watson Rice, LLP for PY 2024-2025 external auditing services.



Mr. Beasley explained that this is the final extension before a new request for proposals next year.

Motion: by Mr. Brecheisen to approve the contract renewal for BCA Watson Rice, LLP. Mr. Scott seconded the motion; **item is passed without dissent.**

No further questions or comments were presented. Item closed.

11D. Approval – New Registered Apprenticeship Programs
(Item #12D on the agenda)

[Mr. Beasley announced the removal of Dr. Oscar Loynaz from the room in preparation for the discussion and vote for item 11D. There is no contract associated with the agenda item, as such, a Conflict of Interest/ Related Party Form is not required.]

Chairman Gibson introduced the item; Mr. Beasley presented the recommendation from the Global Talent and Competitiveness Council to approve the addition of three new apprenticeship programs as listed below:

- Award Excellence Training Institute Apprenticeship Program – GNJ (2025-FL-131124)
- Electrician (RAPIDS Code 0159)
- Miami Dade College Apprenticeship Program GNJ (2018-FL-71114) - Central Sterile Processing Technician (RAPIDS Code 1133CB)
- Sanitas Apprenticeship Program INJ (2023-FL-117116 - Medical Assistant (RAPIDS Code 1085CB)

Motion: by Mr. Brown to approve the addition of the three apprenticeship programs as so listed. Mr. Garza seconded the motion; **item is passed without dissent.**

No further questions or comments were presented. Item closed.

[Dr. Loynaz returned to the meeting.]

11E: Approval - Career Advancement Program (CAP) Work Activities Policy
(Item #12E on the agenda)

Chairman Gibson introduced the item; Mr. Beasley presented the recommendation from the Global Talent and Competitiveness Council to approve the Career Advancement Program Work Activities Policy, which aims to ensure compliance.



Motion: Mr. Brown to approve the Career Advancement Program (CAP) Work Activities Policy. Ms. Pintado seconded the motion; **item is passed without dissent.**

No further questions or comments were presented. Item closed.

Next Meeting

The next SFWIB meeting is scheduled to take place on June 26, 2025 which will include the Workforce Services RFP process and PY 2025-2026 annual budget. The location is to be determined.

Notifications will be forwarded to all members in advance of the session.

Being as there were no further questions or concerns, the SFWIB Meeting adjourned at 10:49am.



COMPLETED RELATED PARTY
FORMS FROM
MAY 8, 2025
SFWIB EXECUTIVE
COMMITTEE MEETING

CONTRACT INFORMATION FORM

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

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

Identification of all parties to the contract: The SFWIB and Technology Trade Group, Inc dba Atlantis University

Contractor Name & Address: Technology Trade Group, Inc dba Atlantis University, 1011 Sunnybrook Rd 10th Floor, Miami FL 33136

Contractor Contact Phone Number: (305) 377-8817

Contract Number or Other Identifying Information, if any: WS-TVA-25-62-00

Contract Term: July 1, 2025 to June 30, 2028

Value of the Contract with no extensions or renewals exercised: Based on ITA

Value of the Contract with all extensions and renewals exercised Based on ITA

Description of goods and/or services to be procured: Training Program

Method of procurement for the goods and/or services to be procured : Florida Commerce Training Provider List

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

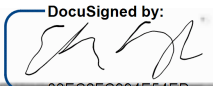
The nature of the conflicting interest in the contract: Atlantis University employee and SFWIB member

The board member or employee with the conflict of interest did X did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract. **If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.**

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

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

I certify that the information above is true and correct.

<p>DocuSigned by:</p>  <p>83EC2FC994E54ED...</p> <p>Signature of Board Chair / Vice Chair*</p>	<p><u>Charles A. Gibson</u></p> <p>Print Name</p> <p><u>6/2/2025</u></p> <p>Date</p>
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* Must be certified and attested to by the board's Chair or Vice Chair.

DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

I, Carol Palacios, a board member / an employee of the board (circle one) hereby disclose that I, myself / my employer / my business / my organization / OR "Other" (describe) _____

_____ (circle one or more) could benefit financially from the contract described below:

Local Workforce Development Board: South Florida Workforce Investment Board dba CareerSource South Florida

Contractor Name & Address: Technology Trade Group, Inc dba Atlantis University; 1011 Sunnybrook Rd 10th Floor, Miami FL 33136

Contractor Contact Phone Number: (305) 377-8817

Description or Nature of Contract: Training Programs - WS-TVA-25-62-00 TBD

Description of Financial Benefit*: None

For purposes of the above contract the following disclosures are made:

The contractor's principals** / owners***: (check one)

X have no relative who is a member of the board or an employee of the board; OR

_____ have a relative who is a member of the board or an employee of the board, whose name is: _____

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



Signature of Board Member/Employee

Carol Palacios

Print Name

05/13/2025

Date

* "Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative. ** "Principal" means an owner or high-level management employee with decision-making authority. *** "Owner" means a person having any ownership interest in the contractor.

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

CONTRACT INFORMATION FORM

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

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

Identification of all parties to the contract: The SFWIB and Miami Dade College

Contractor Name & Address: Miami Dade College

Contractor Contact Phone Number: (305) 237-6000

Contract Number or Other Identifying Information, if any: WS-TVA-25-59-00

Contract Term: July 1, 2025 to June 30, 2028

Value of the Contract with no extensions or renewals exercised: based on ITA

Value of the Contract with all extensions and renewals exercised based on ITA

Description of goods and/or services to be procured: Training Program

Method of procurement for the goods and/or services to be procured: Florida Commerce Training Provider List

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: Dr. Oscar Loynaz, Campus President

The nature of the conflicting interest in the contract: High-level employee of MDCPS

The board member or employee with the conflict of interest X did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract. **If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.**

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

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

I certify that the information above is true and correct.

DocuSigned by:



83EC2FC994E54ED...

Signature of Board Chair / Vice Chair*

Charles A. Gibson

Print Name

6/2/2025

Date

* Must be certified and attested to by the board's Chair or Vice Chair.

DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

I, Dr. Oscar Loynaz, a board member / an employee of the board (circle one) hereby disclose that I, myself / my employer / my business / my organization / OR "Other" (describe) _____

_____ (circle one or more) could benefit financially from the contract described below:

Local Workforce Development Board: South Florida Workforce Investment Board d/b/a CareerSource South Florida _____

Contractor Name & Address: Miami Dade College _____

Contractor Contact Phone Number: (305) 237-6000 _____

Description or Nature of Contract: Training Programs - WS-TVA-25-59-00 _____

Description of Financial Benefit*: None _____

For purposes of the above contract the following disclosures are made:

The contractor's principals** / owners***: (check one)

X have no relative who is a member of the board or an employee of the board; OR

_____ have a relative who is a member of the board or an employee of the board, whose name is: _____

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

Dr. Oscar Loynaz
Signature of Board Member/Employee

SIGN HERE

Dr. Oscar Loynaz
Print Name

DATE HERE

5/13/2025
Date

* "Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative. ** "Principal" means an owner or high-level management employee with decision-making authority. *** "Owner" means a person having any ownership interest in the contractor.

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

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

Identification of all parties to the contract: The SFWIB and The School Board of Miami Dade County

Contractor Name & Address: The School Board of Miami Dade County, 1450 NE 2 Ave, Miami FL 33132

Contractor Contact Phone Number: (305) 995-1000

Contract Number or Other Identifying Information, if any: WS-TVA-25-60-00

Contract Term: July 1, 2025 to June 30, 2028

Value of the Contract with no extensions or renewals exercised: based on ITA

Value of the Contract with all extensions and renewals exercised: based on ITA

Description of goods and/or services to be procured: Training Program

Method of procurement for the goods and/or services to be procured: Sole Source - MDCPS

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

The nature of the conflicting interest in the contract: High-level employee of MDCPS

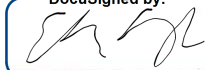
The board member or employee with the conflict of interest X did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract. **If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.**

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

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

I certify that the information above is true and correct.

DocuSigned by:



83EC2FC994E54ED...

Signature of Board Chair / Vice Chair*

Charles A. Gibson

Print Name

6/2/2025

Date

* Must be certified and attested to by the board's Chair or Vice Chair.

DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

I, Rene Mantilla, a board member / an employee of the board (circle one) hereby disclose that I, myself / my employer / my business / my organization / OR "Other" (describe) _____

_____ (circle one or more) could benefit financially from the contract described below:

Local Workforce Development Board: South Florida Workforce Investment Board dba CareerSource South Florida

Contractor Name & Address: The School Board of Miami Dade County: 1450 NE 2 Ave, Miami FL 33132

Contractor Contact Phone Number: (305) 995-1000

Description or Nature of Contract: Training Programs - WS-TVA-25-60-00

Description of Financial Benefit*: None

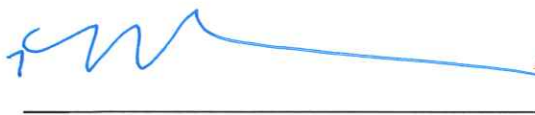
For purposes of the above contract the following disclosures are made:

The contractor's principals** / owners***: (check one)

X have no relative who is a member of the board or an employee of the board; OR

_____ have a relative who is a member of the board or an employee of the board, whose name is: _____

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



SIGN HERE

Signature of Board Member/Employee

Mr. Rene Mantilla
Print Name

DATE HERE

5/14/25
Date

* "Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative. ** "Principal" means an owner or high-level management employee with decision-making authority. *** "Owner" means a person having any ownership interest in the contractor.

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

CONTRACT INFORMATION FORM

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

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

Identification of all parties to the contract: The SFWIB and The Academy of South Florida, Inc. 3721 NW 7th Street, Suite 3721-1, Miami, FL 33126.

Contractor Name & Address: The Academy of South Florida, Inc. 3721 NW 7th Street, Suite 3721-1, Miami, FL 33126

Contractor Contact Phone Number: (305) 985-0835

Contract Number or Other Identifying Information, if any: WS-TVA-25-62-00

Contract Term: July 1, 2025 to June 30, 2028

Value of the Contract with no extensions or renewals exercised: Value based on ITA

Value of the Contract with all extensions and renewals exercised Value based on ITA

Description of goods and/or services to be procured: Workforce Services: WIOA Training Vendor

Method of procurement for the goods and/or services to be procured : Florida Commerce TPL

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: Mr. Andre "Andy" Perez


The nature of the conflicting interest in the contract: Brother of the President

The board member or employee with the conflict of interest X did not did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract. **If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee abstained from voting.**

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

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

I certify that the information above is true and correct.

<p>DocuSigned by:</p>  <p>83EC2FC994E54ED...</p> <p>Signature of Board Chair / Vice Chair*</p>	<p><u>Charles A. Gibson</u></p> <p>Print Name</p> <p><u>6/2/2025</u></p> <p>Date</p>
--	---

* Must be certified and attested to by the board's Chair or Vice Chair.

DISCLOSURE AND CERTIFICATION OF CONFLICT OF INTEREST IN A CONTRACT

I, Andre "Andy" Perez, a board member / an employee of the board (circle one) hereby disclose that I, myself / my employer / my business / my organization / OR "Other" (describe) _____
(circle one or more) could benefit financially from the contract described below:

Local Workforce Development Board: South Florida Workforce Investment Board d/b/a CareerSource South Florida

Contractor Name & Address: The Academy of South Florida, Inc. 3721 NW 7th Street, Suite 3721-1, Miami, FL 33126

Contractor Contact Phone Number: (305) 985-0835

Description or Nature of Contract: Workforce Services: WIOA Training Vendor - WS-TVA-25-62-00

Description of Financial Benefit*: None

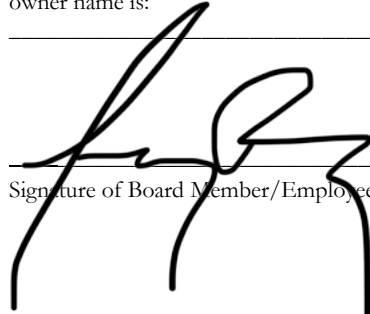
For purposes of the above contract the following disclosures are made:

The contractor's principals** / owners***: (check one)

X have no relative who is a member of the board or an employee of the board; OR

_____ have a relative who is a member of the board or an employee of the board, whose name is:

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



Signature of Board Member/Employee

Mr. Andre "Andy" Perez
Print Name

May 22, 2025
Date

* "Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative. ** "Principal" means an owner or high-level management employee with decision-making authority. *** "Owner" means a person having any ownership interest in the contractor.

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



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

DATE: 6/26/2025

AGENDA ITEM NUMBER: 7

AGENDA ITEM SUBJECT: SFWIB EXECUTIVE BOARD UPDATE

AGENDA ITEM TYPE: **INFORMATIONAL**

RECOMMENDATION: N/A

STRATEGIC GOAL: **STRONG WORKFORCE SYSTEM LEADERSHIP**

STRATEGIC PROJECT: **Strengthen workforce system accountability**

BACKGROUND:

The following items were discussed and/or approved at the June 12, 2025 SFWIB Executive Board Meetings.

Approval of Youth Out of School Workforce Service Providers

1. The Executive Committee approved the selection and authorization for staff to contract with three Out of School Youth Providers who were successful in scoring above 80% on their RFP submission
 - Adults Mankind scored 94.75
 - Community Coalition scored 89.9
 - Youth Co-Op scored 90.65

Approval of Youth In-School Workforce Service Providers

1. The Executive Committee approved the selection and authorization for staff to contract with two In School Youth Providers who were successful in scoring above 80% on their RFP submission
 - Adults Mankind scored 97
 - Youth Co-Op scored 92.7

Approval of American Job Center Service Providers

1. The Executive Committee approved the selection and authorization for staff to contract with two In School Youth Providers who were successful in scoring above 80% on their RFP submission
 - Youth Co-Op scored 94
 - Arbor dba Equus scored 83.45

Approval of the 2025-2026 Budget

1. The Executive Committee approved the 2025-2026 budget.
 - The SFWIB Executive Committee and Financial & Efficiency Council have reviewed the proposed SFWIB budget and allocations for PY 2024-2025. The proposed overall budget for PY 2025-2026 is set at \$37.6 million, which represents a decrease of \$5.6 million from the approved PY 2024-2025 budget. The SFWIB staff recommends a program budget of \$37.3 million and a funding reserve of \$306,994 for PY 2026-2027.

Approval of the PY'2025-2026 ITA Waiver

1. The Executive Committee to approve the submission of an Individual Training Account Expenditure Waiver in accordance with CareerSource Florida Administrative Policy 074
 - In alignment with this policy, CareerSource South Florida (CSSF) staff prepared a waiver request to reduce the required ITA expenditure rate to 40% for Program Year 2025–2026. This request was approved and submitted in conjunction with the board-approved budget for the upcoming fiscal year.

FUNDING: N/A

PERFORMANCE: N/A

NO ATTACHMENT



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

DATE: 6/26/2025

AGENDA ITEM NUMBER: 8

AGENDA ITEM SUBJECT: FINANCE AND EFFICIENCY COUNCIL UPDATE

AGENDA ITEM TYPE: **INFORMATIONAL**

RECOMMENDATION: N/A

STRATEGIC GOAL: **HIGH ROI THROUGH CONTINUOUS IMPROVEMENT**

STRATEGIC PROJECT: **Strengthen workforce system accountability**

BACKGROUND:

N/A

FUNDING: N/A

PERFORMANCE: N/A

ATTACHMENT



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

DATE: 6/26/2025

AGENDA ITEM NUMBER: 8A

AGENDA ITEM SUBJECT: FINANCIAL REPORT

AGENDA ITEM TYPE: **INFORMATIONAL**

RECOMMENDATION: N/A

STRATEGIC GOAL: **HIGH ROI THROUGH CONTINUOUS IMPROVEMENT**

STRATEGIC PROJECT: **Strengthen workforce system accountability**

BACKGROUND:

For the first ten months of the fiscal year, CareerSource South Florida has recorded an actual expenditure rate of 60.3%, which is consistent with trends observed during the same period in the prior year. However, this is below the projected expenditure rate of 83%, resulting in a variance primarily attributed to timing differences in program implementation and invoicing cycles.

Budget Variance Highlights:

- **Headquarters:** The actual expenditure rate stands at 77.5%, which is 5.5 percentage points below the projected rate. This variance is modest and within a typical operational range.
- **Adult Services:** Actual spending is 61.7%, falling 21.3 percentage points below the projected rate. This shortfall is largely driven by delays in participant enrollments and associated training expenditures.
- **Youth Services:** The expenditure rate is currently 65.3%, which is 17.7 percentage points under the projection. The variance is reflective of delayed invoicing and slower-than-anticipated program execution in the early quarters.
- **Other Programs and Projects:** Actual expenditures total 76.4%, or 6.6 percentage points below projections. This variance is attributed to timing lags in specialized grant activities and deliverables.

- Facilities: Spending on facility-related costs is at 68.4%, which is 14.6 percentage points under the expected level. The variance reflects ongoing cost containment strategies and deferred maintenance activities.

Staff will continue to monitor expenditures closely to ensure alignment with year-end financial targets and programmatic obligations.

FUNDING: N/A

PERFORMANCE: N/A

ATTACHMENT

FINANCIAL REPORT

FOR THE PERIOD OF:

JULY 1, 2024 THRU APRIL 30, 2025
(UNAUDITED)

Accompanying Notes to the Financial Report (Unaudited)
Reporting Period: July 1, 2024 – April 30, 2025

For the first ten months of the fiscal year, CareerSource South Florida has recorded an actual expenditure rate of 60.3%, which is consistent with trends observed during the same period in the prior year. However, this is below the projected expenditure rate of 83%, resulting in a variance primarily attributed to timing differences in program implementation and invoicing cycles.

Budget Variance Highlights:

- **Headquarters:** The actual expenditure rate stands at 77.5%, which is 5.5 percentage points below the projected rate. This variance is modest and within a typical operational range.
- **Adult Services:** Actual spending is 61.7%, falling 21.3 percentage points below the projected rate. This shortfall is largely driven by delays in participant enrollments and associated training expenditures.
- **Youth Services:** The expenditure rate is currently 65.3%, which is 17.7 percentage points under the projection. The variance is reflective of delayed invoicing and slower-than-anticipated program execution in the early quarters.
- **Other Programs and Projects:** Actual expenditures total 76.4%, or 6.6 percentage points below projections. This variance is attributed to timing lags in specialized grant activities and deliverables.
- **Facilities:** Spending on facility-related costs is at 68.4%, which is 14.6 percentage points under the expected level. The variance reflects ongoing cost containment strategies and deferred maintenance activities.

Staff will continue to monitor expenditures closely to ensure alignment with year-end financial targets and programmatic obligations.

SOUTH FLORIDA WORKFORCE INVESTMENT BOARD
REVENUE AND EXPENDITURES COMPARED TO BUDGET
AGENCY SUMMARY
FISCAL YEAR 2024/2025
YTD Operations (07/01/24-04/30/25)

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/24 THRU 04/30/25)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
							Std Rate= 83%
Revenues:							
WIOA	\$ 13,224,099	\$ -	\$ 1,416,201	\$ 14,640,300	\$ 1,956,023	\$ 12,684,277	13.4%
TANF	\$ 12,869,712	\$ -	\$ 200,000	\$ 13,069,712	\$ 10,926,804	\$ 2,142,908	83.6%
FLCommerce	\$ 1,901,716	\$ -	\$ 764,875	\$ 2,666,591	\$ 1,527,101	\$ 1,139,489	57.3%
Second Year Allocation from FY 23-24	\$ 15,010,803	\$ -	\$ 16,118	\$ 15,026,921	\$ 12,914,690	\$ 2,112,231	85.9%
Other	\$ -	\$ -	\$ 150,000	\$ 150,000	\$ 143,620	\$ 6,380	95.7%
Total Revenue	\$ 43,006,329	\$ -	\$ 2,547,194	\$ 45,553,523	\$ 27,468,238	\$ 18,085,284	60.3%
Expenditures:							
Headquarter Costs	\$ 8,449,524	\$ -	\$ 1,153,795	\$ 9,603,319	\$ 7,438,159	\$ 2,165,161	77.5%
Adult Services	\$ 12,665,959	\$ (120,000)	\$ (17,133)	\$ 12,528,826	\$ 7,735,139	\$ 4,793,687	61.7%
Youth Services	\$ 6,344,148	\$ (2,448,550)	\$ -	\$ 3,895,598	\$ 2,542,576	\$ 1,353,022	65.3%
Set Aside	\$ 500,000	\$ -	\$ -	\$ 500,000	\$ -	\$ 500,000	0.0%
Facilities Costs	\$ 5,027,808	\$ -	\$ 141,858	\$ 5,169,665	\$ 3,536,298	\$ 1,633,367	68.4%
Training & Support Services	\$ 10,018,890	\$ 4,679,931	\$ (2,127,326)	\$ 12,571,495	\$ 5,234,885	\$ 7,336,610	
Allocated Funds	\$ 6,018,890	\$ 2,686,740	\$ 356,509	\$ 9,062,139	\$ 5,234,885	\$ 3,827,254	52.3%
Set Asides	\$ 4,000,000	\$ 1,993,190	\$ (2,483,835)	\$ 3,509,356	\$ -	\$ 3,509,356	
Other Programs & Projects	\$ -	\$ (2,111,381)	\$ 3,396,000	\$ 1,284,619	\$ 981,182	\$ 303,437	76.4%
Big Brothers Big Sisters	\$ -	\$ -	\$ 300,000	\$ 300,000	\$ 245,572	\$ 54,428	81.9%
Summer Youth Employment (City of Opa-Locka)	\$ -	\$ (79,491)	\$ 100,000	\$ 20,509	\$ 3,487	\$ 17,022	17.0%
Apprenticeship Navigators	\$ -	\$ -	\$ 96,000	\$ 96,000	\$ -	\$ 96,000	0.0%
Summer Youth Employment (City of Miami Gardens)	\$ -	\$ (156,890)	\$ 200,000	\$ 43,110	\$ 39,893	\$ 3,217	92.5%
MidCPS Summer Youth Internship - 2023	\$ -	\$ (1,875,000)	\$ 2,500,000	\$ 625,000	\$ 495,896	\$ 129,104	79.3%
5000 Role Model Scholarships	\$ -	\$ -	\$ 200,000	\$ 200,000	\$ 196,334	\$ 3,666	98.2%
Total Expenditures	\$ 43,006,329	\$ -	\$ 2,547,194	\$ 45,553,523	\$ 27,468,238	\$ 18,085,284	60.3%
Balance of Funds Available	\$ -	\$ -	\$ -	\$ -	\$ (0)	\$ 0	

*see accompanying notes

SOUTH FLORIDA WORKFORCE INVESTMENT BOARD REVENUE AND EXPENDITURES COMPARED TO BUDGET											
WIOA ADULT FISCAL YEAR 2024/2025 YTD Operations (07/01/24-04/30/25)											
					ACTUAL (07/01/24 THRU 04/30/25)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE				
								Std Rate=	83%		
Revenues:											
WIOA					\$ 4,801,271		\$ 310,769	\$ 5,112,040	\$ 1,706,321	\$ 3,405,719	33.4%
TANF								\$ -	\$ -		
FLCommerce								\$ -	\$ -		
Second Year Allocation from FY 23-24					\$ 3,603,342			\$ 3,603,342	\$ -	100.0%	
Other								\$ -			
Total Revenue					\$ 8,404,613	\$ -	\$ 310,769	\$ 8,715,382	\$ 5,309,663	\$ 3,405,719	60.9%
Expenditures:											
Headquarter Costs					\$ 1,617,888		\$ 55,684	\$ 1,673,573	\$ 1,505,805	\$ 167,767	90.0%
Adult Services					\$ 2,389,904	\$ (120,000)	\$ 231,509	\$ 2,501,413	\$ 1,437,251	\$ 1,064,162	57.5%
Youth Services					\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Set Aside								\$ -	\$ -		
Facilities Costs					\$ 684,976		\$ 23,576	\$ 708,551	\$ 558,532	\$ 150,020	78.8%
Training & Support Services					\$ 3,711,845	\$ 120,000	\$ -	\$ 3,831,845	\$ 1,808,075	\$ 2,023,770	47.2%
Allocated Funds					\$ 2,928,756	\$ 120,000		\$ 3,048,756	\$ 1,808,075	\$ 1,240,681	59.3%
Set Asides					\$ 783,089			\$ 783,089	\$ 783,089		0.0%
Other Programs & Projects					\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Big Brothers Big Sisters								\$ -	\$ -		
Summer Youth Employment (City of Opa-Locka)								\$ -	\$ -		
Apprenticeship Navigators								\$ -	\$ -		
Summer Youth Employment (City of Miami Gardens)								\$ -	\$ -		
MiDCPS Summer Youth Internship - 2023								\$ -	\$ -		
5000 Role Model Scholarships								\$ -	\$ -		
Total Expenditures					\$ 8,404,613	\$ -	\$ 310,769	\$ 8,715,382	\$ 5,309,663	\$ 3,405,719	60.9%
Balance of Funds Available					\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	

*see accompanying notes

SOUTH FLORIDA WORKFORCE INVESTMENT BOARD REVENUE AND EXPENDITURES COMPARED TO BUDGET <u>WIOA DISLOCATED WORKER</u> FISCAL YEAR 2024/2025 YTD Operations (07/01/24-04/30/25)					
	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	
Revenues:					
WIOA	\$ 3,304,234		\$ 310,769	\$ 3,615,003	
TANF				\$ -	
FLCommerce				\$ -	
Second Year Allocation from FY 23-24	\$ 3,941,994			\$ 3,941,994	
Other				\$ -	
Total Revenue	\$ 7,246,228	\$ -	\$ 310,769	\$ 7,556,997	
Expenditures:					
Headquarter Costs	\$ 1,394,899		\$ 287,193	\$ 1,682,092	
Adult Services	\$ 2,062,270	\$ -	\$ -	\$ 2,062,270	
Youth Services	\$ -	\$ -	\$ -	\$ -	
Set Aside				\$ -	
Facilities Costs	\$ 590,568		\$ 23,576	\$ 614,143	
Training & Support Services	\$ 3,198,491	\$ -	\$ -	\$ 3,198,491	
Allocated Funds	\$ 2,523,333			\$ 2,523,333	
Set Asides	\$ 675,158			\$ 675,158	
Other Programs & Projects	\$ -	\$ -	\$ -	\$ -	
Big Brothers Big Sisters				\$ -	
Summer Youth Employment (City of Opa-Locka)				\$ -	
Apprenticeship Navigators				\$ -	
Summer Youth Employment (City of Miami Gardens)				\$ -	
MIDCPS Summer Youth Internship - 2023				\$ -	
5000 Role Model Scholarships				\$ -	
Total Expenditures	\$ 7,246,228	\$ -	\$ 310,769	\$ 7,556,997	
Balance of Funds Available	\$ -	\$ -	\$ -	\$ -	

ACTUAL (07/01/24 THRU 04/30/25)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
		Std Rate= 83%
	\$ 3,615,003	0.0%
	\$ -	
	\$ -	
\$ 3,075,905	\$ 866,089	78.0%
\$ 3,075,905	\$ 4,481,092	40.7%

ACTUAL (07/01/24 THRU 04/30/25)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
\$ 869,957	\$ 812,135	51.7%
\$ 1,237,083	\$ 825,188	60.0%
\$ -	\$ -	
	\$ -	
\$ 518,179	\$ 95,964	84.4%
\$ 450,686	\$ 2,747,805	14.1%
\$ 450,686	\$ 2,072,647	17.9%
	\$ 675,158	0.0%
\$ -	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
\$ 3,075,905	\$ 4,481,092	40.7%

*see accompanying notes

SOUTH FLORIDA WORKFORCE INVESTMENT BOARD
REVENUE AND EXPENDITURES COMPARED TO BUDGET
WIOA RAPID RESPONSE
FISCAL YEAR 2024/2025
YTD Operations (07/01/24-04/30/25)

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/24 THRU 04/30/25)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
					Std Rate= 83%		
Revenues:							
WIOA	\$ 778,754			\$ 778,754		\$ 778,754	0.0%
TANF				\$ -		\$ -	
FLCommerce				\$ -		\$ -	
Second Year Allocation from FY 23-24	\$ 742,630			\$ 742,630	\$ 430,583	\$ 312,047	58.0%
Other				\$ -			
Total Revenue	\$ 1,521,384	\$ -	\$ -	\$ 1,521,384	\$ 430,583	\$ 1,090,801	28.3%
Expenditures:							
Headquarter Costs	\$ 292,866			\$ 292,866	\$ 129,682	\$ 163,184	44.3%
Adult Services	\$ 395,971	\$ -	\$ -	\$ 395,971	\$ 233,669	\$ 162,302	59.0%
Youth Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Set Aside				\$ -		\$ -	
Facilities Costs	\$ 123,993			\$ 123,993	\$ 67,232	\$ 56,761	54.2%
Training & Support Services	\$ 708,554	\$ -	\$ -	\$ 708,554	\$ -	\$ 708,554	0.0%
Allocated Funds	\$ 566,801			\$ 566,801		\$ 566,801	0.0%
Set Asides	\$ 141,753			\$ 141,753		\$ 141,753	0.0%
Other Programs & Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Big Brothers Big Sisters				\$ -		\$ -	
Summer Youth Employment (City of Opa-Locka)				\$ -		\$ -	
Apprenticeship Navigators				\$ -		\$ -	
Summer Youth Employment (City of Miami Gardens)				\$ -		\$ -	
MIDCPS Summer Youth Internship - 2023				\$ -		\$ -	
5000 Role Model Scholarships				\$ -		\$ -	
Total Expenditures	\$ 1,521,384	\$ -	\$ -	\$ 1,521,384	\$ 430,583	\$ 1,090,801	28.3%
Balance of Funds Available	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	

*see accompanying notes

YTD Operations (07/01/24-04/30/25)

*see accompanying notes

SOUTH FLORIDA WORKFORCE INVESTMENT BOARD
REVENUE AND EXPENDITURES COMPARED TO BUDGET
TANF
FISCAL YEAR 2024/2025
YTD Operations (07/01/24-04/30/25)

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/24 THRU 04/30/25)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
							Std Rate= 83%
Revenues:							
WIOA				\$ -			
TANF	\$ 12,869,712		\$ 200,000	\$ 13,069,712	\$ 10,926,804	\$ 2,142,908	83.6%
FLCommerce				\$ -		\$ -	
Second Year Allocation from FY 23-24	\$ 584,704			\$ 584,704	\$ 584,704	\$ -	100.0%
Other				\$ -		\$ -	
Total Revenue	\$ 13,454,416	\$ -	\$ 200,000	\$ 13,654,416	\$ 11,511,508	\$ 2,142,908	84.3%
Expenditures:							
Headquarter Costs	\$ 2,589,975			\$ 2,589,975	\$ 2,766,242	\$ (176,267)	106.8%
Adult Services	\$ 7,367,906	\$ -	\$ (466,165)	\$ 6,901,741	\$ 4,546,949	\$ 2,354,792	65.9%
Youth Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Set Aside				\$ -		\$ -	
Facilities Costs	\$ 1,096,535			\$ 1,096,535	\$ 1,329,470	\$ (232,935)	121.2%
Training & Support Services	\$ 2,400,000	\$ 1,993,190	\$ (2,483,835)	\$ 1,909,356	\$ 1,909,356	\$ (0)	100.0%
Allocated Funds	\$ -			\$ -	\$ 1,909,356	\$ (1,909,356)	
Set Asides	\$ 2,400,000	\$ 1,993,190	\$ (2,483,835)	\$ 1,909,356		\$ 1,909,356	0.0%
Other Programs & Projects	\$ -	\$ (1,993,190)	\$ 3,150,000	\$ 1,156,810	\$ 959,492	\$ 197,317	82.9%
Big Brothers Big Sisters		\$ 300,000	\$ 300,000	\$ 300,000	\$ 245,572	\$ 54,428	81.9%
Summer Youth Employment (City of Opa-Locka)		\$ (39,745)	\$ 50,000	\$ 10,255	\$ 1,743	\$ 8,511	17.0%
Apprenticeship Navigators				\$ -		\$ -	
Summer Youth Employment (City of Miami Gardens)		\$ (78,445)	\$ 100,000	\$ 21,555	\$ 19,946	\$ 1,609	92.5%
MidCPS Summer Youth Internship - 2023		\$ (1,875,000)	\$ 2,500,000	\$ 625,000	\$ 495,896	\$ 129,104	79.3%
5000 Role Model Scholarships			\$ 200,000	\$ 200,000	\$ 196,334	\$ 3,666	98.2%
Total Expenditures	\$ 13,454,416	\$ -	\$ 200,000	\$ 13,654,416	\$ 11,511,508	\$ 2,142,908	84.3%
Balance of Funds Available	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	

*see accompanying notes

SOUTH FLORIDA WORKFORCE INVESTMENT BOARD REVENUE AND EXPENDITURES COMPARED TO BUDGET <u>Layoff Aversion / Apprenticeship Navigator</u> FISCAL YEAR 2024/2025 YTD Operations (07/01/24-04/30/25)							
	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/24 THRU 04/30/25)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
					Std Rate= 83%		
Revenues:							
WIOA	\$ -		\$ 358,894	\$ 358,894	\$ 249,702	\$ 109,192	69.6%
TANF				\$ -			
FLCommerce			\$ 96,000	\$ 96,000	\$ 13,597	\$ 82,403	14.2%
Second Year Allocation from FY 23-24				\$ -			
Other				\$ -			
Total Revenue	\$ -	\$ -	\$ 454,894	\$ 454,894	\$ 263,299	\$ 191,595	57.9%
Expenditures:							
Headquarter Costs	\$ -		\$ 358,894	\$ 358,894	\$ 251,145	\$ 107,749	70.0%
Adult Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Youth Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Set Aside				\$ -		\$ -	
Facilities Costs				\$ -	\$ 12,154	\$ (12,154)	
Training & Support Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Allocated Funds				\$ -		\$ -	
Set Asides				\$ -		\$ -	
Other Programs & Projects	\$ -	\$ -	\$ 96,000	\$ 96,000		\$ 96,000	0.0%
Big Brothers Big Sisters				\$ -		\$ -	
Summer Youth Employment (City of Opa-Locka)				\$ -		\$ -	
Apprenticeship Navigators			\$ 96,000	\$ 96,000		\$ 96,000	0.0%
Summer Youth Employment (City of Miami Gardens)				\$ -		\$ -	
MIDCPS Summer Youth Internship - 2023				\$ -		\$ -	
5000 Role Model Scholarships				\$ -		\$ -	
Total Expenditures	\$ -	\$ -	\$ 454,894	\$ 454,894	\$ 263,299	\$ 191,595	57.9%
Balance of Funds Available	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	

*see accompanying notes

<p align="center"> SOUTH FLORIDA WORKFORCE INVESTMENT BOARD REVENUE AND EXPENDITURES COMPARED TO BUDGET <u>SUMMER YOUTH EMPLOYMENT PROGRAM</u> FISCAL YEAR 2024/2025 YTD Operations (07/01/24-04/30/25) (City of Miami Gardens / City of Opa-Locka) </p>	
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		BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/24 THRU 04/30/25)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
Revenues:								Std Rate= 83%
WIOA					\$ -			
TANF					\$ -			
FLCommerce					\$ -		\$ -	
Second Year Allocation from FY 23-24					\$ -			
Other				\$ 150,000	\$ 150,000	\$ 143,620	\$ 6,380	95.7%
Total Revenue		\$ -	\$ -	\$ 150,000	\$ 150,000	\$ 143,620	\$ 6,380	95.7%
Expenditures:								
Headquarter Costs					\$ -	\$ 16,167	\$ (16,167)	
Adult Services		\$ -	\$ -		\$ -	\$ -	\$ -	
Youth Services		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Set Aside					\$ -		\$ -	
Facilities Costs					\$ -		\$ -	
Training & Support Services		\$ -	\$ 118,190	\$ -	\$ 118,190	\$ 105,763	\$ 12,428	89.5%
Allocated Funds			\$ 118,190		\$ 118,190	\$ 105,763	\$ 12,428	89.5%
Set Asides					\$ -		\$ -	
Other Programs & Projects		\$ -	\$ (118,190)	\$ 150,000	\$ 31,810	\$ 21,690	\$ 10,120	68.2%
Big Brothers Big Sisters					\$ -	\$ -	\$ -	
Summer Youth Employment (City of Opa-Locka)			\$ (39,745)	\$ 50,000	\$ 10,255	\$ 1,743	\$ 8,511	17.0%
Apprenticeship Navigators					\$ -	\$ -	\$ -	
Summer Youth Employment (City of Miami Gardens)			\$ (78,445)	\$ 100,000	\$ 21,555	\$ 19,946	\$ 1,609	92.5%
MiDCPS Summer Youth Internship - 2023					\$ -		\$ -	
5000 Role Model Scholarships					\$ -		\$ -	
Total Expenditures		\$ -	\$ -	\$ 150,000	\$ 150,000	\$ 143,620	\$ 6,380	95.7%
Balance of Funds Available		\$ -	\$ -	\$ -	\$ -	\$ (0)	\$ 0	

*see accompanying notes

SOUTH FLORIDA WORKFORCE INVESTMENT BOARD REVENUE AND EXPENDITURES COMPARED TO BUDGET									
WIOA/WP - Hope Florida FISCAL YEAR 2024/2025 YTD Operations (07/01/24-04/30/25)									
		BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/24 THRU 04/30/25)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE	
					Std Rate= 83%				
Revenues:									
WIOA					\$ -				
TANF					\$ -				
FLCommerce		\$ 213,329		\$ 75,914	\$ 289,243	\$ 575,049	\$ (285,806)	198.8%	
Second Year Allocation from FY 23-24					\$ -		\$ -		
Other					\$ -		\$ -		
Total Revenue		\$ 213,329	\$ -	\$ 75,914	\$ 289,243	\$ 575,049	\$ (285,806)	198.8%	
Expenditures:									
Headquarter Costs		\$ 213,329		\$ 75,914	\$ 289,243	\$ 219,694	\$ 69,550	76.0%	
Adult Services		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Youth Services		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Set Aside					\$ -		\$ -		
Facilities Costs					\$ -	\$ 355,356	\$ (355,356)		
Training & Support Services		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Allocated Funds					\$ -		\$ -		
Set Asides					\$ -		\$ -		
Other Programs & Projects		\$ -	\$ -	\$ -	\$ -		\$ -		
Big Brothers Big Sisters					\$ -		\$ -		
Summer Youth Employment (City of Opa-Locka)					\$ -		\$ -		
Apprenticeship Navigators					\$ -		\$ -		
Summer Youth Employment (City of Miami Gardens)					\$ -		\$ -		
MIDCPS Summer Youth Internship - 2023					\$ -		\$ -		
5000 Role Model Scholarships					\$ -		\$ -		
Total Expenditures		\$ 213,329	\$ -	\$ 75,914	\$ 289,243	\$ 575,049	\$ (285,806)	198.8%	
Balance of Funds Available		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
*see accompanying notes									

SOUTH FLORIDA WORKFORCE INVESTMENT BOARD REVENUE AND EXPENDITURES COMPARED TO BUDGET <u>Automated Monitoring Tool (WIS24A)</u> FISCAL YEAR 2024/2025 YTD Operations (07/01/24-04/30/25)					
	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	
Revenues:					
WIOA				\$ -	
TANF				\$ -	
FLCommerce			\$ 237,780	\$ 237,780	
Second Year Allocation from FY 23-24				\$ -	
Other				\$ -	
Total Revenue	\$ -	\$ -	\$ 237,780	\$ 237,780	
Expenditures:					
Headquarter Costs			\$ 237,780	\$ 237,780	
Adult Services	\$ -	\$ -	\$ -	\$ -	
Youth Services	\$ -	\$ -	\$ -	\$ -	
Set Aside				\$ -	
Facilities Costs				\$ -	
Training & Support Services	\$ -	\$ -	\$ -	\$ -	
Allocated Funds				\$ -	
Set Asides				\$ -	
Other Programs & Projects	\$ -	\$ -	\$ -	\$ -	
Big Brothers Big Sisters				\$ -	
Summer Youth Employment (City of Opa-Locka)				\$ -	
Apprenticeship Navigators				\$ -	
Summer Youth Employment (City of Miami Gardens)				\$ -	
MIDCPS Summer Youth Internship - 2023				\$ -	
5000 Role Model Scholarships				\$ -	
Total Expenditures	\$ -	\$ -	\$ 237,780	\$ 237,780	
Balance of Funds Available	\$ -	\$ -	\$ -	\$ -	

ACTUAL (07/01/24 THRU 04/30/25)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
		Std Rate= 83%
\$ 154,266	\$ 83,514	64.9%
	\$ -	
\$ 154,266	\$ 83,514	64.9%
\$ 154,266	\$ 83,514	64.9%
\$ -	\$ -	
\$ -	\$ -	
	\$ -	
	\$ -	
\$ -	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
\$ 154,266	\$ 83,514	64.9%
\$ -	\$ -	

*see accompanying notes

SOUTH FLORIDA WORKFORCE INVESTMENT BOARD									
REVENUE AND EXPENDITURES COMPARED TO BUDGET									
FSET									
FISCAL YEAR 2024/2025									
YTD Operations (07/01/24-04/30/25)									
		BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/24 THRU 04/30/25)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE	
					Std Rate= 83%				
Revenues:									
WIOA					\$ -				
TANF					\$ -				
FLCommerce		\$ 619,539		\$ 28,019	\$ 647,558	\$ 710,423	\$ (62,865)	109.7%	
Second Year Allocation from FY 23-24		\$ -			\$ -	\$ -	\$ -		
Other					\$ -				
Total Revenue		\$ 619,539	\$ -	\$ 28,019	\$ 647,558	\$ 710,423	\$ (62,865)	109.7%	
Expenditures:									
Headquarter Costs		\$ 119,261		\$ 19,684.80	\$ 138,946	\$ 350,861	\$ (211,915)	252.5%	
Adult Services		\$ 449,785	\$ -	\$ -	\$ 449,785	\$ 280,152	\$ 169,634	62.3%	
Youth Services		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Set Aside					\$ -		\$ -		
Facilities Costs		\$ 50,492		\$ 8,334	\$ 58,827	\$ 79,410	\$ (20,583)	135.0%	
Training & Support Services		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Allocated Funds					\$ -		\$ -		
Set Asides					\$ -		\$ -		
Other Programs & Projects		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Big Brothers Big Sisters					\$ -		\$ -		
Summer Youth Employment (City of Opa-Locka)					\$ -		\$ -		
Apprenticeship Navigators					\$ -		\$ -		
Summer Youth Employment (City of Miami Gardens)					\$ -		\$ -		
MIDCPS Summer Youth Internship - 2023					\$ -		\$ -		
5000 Role Model Scholarships					\$ -		\$ -		
Total Expenditures		\$ 619,539	\$ -	\$ 28,019	\$ 647,558	\$ 710,423	\$ (62,865)	109.7%	
Balance of Funds Available		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		

*see accompanying notes

SOUTH FLORIDA WORKFORCE INVESTMENT BOARD
REVENUE AND EXPENDITURES COMPARED TO BUDGET

RESEA
FISCAL YEAR 2024/2025
YTD Operations (07/01/24-04/30/25)

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/24 THRU 04/30/25)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
Revenues:							Std Rate= 83%
WIOA				\$ -			
TANF				\$ -			
FLCommerce			\$ 299,619	\$ 299,619	\$ 43,658	\$ 255,961	14.6%
Second Year Allocation from FY 23-24	\$ 168			\$ 168	\$ 168	\$ -	100.0%
Other				\$ -			
Total Revenue	\$ 168	\$ -	\$ 299,619	\$ 299,787	\$ 43,826	\$ 255,961	14.6%
Expenditures:							
Headquarter Costs	\$ 32		\$ 57,677	\$ 57,709	\$ 42,060	\$ 15,649	72.9%
Adult Services	\$ 122	\$ -	\$ 217,523	\$ 217,645	\$ 36	\$ 217,610	0.0%
Youth Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Set Aside				\$ -		\$ -	
Facilities Costs	\$ 14		\$ 24,419	\$ 24,433	\$ 1,730	\$ 22,703	7.1%
Training & Support Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Allocated Funds				\$ -		\$ -	
Set Asides				\$ -		\$ -	
Other Programs & Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Big Brothers Big Sisters				\$ -		\$ -	
Summer Youth Employment (City of Opa-Locka)				\$ -		\$ -	
Apprenticeship Navigators				\$ -		\$ -	
Summer Youth Employment (City of Miami Gardens)				\$ -		\$ -	
MIDCPS Summer Youth Internship - 2023				\$ -		\$ -	
5000 Role Model Scholarships				\$ -		\$ -	
Total Expenditures	\$ 168	\$ -	\$ 299,619	\$ 299,787	\$ 43,826	\$ 255,961	14.6%
Balance of Funds Available	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	

*see accompanying notes

**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD
REVENUE AND EXPENDITURES COMPARED TO BUDGET**

LOCAL VETERANS

FISCAL YEAR 2024/2025

YTD Operations (07/01/24-04/30/25)

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/24 THRU 04/30/25)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
Revenues:							Std Rate= 83%
WIOA				\$ -		\$ -	
TANF				\$ -		\$ -	
FLCommerce			\$ 27,543	\$ 27,543	\$ 30,109	\$ (2,566)	109.3%
Second Year Allocation from FY 23-24	\$ 3,739		\$ 11,762	\$ 15,501	\$ 15,501	\$ -	100.0%
Other				\$ -	\$ -	\$ -	
Total Revenue	\$ 3,739	\$ -	\$ 39,305	\$ 43,044	\$ 45,610	\$ (2,566)	106.0%
Expenditures:							
Headquarter Costs	\$ 452		\$ 4,756	\$ 5,208	\$ 9,136	\$ (3,927)	175.4%
Adult Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Youth Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Set Aside				\$ -		\$ -	
Facilities Costs	\$ 3,287		\$ 34,549	\$ 37,836	\$ 36,474	\$ 1,362	96.4%
Training & Support Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Allocated Funds				\$ -		\$ -	
Set Asides				\$ -		\$ -	
Other Programs & Projects	\$ -	\$ -	\$ -	\$ -		\$ -	
Big Brothers Big Sisters				\$ -		\$ -	
Summer Youth Employment (City of Opa-Locka)				\$ -		\$ -	
Apprenticeship Navigators				\$ -		\$ -	
Summer Youth Employment (City of Miami Gardens)				\$ -		\$ -	
MDCPS Summer Youth Internship - 2023				\$ -		\$ -	
5000 Role Model Scholarships				\$ -		\$ -	
Total Expenditures	\$ 3,739	\$ -	\$ 39,305	\$ 43,044	\$ 45,610	\$ (2,566)	106.0%
Balance of Funds Available	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	

*see accompanying notes

**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD
REVENUE AND EXPENDITURES COMPARED TO BUDGET**

DISABLED VETERANS
FISCAL YEAR 2024/2025
YTD Operations (07/01/24-04/30/25)

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/24 THRU 04/30/25)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
Revenues:							Std Rate= 83%
WIOA				\$ -			
TANF				\$ -			
FLCommerce				\$ -			
Second Year Allocation from FY 23-24	\$ 16,638		\$ 4,356	\$ 20,994	\$ -	\$ -	
Other				\$ -	\$ 5,637	\$ 15,358	26.8%
Total Revenue	\$ 16,638	\$ -	\$ 4,356	\$ 20,994	\$ 5,637	\$ 15,358	26.8%
Expenditures:							
Headquarter Costs	\$ 2,013		\$ 527	\$ 2,540	\$ 981	\$ 1,559	38.6%
Adult Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Youth Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Set Aside				\$ -		\$ -	
Facilities Costs	\$ 14,625		\$ 3,829	\$ 18,454	\$ 4,655	\$ 13,799	25.2%
Training & Support Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Allocated Funds				\$ -		\$ -	
Set Asides				\$ -		\$ -	
Other Programs & Projects	\$ -	\$ -	\$ -	\$ -		\$ -	
Big Brothers Big Sisters				\$ -		\$ -	
Summer Youth Employment (City of Opa-Locka)				\$ -		\$ -	
Apprenticeship Navigators				\$ -		\$ -	
Summer Youth Employment (City of Miami Gardens)				\$ -		\$ -	
MIDCPS Summer Youth Internship - 2023				\$ -		\$ -	
5000 Role Model Scholarships				\$ -		\$ -	
Total Expenditures	\$ 16,638	\$ -	\$ 4,356	\$ 20,994	\$ 5,637	\$ 15,358	26.8%
Balance of Funds Available	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	

*see accompanying notes

**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD
REVENUE AND EXPENDITURES COMPARED TO BUDGET**

WAGNER PEYSER
FISCAL YEAR 2024/2025
YTD Operations (07/01/24-04/30/25)

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/24 THRU 04/30/25)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
Revenues:							Std Rate= 83%
WIOA				\$ -			
TANF				\$ -			
FLCommerce	\$ 1,068,848			\$ 1,068,848	\$ 492,132	\$ 1,068,848	0.0%
Second Year Allocation from FY 23-24	\$ 1,030,225			\$ 1,030,225		\$ 538,093	47.8%
Other				\$ -		\$ -	
Total Revenue	\$ 2,099,073	\$ -	\$ -	\$ 2,099,073	\$ 492,132	\$ 1,606,940	23.4%
Expenditures:							
Headquarter Costs	\$ 404,071			\$ 404,071	\$ 120,644	\$ 283,428	29.9%
Adult Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Youth Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Set Aside				\$ -		\$ -	
Facilities Costs	\$ 1,695,001			\$ 1,695,001	\$ 371,488	\$ 1,323,513	21.9%
Training & Support Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Allocated Funds				\$ -		\$ -	
Set Asides				\$ -		\$ -	
Other Programs & Projects	\$ -	\$ -	\$ -	\$ -		\$ -	
Big Brothers Big Sisters				\$ -		\$ -	
Summer Youth Employment (City of Opa-Locka)				\$ -		\$ -	
Apprenticeship Navigators				\$ -		\$ -	
Summer Youth Employment (City of Miami Gardens)				\$ -		\$ -	
MIDCPS Summer Youth Internship - 2023				\$ -		\$ -	
5000 Role Model Scholarships				\$ -		\$ -	
Total Expenditures	\$ 2,099,073	\$ -	\$ -	\$ 2,099,073	\$ 492,132	\$ 1,606,940	23.4%
Balance of Funds Available	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	

*see accompanying notes

YTD Operations (07/01/24-04/30/25)

*see accompanying notes



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

DATE: 6/26/2025

AGENDA ITEM NUMBER: 9

AGENDA ITEM SUBJECT: GLOBAL TALENT AND COMPETITIVENESS COUNCIL UPDATE

AGENDA ITEM TYPE: **INFORMATIONAL**

RECOMMENDATION: N/A

STRATEGIC GOAL: **BUILD DEMAND-DRIVEN SYSTEM W/ EMPLOYER ENGAGEMENT**

STRATEGIC PROJECT: **National leader in an ROI-focused enterprise**

BACKGROUND:

N/A

FUNDING: N/A

PERFORMANCE: N/A

NO ATTACHMENT



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

DATE: 6/26/2025

AGENDA ITEM NUMBER: 10

AGENDA ITEM SUBJECT: PERFORMANCE COUNCIL UPDATE

AGENDA ITEM TYPE: **INFORMATIONAL**

RECOMMENDATION: N/A

STRATEGIC GOAL: **STRONG WORKFORCE SYSTEM LEADERSHIP**

STRATEGIC PROJECT: **Strengthen workforce system accountability**

BACKGROUND:

N/A

FUNDING: N/A

PERFORMANCE: N/A

NO ATTACHMENT



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

DATE: 6/26/2025

AGENDA ITEM NUMBER: 11

AGENDA ITEM SUBJECT: ACTION ITEMS

AGENDA ITEM TYPE: **APPROVAL**

RECOMMENDATION: N/A

STRATEGIC GOAL: **HIGH ROI THROUGH CONTINUOUS IMPROVEMENT**

STRATEGIC PROJECT: **National leader in an ROI-focused enterprise**

BACKGROUND:

N/A

FUNDING: N/A

PERFORMANCE: N/A

ATTACHMENT



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

DATE: 6/26/2025

AGENDA ITEM NUMBER: 11A

AGENDA ITEM SUBJECT: RELATED PARTY TRAINING VENDOR AGREEMENTS

AGENDA ITEM TYPE: **APPROVAL**

RECOMMENDATION: The Executive Committee recommends to the Board the approval of Training Vendor Agreements with the Training Vendors that are represented on the Board, as set forth below.

STRATEGIC GOAL: **HIGH ROI THROUGH CONTINUOUS IMPROVEMENT**

STRATEGIC PROJECT: **Improve credential outcomes for job seekers**

BACKGROUND:

CareerSource Florida Contracting Policy prohibits the use of state or federal funds by a regional workforce board for any contract exceeding \$25,000 between a regional workforce board and a member of that board that has any relationship with the contracting vendor, unless the Department of Economic Opportunity (DEO) and CareerSource Florida has reviewed the contract.

SFWIB staff recommends to the Executive Committee to recommend to the Board the approval of Training Vendor Agreements with the following Training Vendors that are represented on the Board:

- The District Board of Trustees of Miami Dade College (MDC)
- Miami-Dade County Public Schools (M-DCPS)
- Atlantis University

The policy does not exclude agreements with training/educational institutions that regional workforce boards enter into with a training/educational institution included on the local eligible training provider list and for which eligible applicants choose from when selecting a training/educational provider. Accordingly, the Training Vendor Agreements between the SFWIB and MDC, M-DCPS, and Atlantis University are subject to the two-thirds vote requirement and will be submitted to Florida Commerce and CareerSource Florida for review.

FUNDING: N/A

PERFORMANCE: N/A

NO ATTACHMENT



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

DATE: 06/26/2025

AGENDA ITEM NUMBER: 11B

AGENDA ITEM SUBJECT: NEW REGISTERED APPRENTICESHIP PROGRAM

AGENDA ITEM TYPE: **APPROVAL**

RECOMMENDATION: The Global Talent and Competitive Council recommends to the Board the approval of a new Registered Apprenticeship Program, as set forth below.

STRATEGIC GOAL: **HIGH ROI THROUGH CONTINUOUS IMPROVEMENT**

STRATEGIC PROJECT: **Improve credential outcomes for job seekers**

BACKGROUND:

Pursuant to Section 122 of the Workforce Innovation and Opportunity Act (WIOA), local workforce development boards are authorized to establish their own criteria for selecting eligible training providers and programs. In alignment with this provision, the South Florida Workforce Investment Board (SFWIB) has developed a rigorous evaluation process to assess the qualifications and programmatic capabilities of training providers seeking approval.

Following a thorough review, SFWIB staff recommends the approval of the following new Registered Apprenticeship Program:

1. American Institute of CPAs (AICPA) Apprenticeship Program – INJ (2024-FL-130910)
 - Finance Business Partner (RAPIDS Code: 3003CB)

The AICPA Finance Business Partner apprenticeship program is designed to prepare participants for strategic roles in financial management within diverse organizational settings. The curriculum equips apprentices with competencies in cost analysis, budgeting, and financial reporting, with a strong emphasis on planning, performance measurement, and control. Participants will apply knowledge of financial reporting standards, corporate governance, ethics, and tax implications to support business decisions.

In addition to technical finance skills, the program cultivates a broad understanding of organizational operations and value creation strategies. Apprentices will engage in critical thinking, problem-solving, and collaborative exercises to support executive decision-making, conduct performance evaluations, and improve operational efficiency. The program also emphasizes effective relationship management with internal and external stakeholders to align financial practices with strategic organizational goals.

Approval of this program will enhance the region's efforts to expand high-quality apprenticeship opportunities and strengthen our workforce pipeline in the financial services sector.

FUNDING: N/A

PERFORMANCE: N/A

NO ATTACHMENT



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

DATE: 6/26/2025

AGENDA ITEM NUMBER: 11C

AGENDA ITEM SUBJECT: NEW TRAINING PROVIDER WITH PROGRAM AND NEW PROGRAMS FOR AN EXISTING PROVIDER.

AGENDA ITEM TYPE: **APPROVAL**

RECOMMENDATION: The Global Talent and Competitiveness Council recommends to the Board the approval of a new training provider to include their program and two new programs for an existing provider, as set forth below.

STRATEGIC GOAL: **HIGH ROI THROUGH CONTINUOUS IMPROVEMENT**

STRATEGIC PROJECT: **Improve credential outcomes for job seekers**

BACKGROUND:

Pursuant to Section 122 of the Workforce Innovation and Opportunity Act (WIOA), local workforce development boards have the authority to establish eligibility criteria and approve training providers and programs within their jurisdiction. In accordance with this provision, the South Florida Workforce Investment Board (SFWIB) has implemented a comprehensive process to evaluate the qualifications, performance, and programmatic capabilities of training providers.

Following the completion of this review process, SFWIB staff recommends that the Global Talent and Competitiveness Council approve the following new training provider and program additions:

Request for Addition as a New Training Provider and Program

1. Coding Clarified LLC
 - Professional Medical Coding Curriculum

This program is designed to prepare individuals for careers in the high-demand field of medical coding, equipping participants with the skills necessary to accurately assign codes to medical diagnoses and procedures in compliance with health information standards.

Request from Existing Training Provider to Add New Programs

2. District Board of Trustees of Miami Dade College (dba Miami Dade College)
 - Commercial Vehicle Driving
 - Commercial Class B Driving

These programs provide comprehensive training for individuals seeking careers in commercial truck and bus driving. They address both practical and theoretical components of commercial driving to meet industry licensure and safety requirements.

The approval of these programs will expand access to industry-recognized training opportunities and support the region's workforce development goals in healthcare and transportation sectors.

FUNDING: N/A

PERFORMANCE: N/A

NO ATTACHMENT



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

DATE: 6/26/2025

AGENDA ITEM NUMBER: 11D

AGENDA ITEM SUBJECT: PROGRAM YEAR 2025-2026 AMERICAN JOB CENTER SCHEDULE OF OPERATIONS

AGENDA ITEM TYPE: **APPROVAL**

RECOMMENDATION: The Performance Council recommends to the Board the approval of the following American Job Centers (CareerSource centers) and Affiliated Colleges CareerSource centers Schedule of Operations for program year 2025–2026, as set forth below, as set forth below.

STRATEGIC GOAL: **STRONG WORKFORCE SYSTEM LEADERSHIP**

STRATEGIC PROJECT: **Strengthen workforce system accountability**

BACKGROUND:

In accordance with the Department of Economic Opportunity (DEO) Grantee/Subgrantee Agreement, the South Florida Workforce Investment Board (SFWIB) is required to adopt an official schedule of operations for the upcoming state fiscal year. This schedule must include the daily hours of operation for all One-Stop Career Centers, as well as a holiday closure calendar that aligns with either the federal, state, or appropriate county holiday schedule. For CareerSource centers co-located with colleges or universities, the holiday schedule of the affiliated educational institution may be adopted.

SFWIB staff recommends that the Council approve the following standard schedule for all CareerSource South Florida centers operated by One-Stop Providers (including Carol City, Hialeah Downtown, Little Havana, Floral Heights, North Miami Beach, Perrine, Homestead, and West Dade):

- Daily Hours of Operation: 8:00 a.m. to 5:00 p.m., Monday through Friday
- Holiday Schedule: As outlined in the attached memorandum

This proposed schedule ensures consistency in service delivery across the region and aligns with state policy requirements.

FUNDING: N/A

PERFORMANCE: N/A

ATTACHMENT

American Job Center Calendar 2025 – 2026

DATE HOLIDAYS/RECESS PERIOD

Friday, July 4, 2025	Observance of Independence Day
Monday, September 1, 2025	Observance of Labor Day
Monday, October 13, 2025	Observance of Columbus Day
Tuesday, November 11, 2025	Observance of Veterans Day
Thursday-Friday, November 27-28, 2025	Observance of Thanksgiving Holiday
Thursday, December 25, 2025	Observance of Christmas Holiday
Thursday, January 1, 2026	Observance of New Year's Day Holiday
Monday, January 19, 2026	Observance of Martin Luther King, Jr. Birthday
Monday, February 16, 2026	Observance of Presidents' Day
Friday, May 8, 2026	National Law Enforcement Appreciation Day
Monday, May 25, 2026	Observance of Memorial Day
Friday, June 19, 2026	Juneteenth Holiday
Friday, July 3, 2026	Observance of Independence Day



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

DATE: 6/25/2025

AGENDA ITEM NUMBER: 11E

AGENDA ITEM SUBJECT: REVISIONS TO WORKFORCE SERVICES BALANCED SCORECARD

AGENDA ITEM TYPE: **APPROVAL**

RECOMMENDATION: The Performance Council recommends to the Board the approval a new Workforce Services Balanced Scorecard for Program Year 25-26

STRATEGIC GOAL: **STRENGTHEN THE ONE-STOP DELIVERY SYSTEM**

STRATEGIC PROJECT: **Enhance CSSF performance system**

BACKGROUND:

The South Florida Workforce Investment Board (SFWIB) utilizes the Balanced Scorecard (BSC) as a strategic performance management tool to assess the effectiveness of CareerSource South Florida's Career Centers (American Job Centers) across Local Workforce Development Area (LWDA) 23. In an effort to strengthen alignment with federal and state priorities—particularly the Reimagining Education and Career Help (REACH) Act—SFWIB staff is recommending key updates to the BSC. These revisions are intended to improve accountability, streamline performance evaluation, and ensure a more accurate reflection of workforce system outcomes.

Proposed Additions and Revisions to the Balanced Scorecard:

- Common Measures
- Increased Earnings
- Number of Job Openings
- Career Advancement Program (CAP)/WIOA Enrollments
- SNAP E&T/WIOA Co-Enrollments
- SNAP Entered Employment Rate (EER)
- Work-Based Training

Recommended Removals from the Balanced Scorecard:

- Training Completion Rate and Training-Related Placements
- Measurable Skills Gain
- Employers Served
- Number of Job Orders
- Referral Skills Match
- Employed 1st, 2nd, 3rd, and 4th Quarter After Exit

To reinforce accountability, SFWIB staff recommends that AJC service providers meet a minimum performance threshold of 65% across Balanced Scorecard indicators. This threshold includes successful performance in the following core (“no-fail”) measures:

- Job Placements (maximum performance standard)
- Increased Earnings
- Common Measures
- Number of Job Openings
- CAP/WIOA Co-Enrollment Rate
- SNAP/WIOA Co-Enrollment Rate

These “no-fail” measures must be achieved in addition to meeting the overall 65% minimum threshold across all required BSC indicators.

FUNDING: None

PERFORMANCE: WIOA, WP, CAP, SNAP E&T

ATTACHMENT

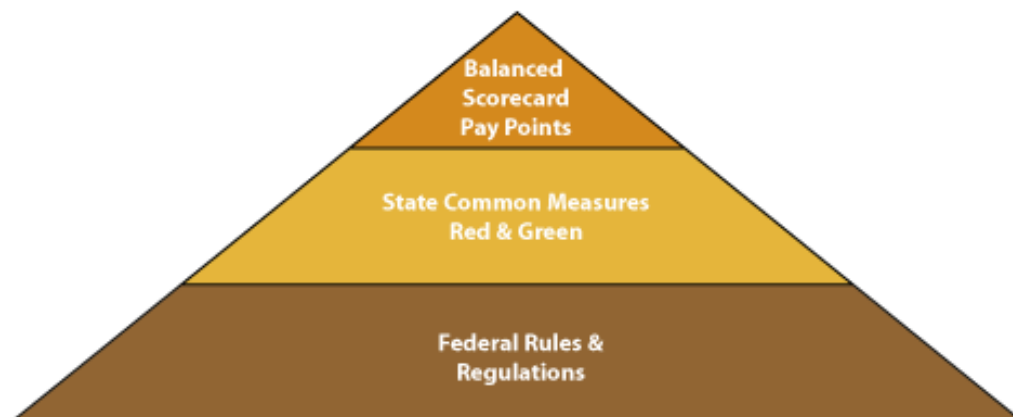
CSSF Specifications for Workforce Services Balanced Scorecard Report

I. PURPOSE

The purpose of the 2025-2026 South Florida Workforce Investment Board's (SFWIB) Balanced Scorecard Report is to strengthen and make the SFWIB's workforce service delivery system more effective and efficient by simplifying complex measures systems, integrating multilevel performance indicators and focusing on the basics such as employment outcome and self-sufficiency. The Balanced Scorecard Report includes a comprehensive Job Placement performance measure that is also used as a payment structure to improve employment opportunities for all jobseekers and increase local businesses' competitive advantage in a global economy.

The SFWIB's performance structure is derived from local, state and federally mandated measures. The comprehensive multilevel performance measures system was used to distinguish the organization's goals and define the Balanced Scorecard's measures. This system shall assist Workforce Development Area 23 (Area 23) in exceeding performance and serving all participants. The graph below illustrates the vertical integration of the multilevel performance measures system.

The Balanced Scorecard Report, along with the other operational reports, acts as a measurement system, strategic management system, and communication tool. It provides a compass for resource allocation to the SFWIB's Contractors by sorting and prioritizing dozens of state and federal mandates. It simplifies the complex and perplexing Workforce performance system, which in turn enhances Contractors' abilities to allocate human capital and financial resources in areas that shall collectively benefit Area 23's performance.



This document describes the specifications for the Balanced Scorecard Report 1) selection criteria, 2) reporting elements, and 3) logic used to obtain the different reporting elements. It is organized in three sections: Job Placements, CSSF Balanced Scorecard Performance Requirement, and Quality Assurance (QA) Key Indicators based on the contract requirements.

II. REPORT METHODOLOGY

Listed below are the SFWIB's methodologies used to define and calculate the performance accountability requirements for Area 23. Data will be obtained from the One-Stop Service Tracking (OSST), Employ Miami-Dade (EMD) and Workforce Management System (WFMS) data warehouse and computed using the following listed methodologies.

Acronyms	Systems	Programs
CMT	Common Measures Tool	WIOA Adult (WIOA AD), WIOA Dislocated Worker (WIOA DW), WIOA Youth, WP
EMD	Employ Miami-Dade	WIOA AD, WIOA DW, Reemployment and Eligibility Assessment (REA), and Wagner Peyser (WP) Programs
OSST	One-Stop Service Tracking	Career Advancement Program and Supplemental Nutrition Assistance Program (SNAP)
WFMS	Workforce Management System	All Programs

A. JOB PLACEMENTS

1) ***Wagner-Peyser (WP) Obtained Employment (OE)***

A Wagner-Peyser (WP) Obtained Employment (OE) refers to those fully (complete and accurate) registered individuals who secure employment within 180 calendar days of receiving one or more services which are wholly or partially funded by the state employment service agency, but the placement does not meet the federal definition for a "WP Placement." Credit for an OE may be claimed for any fully registered participant who has received any WP staff assisted reportable service(s) and has a job start date, where both service and start date fall within 180 days from the date the obtained employment is recorded. A participant must also have

a full EMD registration in the database before the start date of the obtained employment. A complete EMD registration must include all of the following components: a complete and current general information section containing a verified residential and mailing address, a valid telephone number, and e-mail address. The jobseeker must also have been assigned an occupation title and occupation code (O*NET code). Additionally, staff must complete the background wizard section including the education profile, the employment history with previous hourly wages, and O*NET code. To complete the registration, the jobseeker must have an active/online résumé that is viewable to employers, with a valid telephone number and e-mail address. Staff must verify that the jobseeker has started working prior to taking credit for an OE. Notification of a hire date will not suffice for securing OE credit. All participants, as part of their initial EDM registration, will be encouraged to create an email address for use in job placement. If a participant does not have an email address, instructions for creating an account will be provided at the designated CareerSource center resource room.

A job referral is the act of facilitating the match between qualified jobseekers and employers with job openings; and the recording of such referral in EMD. Prior to referring a jobseeker to a job opening, staff must ensure the jobseeker's qualifications match the minimum requirements listed in the job order by ensuring that the general information section, background wizard section, and the résumé on their personal profile includes all the jobseeker's skills; abilities; prior work experience; education and training; and certifications and licensure. These items should be consistent with the requirements of the job order. Staff must ensure that job referrals are only provided to jobseekers that have completed work registration and who meet the minimum requirements as stated in the job order. **At no time should a staff member alter the minimum requirements of a job order to increase a jobseekers skills match.** Additionally, staff must obtain the consent of the jobseeker prior to making any job referral. Staff must enter a case note in EMD to document the consent of the jobseeker.

Data Source: The data will be obtained from EMD and New Hire Reports. EMD OE Service Codes: 880, 881, 882, and 883.

2) ***Wagner-Peyser (WP) Universal Direct Job Placement (DJP)/ Direct Employment***

The SFWIB refers to a WP Placement as a Wagner-Peyser (WP) Direct Job Placement (DJP). A WP Placement as defined by 20 CFR 651.10 is the hiring by a public or private employer of a fully registered individual referred by the employment office for a job or an interview, provided that

the same employment office completed all of the following steps in sequential order from i to vi:

- i. Prepared a job order form prior to referral, except in the case of a job development contact on behalf of a specific applicant;
- ii. Made prior arrangements with the employer for the referral of a fully registered individual or individual(s);
- iii. Obtained the fully registered individual or individual(s) consent to be referred to the job order;
- iv. Referred a fully registered individual in EMD database who may or may not have been specifically designated by the employer, except for referrals on agricultural job orders for a specific crew leader or worker. The registration must be completed prior to the referral;
- v. Verified from an acceptable source (i.e. New Hire Report, Wage Credit, Work Number or Paystub), signed employment verification from the employer that the individual had entered on a job (for staffing agencies the jobseekers must have been assigned to a worksite and have earned wages); Staff must verify the jobseeker began working prior to recording the appropriate placement code. Verification information must be documented and must include a case note identifying:
 - Jobseeker's Name
 - Position jobseeker was hired for
 - Name of company
 - Source of Verification - Representative's Name & Title
 - Start Date (Current Employment Began/Start Date)
 - Rate of Pay/Salary per Hour

(Notification of an upcoming start or hire date is not acceptable for recording a placement).

- vi. Appropriately recorded the placement and submitted a signed employment verification to SFWIB/CSSF at the time of invoicing; failure to submit employment verification at the time of invoicing will result in an automatic disallowance of unverified placements. Submitting falsified verifications will be a disallowance and may lead to Contract termination;
- vii. For all placements with a staffing agency or other similar type of employer that provides contracted or temporary labor; staff must also obtain documentation (i.e. pay stub or payroll register) that authenticates the participant was assigned to a worksite and earned wages. The first pay stub after start date is preferred;

- viii. Pursuant to 20 CFR 652.3, staff must ensure the O*NET code used for a specific job opening matches the job description. If no match can be found, staff must use the title the employer or third party agency provided. Only one O*NET code may be used per job order. Placement into job openings that do not match the description in the job order or O*NET code is not permitted.

The SFWIB requires that the above steps ii through viii be completed in sequential order and by the same center location. Failure to comply with this requirement will result in the placement being disallowed. If a placement is disallowed that placement will be removed from the CSSF Balance Scorecard Performance Requirement (Attachment 3 of Exhibit A, Statement of Work) and all other SFWIB Reports.

A WP DJP includes a Wagner-Peyser (WP) Job Development Placement. Title 20 Part 651.10 of the Code of Federal Regulations provides that a job development means the process of securing a job interview with a public or private employer for a specific applicant for whom the local office has no suitable opening on file.

If there is no suitable opening on file in the job bank system, staff should make job development attempts (contacts) on behalf of the jobseeker. The job development attempt should be recorded on the jobseeker's activity service plan in EMD (service code 123 – Job Development Contact). Job development attempts should be documented on the jobseeker's case notes screen in accordance to the EFM Service Code Guide.

If staff later learns that the jobseeker was hired on the job to which a job development attempt was made, then the staff person should write a job order and take credit for the placement. Once the job order is written to reflect the hire, it must be matched against the job development referral that was previously entered on the jobseeker's services screen.

Data Source: The data will be obtained from EMD. EMD Service Codes: 750, 752, 753, 754, 760, 762, 764, 766, 770, 772, 774, 776, 780, 850, 852, 854, 856, 860, 862, 864, 866, 870, 872, 874, and 879.

Note: A DJP is referred as a Direct Job Placement

3) ***Types of DJPs***

i. ***Universal***

A Universal DJP refers to a WP jobseeker, fully registered in EMD, that secures a job placement by meeting the federal definition for a "Direct Job Placement," it is not a WIOA enrolled participant and does

not meet the criteria for any of the other seven types of DJP. The WP DJP must be recorded in EMD during the reporting period. The WP referral create date must be on or prior to the employment start date. Note: If the DJP is a WP Job Development, then the job development contact (activity code 123) must be on or prior to the hire date. A center may not exceed more than thirty-two percent (32%) of their monthly DJP number in this category. All placements entered in a given quarter that exceed the maximum number in one of the above mentioned categories will be counted for performance measures only and NOT for payment.

Data Source: The data will be obtained from EMD WP.

ii. ***WIOA Individualized Adult/Dislocated Worker (DW)***

A WIOA Individualized Adult or DW DJP refers to an eligible fully registered WIOA Adult or DW Participant in EMD that secures a DJP with the WP referral creation date established after the WIOA eligibility/enrollment date. Additionally, the hire date and referral create date and/or the WIOA eligibility/enrollment dates do not occur on the same date. The WP DJP result date must be recorded in EMD WIOA during the WIOA participation period before the program's exit. The referral and placement must be to a full-time job greater than 150 days in duration.

Note: If the DJP is a WP Job Development, then the WIOA eligibility/enrollment date must be prior to the job development contact (activity code 123).

Data Source: The data will be obtained from EMD WP and WIOA.

iii. ***WIOA Individualized Jobseekers with Disabilities***

A WIOA Individualized Jobseeker with a Disability refers to an eligible fully registered WIOA Adult or DW Participant that is identified in EMD to have a disability and secures a DJP with the WP referral creation date established after the WIOA eligibility/enrollment date. Additionally, the hire date and referral create date and/or the WIOA eligibility/enrollment dates do not occur on the same date. The WP DJP result date must be recorded in EMD WIOA during the WIOA participation period before the program's exit. The referral and placement must be to a full-time job greater than 150 days in duration.

Note: If the DJP is a WP Job Development, then the WIOA eligibility/enrollment date must be prior to the job development contact (activity code 123).

Data Source: The data will be obtained from EMD WP and WIOA.

iv. ***WIOA Individualized Veterans or Ex-Offenders***

A WIOA Individualized Veteran or Ex-Offender refers to an eligible fully registered WIOA Adult or DW Participant that is identified in EMD as a Veteran or an Ex-Offender and secures a DJP with the WP referral creation date established after the WIOA eligibility/enrollment date. Additionally, the hire date and referral create date and/or the WIOA eligibility/enrollment dates do not occur on the same date. The WP DJP result date must be recorded in EMD WIOA during the WIOA participation period before the program's exit. The referral and placement must be to a full-time job greater than 150 days in duration.

Note: If the DJP is a WP Job Development, then the WIOA eligibility/enrollment date must be prior to the job development contact (activity code 123).

Data Source: The data will be obtained from EMD WP and WIOA.

v. ***WIOA Individualized Reemployment Assistance (RA) Claimant or Homeless Person (HP)***

A WIOA Individualized Reemployment Assistance (RA) Claimant refers to an eligible fully registered WIOA Adult or DW Participant that is identified in EF or the State RA system as a recipient of Reemployment Assistance and secures a DJP with the WP referral creation date established after the WIOA eligibility/enrollment date. Additionally, the hire date and referral create date and/or the WIOA eligibility/enrollment dates do not occur on the same date. A Homeless Person refers to an eligible WIOA Adult that is identified in EMD as meeting the United States Department of Housing and Urban Development's definition of a Chronically Homeless Person at the time of registration and secures a DJP with the WP referral creation date established after the WIOA eligibility/enrollment date. Additionally, the hire date and referral create date and/or the WIOA eligibility/enrollment dates do not occur on the same date. The WP

DJP result date must be recorded in EMD WIOA and occur within six (6) months of the WIOA application date. The referral and placement must be to a full-time job greater than 150 days in duration.

Note: If the DJP is a WP Job Development, then the WIOA eligibility/enrollment date must be prior to the job development contact (activity code 123).

Data Source: The data will be obtained from EMD WP and WIOA.

vi. ***WIOA Individualized TANF/Career Advancement Program (CAP) or Supplemental Nutrition Assistance Program (SNAP)***

A WIOA Individualized TANF/Career Advancement Program (CAP) or Supplemental Nutrition Assistance Program (SNAP) DJP refers to an eligible fully registered WIOA Adult or DW Participant that is identified in OSST as a CAP or SNAP participant and secures a DJP with the WP referral creation date established after the WIOA eligibility/enrollment date. Additionally, the hire date and referral create date and/or the WIOA eligibility/enrollment dates do not occur on the same date. The WP DJP result date must be recorded in EMD WIOA during the WIOA participation period before the program's exit. The referral and placement must be to a full-time job greater than 150 days in duration.

Note: If the DJP is a WP Job Development, then the WIOA eligibility/enrollment date must be prior to the job development contact (activity code 123).

Data Source: The data will be obtained from EMD WP, EMD WIOA, OSST CAP, and OSST SNAP.

Criteria for a WIOA Individualized TANF/CAP DJP: Employment information shall also be recorded in OSST and the hire date must be after a full month of CAP mandatory participation period before the CAP program's closure and during the reporting period. If the placement occurs during the first month in CAP, at least one hour of participation must be recorded in OSST.

Criteria for a WIOA Individualized SNAP DJP: SNAP participants with an employment hire date on or after being actively engaged in a qualifying SNAP component with at least one JPR hour recorded in

OSST during the reporting period. Employment information shall also be recorded in OSST.

B. CSSF BALANCED SCORECARD PERFORMANCE REQUIREMENTS

1) *Placements (Direct Job Placements & Obtained Employment) **

Employment (Obtained Employment and Direct Job Placements) reflects the total number of Direct Job Placements (DJPs) and Obtained Employment (OEs) in EMD during the reporting period.

Data Source: The data will be obtained from EMD.

2) *Increased Earnings **

Increased Earnings reflects the average earnings gain for participants in the following funding streams: WIOA Adult, WIOA Dislocated Worker, and Wagner-Peyser. The average earnings gain is derived from the salary variance between pre-wage and post-wage times average hours worked in a year

Salary variance (post-wage – pre-wage) x Average number of hours worked (2080)

Data Source: The data will be obtained from EMD and Work Number.

3) *Common Measures **

Common Measures reflects the percentage of federal indicators or performance exceeded based on the Common Measures Tool (CMT). Percentage will reflect the exceeding of measures in the following categories:

Adults

- Entered Employment Rate, Median Earnings, Credential Attainment, Measurable Skills Gain

Dislocated Workers

- Entered Employment Rate, Median Earnings, Credential Attainment, Measurable Skills Gain

Wagner-Peyser

- Entered Employment Rate & Median Earnings

Data Source: Data will be obtained from the CMT.

4) *Number of Job Openings* *

Number of Job Openings reflects the number of staff-initiated job openings from the job orders in the Job Order Index measure. The job orders to be excluded in the measure are those on hold.

Data Source: The data will be obtained from the EMD system.

5) *Number of Level 1 Business Services*

Employers Served with Level I Services reflects the total number of the new employers that have received a Level I Service that is recorded in EMD for the first time during the Program Year (PY) for the Region.

Level I (Highest Service Level): Includes services such as pre-screening; job orders; veteran services; customized training; job referrals/placements, job fairs; on-site workshops for recruitment/retention.

Data Source: The data will be obtained from EMD

6) *CAP/WIOA Co-Enrollments* *

The CAP/WIOA Co-Enrollments measure tracks the integrated service delivery between the Temporary Assistance for Needy Families (TANF) program and the Workforce Innovation and Opportunity Act (WIOA). This measure requires that at least **75%** of TANF participants be **co-enrolled** in one or more WIOA-funded programs, such as Title I Adult, Dislocated Worker, or Youth services.

Data Source: The data will be obtained from CAP Review Tool (Cumulative Report).

7) *SNAP/WIOA Co-Enrollments* *

The SNAP/WIOA Co-Enrollments measure tracks the integrated service delivery between the Supplemental Nutrition Assistance Program (SNAP) and the Workforce Innovation and Opportunity Act (WIOA). This measure

requires that at least **75%** of TANF participants be **co-enrolled** in one or more WIOA-funded programs, such as Title I Adult, Dislocated Worker, or Youth services.

Data Source: The data will be obtained from SNAP Review Tool (Cumulative Report).

8) Work-Based Training (Training Enrollments)

Training Enrollments Rate reflects the number of WIOA eligible participants enrolled and attended in qualified WIOA ITAs, On-the Job Training (OJT), and Paid Work Experience (PWE) in EMD and WFMS for the reporting period.

Data Source: The data will be obtained from EMD and WFMS.

9) CAP All Family Participation Rate

CAP All Family Participation Rate reflects the total number of families (mandatory participants) receiving TANF including a work eligible adult or minor head-of-household who is engaged in work activity for the month divided by the total number of mandatory participants receiving Temporary Cash Assistance (TCA).

The total # of CAP mandatory participants engaged in a Federal allowable countable activity.

Divided by the total # of CAP mandatory participants receiving TCA.

Data Source: The data shall be obtained from the OSST.

10) Career Advancement Program (CAP) Entered Employment Rate (EER)

Career Advancement Program (CAP) Entered Employment Rate (EER) reflects the number of all CAP mandatory cases that close with employment divided by the total number of closures within the reporting period.

The total # of all mandatory cases that close with employment.

Divided by the total # of mandatory cases that close within the reporting period.

Data Source: The data shall be obtained from the OSST system.

11) Supplemental Nutrition Assistance Program (SNAP) Entered Employment Rate (EER)

Supplemental Nutrition Assistance Program (SNAP) Entered Employment Rate (EER) reflects the number of all SNAP mandatory cases that close with employment divided by the total number of closures within the reporting period.

The total # of all mandatory cases that close with employment.

Divided by the total # of mandatory cases that close within the reporting period.

Data Source: The data shall be obtained from the OSST system.

12) Wagner Peyser (WP) Entered Employment Rate (EER)

Wagner Peyser (WP) Entered Employment Rate (EER) reflects the number of all Wagner-Peyser participants unemployed at enrollment that were placed at exit divided by all the WP participants unemployed at enrollment that have exited. Exits are defined as participants who have not had a service within three (3) months from the last reportable service.

The total # of all WP participants placed at exit.

Divided by the total # of all WP participants who exit.

Data Source: The data shall be obtained from the EMD WP.

13) WIOA Adult and Dislocated Worker Entered Employment Rate (EER)

WIOA Adult and Dislocated Worker Entered Employment Rate (EER) reflects the percent of those WIOA Adult and Dislocated Worker participants unemployed at registration and placed at exit divided by all the Adult and Dislocated Worker participants unemployed at registration who exit.

The total # of all Adult participants placed at exit.

Divided by the total # of Adult and Dislocated Worker participants who exit.

Data Source: The data shall be obtained from the EMD WIOA.

14) Short-term Veterans Entered Employment Rate (EER)

Short-term Veterans Entered Employment Rate (EER) reflects the number of exiting Veterans who were placed in EMD in the 90 days following their exit

date divided by the number of Veteran participants who were unemployed at their date of participation and were exited after 90 days.

The total # of exiting Veterans who were placed within 90 days of the exit date.

Divided by the total # of Veteran participants who were unemployed at their date of participation and were exited after 90 days.

Data Source: The data shall be obtained from the EMD.

15) *Average Days to Employment*

Average Days to Employment is defined as the total number days it takes a jobseeker to attain employment after registering in EMD. The measure will consider both Direct Job Placements and Obtain Employment, after the WP EMD registration/participation date. All hire dates shall be within the reporting period.

Data Source: The data shall be obtained from the EMD systems.

16) *Employment /Job Placement Average Wage*

Employment/Job Placement Average Wage reflects the sum of the hourly wages of all the WP Job Placements (DJP's only) divided by the number of WP Job Placements in EMD during the reporting period.

The sum of the hourly wages (DJP's only).

Divided by # of WP job placements.

Data Source: The data will be obtained from EMD WP DJPs.

17) *Cost per Placement*

Cost per Placement reflects the total contract award earned plus the WFMS allocations (obligated and paid) and share of facilities cost divided by the total number of Job Placements.

The total contract award earned plus the WFMS allocations (obligated and paid) and share of facilities cost.

Divided by the total # of Job Placements.

Data Source: The job placement information is obtained from EMD.

18) *Net Economic Benefit*

Net Economic Benefit reflects the Annual Placement Average Wage subtracted by the Cost per Placement.

$(\text{Placement Avg. Wage} \times 2080 \text{ hours}) - (\text{Cost per Placement}) = (\text{The Net Economic Benefit per Placement})$.

Data Source: The job placement information is obtained from EMD.

19) *Return on the Investment*

Return on the Investment reflects the Net Economic Benefit per Placement divided by the Cost per Placement.

The Net Economic Benefit per Placement.

Divided by the Cost per Placement.

Data Source: The placement information is obtained from EMD.