

Finance Council Meeting

May 20, 2025

Welcome and Remarks



Kevin McDonald

Chair

FOR PUBLIC COMMENT:

Please see Madison Frazee for a Public Comment card and wait to be recognized by the Chair.

Chief Financial Officer Introduction and Welcome



Dana Davis

Chief Financial Officer

Consent Item

For Consideration:

- Approval of February 19, 2025, Joint Council Meeting Minutes, to include any modifications or changes noted by the board.

CareerSource Florida Financial Operations Update



Dana Davis

Chief Financial Officer

Actual Expenditures vs. Budget – Projected FY 2024-25

| | Projected FY 2024-25 | 2024-25 Budget | Projected Variance | % of Budget |
|--------------------|----------------------|----------------|--------------------|-------------|
| Total Expenditures | \$4,290,947 | \$4,666,398 | \$375,451 | 92.0% |

Annual Expenditures – Projected 2024-25 vs. Actual for FY 2023-24 | FY 2022-23 | FY 2021-22

| | Projected FY 2024-25 | Actual FY 2023-24 | Actual FY 2022-23 | Actual FY 2021-22 |
|--------------------|----------------------|-------------------|-------------------|-------------------|
| Total Expenditures | \$4,290,947 | \$3,951,015 | \$4,151,708 | \$4,016,594 |

Budget History – DRAFT 2024-25 vs. Actual for FY 2024 | FY 2023 | FY 2022

| | DRAFT FY 2025-26 | Enacted 2024-25 | Enacted 2023-24 | Enacted 2022-23 |
|--------------------|------------------|-----------------|-----------------|-----------------|
| Total Expenditures | \$4,831,990 | \$4,666,398 | \$4,782,785 | \$4,492,124 |

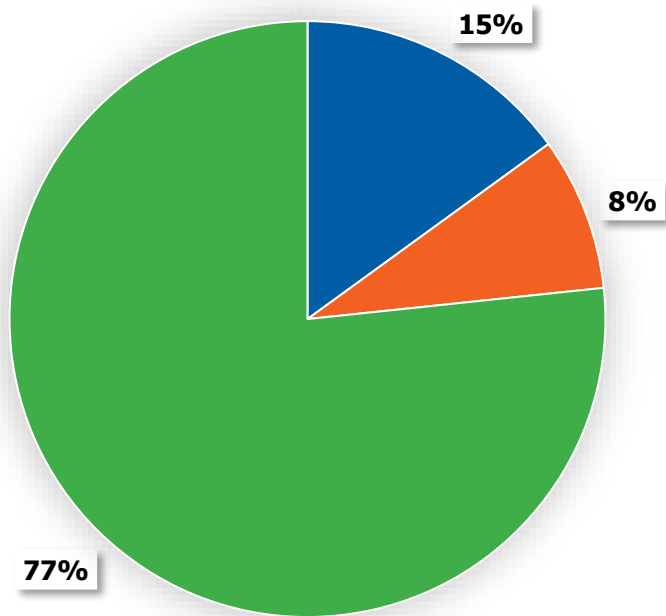
Major Funding Sources

- Workforce Innovation and Opportunity Act (WIOA)
- Temporary Assistance for Needy Families (TANF)
- Wagner-Peyser Act (WP)
- Quick Response Training (QRT)

| Source | Fiscal Year 2025-2026 | Fiscal Year 2024-2025 | Difference | % Change |
|--------|-----------------------|-----------------------|-------------|----------|
| WIOA | \$111,955,579 | \$112,890,687 | (\$935,108) | (0.83%) |
| TANF | \$57,786,605 | \$57,786,605 | \$0 | 0.000% |
| WP | \$38,374,546 | \$38,458,248 | (\$83,702) | (0.22%) |
| QRT | \$7,500,000 | \$7,500,000 | \$0 | 0.000% |

2025-2026 WIOA Funding

Total \$111,955,579



- State Set-Aside - \$16,793,335
- Rapid Response - \$9,322,441
- Local Board Allocations - \$85,839,803

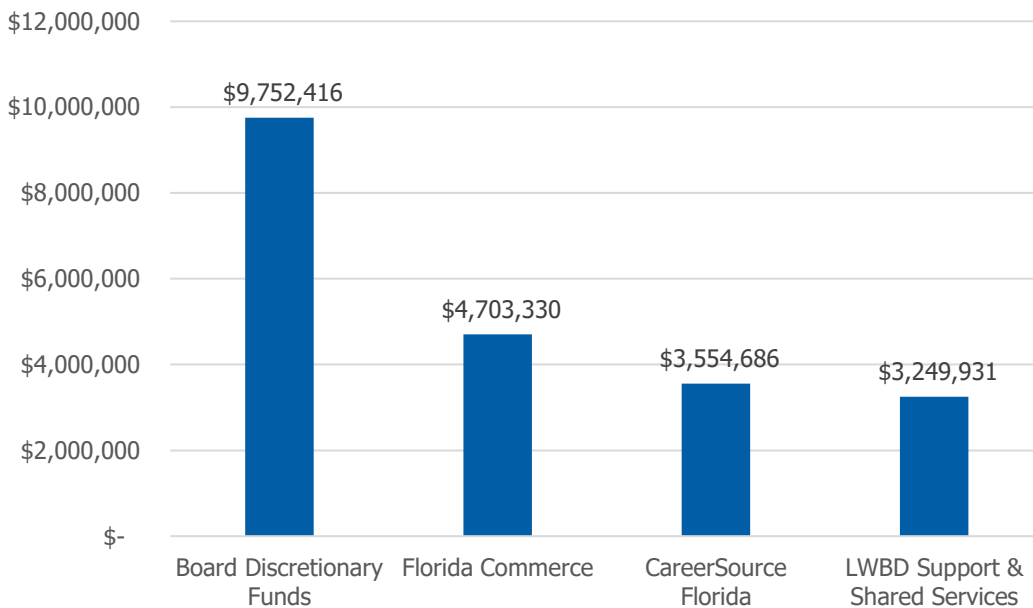
Total State Set-Aside

Total WIOA Set-Aside Funds \$16,793,335

Recaptured Funds \$4,467,028

Total WIOA Set-Aside \$21,260,363

Funding Allocations



Total Available – Board Discretion

| | |
|----------------------------|--------------------|
| Total WIOA Set-Aside | \$21,260,363 |
| FloridaCommerce Admin | (\$4,703,330) |
| CareerSource Florida Admin | (\$3,554,686) |
| LWDB Support & Shared Svc. | (\$1,749,931) |
| CSF Statewide Outreach | (\$1,500,000) |
| Net Funds Available | \$9,752,416 |

Program Allocations

- Incumbent Worker Training: \$3,000,000
- Sectors of Strategic Focus Training: \$3,000,000
- Rural Workforce Initiatives: \$2,000,000
- Advancing Florida's Workforce System: \$750,000
- Youth Career Exploration: \$750,000
- Workforce Summit: \$140,000

2025-2026 Wagner-Peyser Act 7(a) Funds

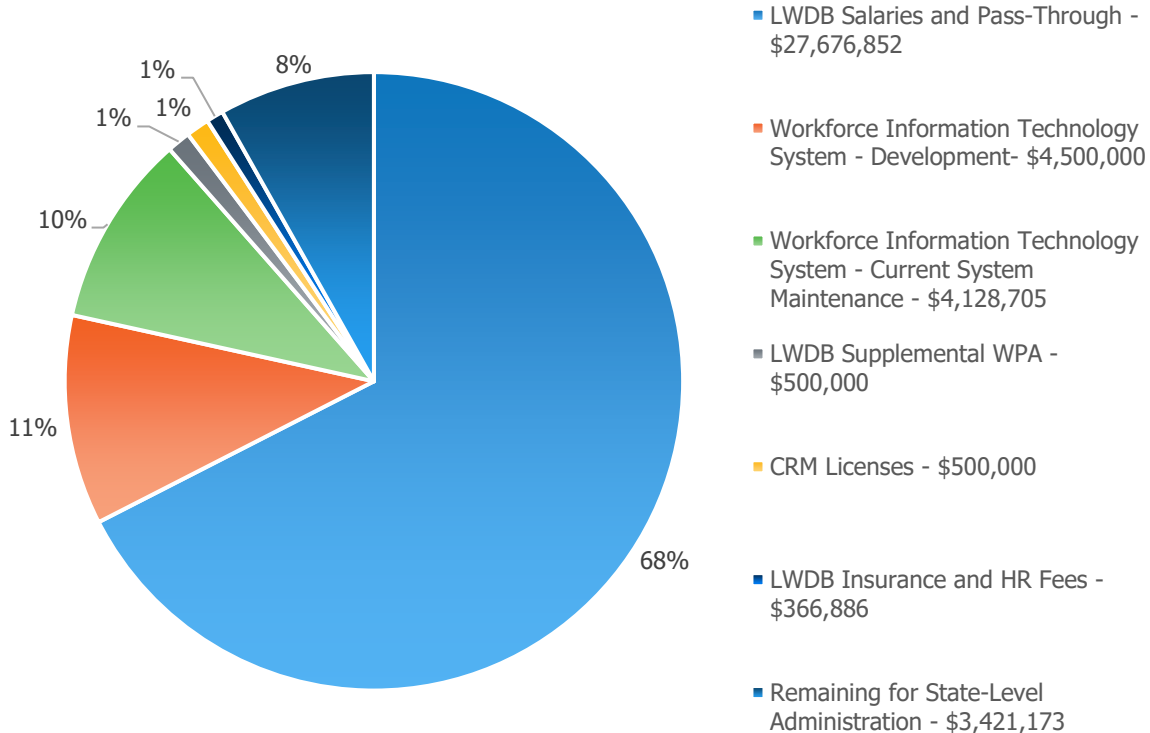
Total WP 7(a) Available Funds

Total PY 2024 Funding \$34,537,091

Florida Commerce Carryover \$6,481,193

Total Available Funding \$41,018,284

Funding Allocations



2025-2026 Wagner-Peyser Act 7(b) Funds

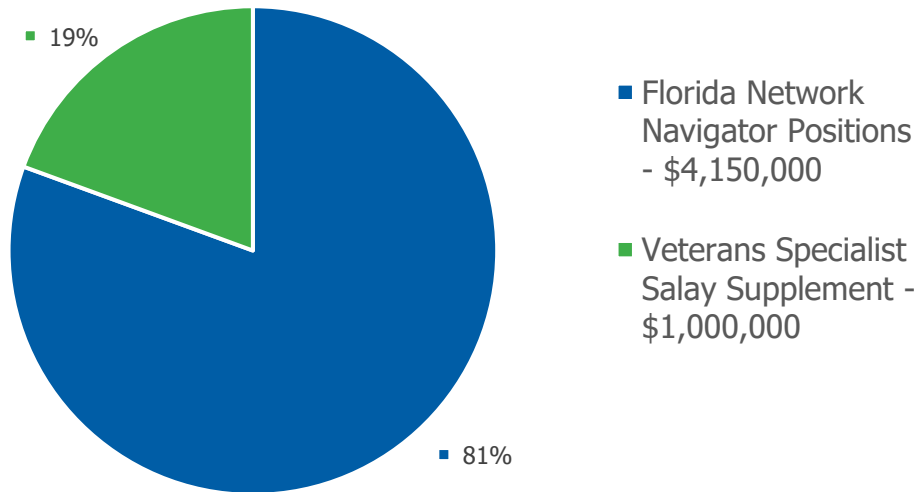
Total WP 7(b) Available Funds

Total PY 2024 Funding \$3,845,825

Florida Commerce Carryover \$1,304,175

Total Available Funds \$5,150,000

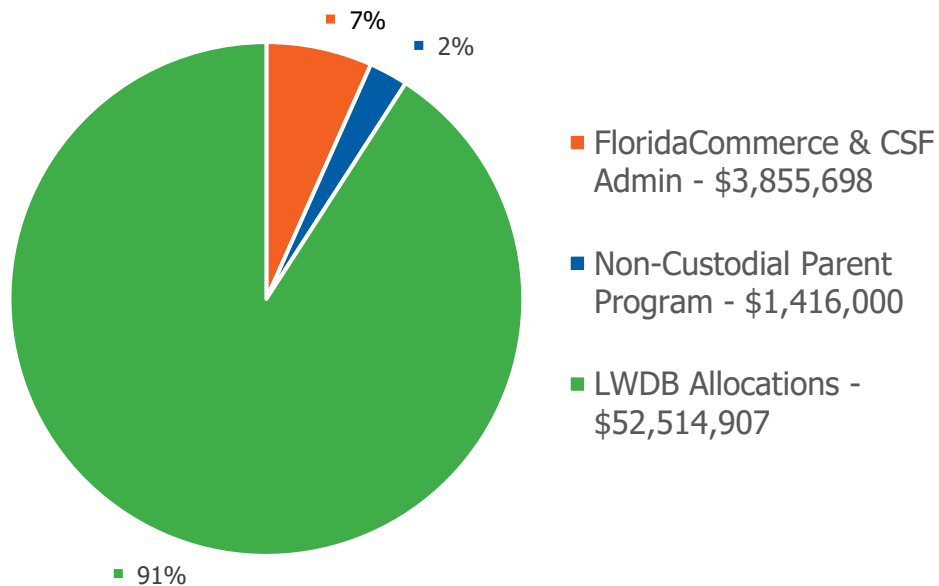
Funding Allocations



Total TANF Available Funds

Total Appropriation \$57,786,605

Funding Allocations



Action Item

Fiscal Year 2025-26 CareerSource Florida Network Funding



Dana Davis, CPA

Chief Financial Officer, CareerSource Florida

Action Item

For Consideration:

- Approval to establish the Program Year 2025 WIOA state-level projects for the CareerSource Florida Board of Directors for consideration.
- Approve sending the allocation methodology as proposed for the distribution of TANF funding for Fiscal Year 2025/26 to the CareerSource Florida Board of Directors for consideration.
- Approve sending the Program Year 2025 Wagner-Peyser 7(b) state-level activities to the CareerSource Florida Board of Directors for consideration.

Report on Programmatic Funding Sources Analysis

May Board of Directors Finance Council Meeting

PROGRAMMATIC FUNDING SOURCES ANALYSIS OVERVIEW

CareerSource Florida is working towards **Advancing Florida's Workforce System** through a variety of System-Wide Improvements (SWIs). One of which is to evaluate, understand, and analyze how Local Workforce Development Boards (LWDBs) charge time to prevalent grant sources and identify opportunities to enhance the longevity and efficiency of grant funding.

Goal:

To understand processes, best practices, limits, and perceptions for charging customer support activities to workforce programs to optimize how local area program budgets are leveraged and to serve job seekers more effectively.

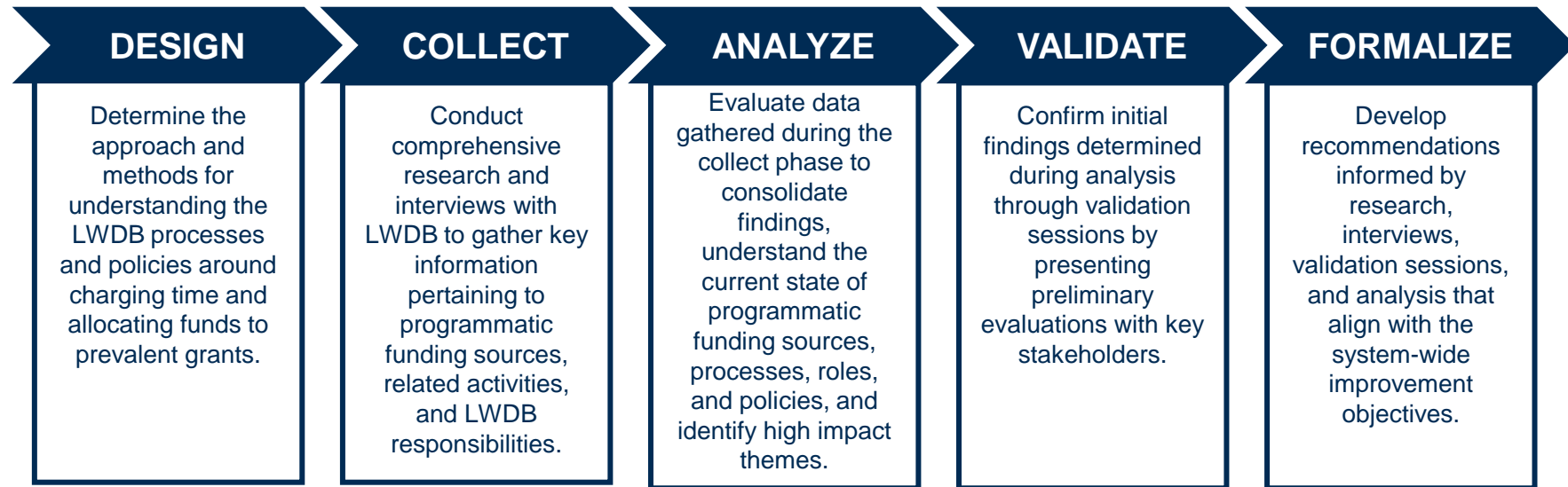
Objectives:

- ✓ Increase the longevity of available program funding.
- ✓ Clarify understanding of state-level procedures and promote accurate charging insights.
- ✓ Enhance program charging practices across the workforce system.

In support of FloridaCommerce and the LWDBs throughout the state, **CareerSource Florida sought to better understand how time directly supporting customers is charged to workforce programs within the systems of record.** The efforts for this SWI occurred from August 2024 through December 2024.

PROGRAMMATIC FUNDING SOURCES ANALYSIS APPROACH

Through a five phased approach for the Programmatic Funding Sources Analysis, CareerSource Florida and EY gained insight into the current state, gage reactions to new ways of working, and provide recommendations for CareerSource Florida leadership's consideration.



PROGRAMMATIC FUNDING SOURCES ANALYSIS RECOMMENDATIONS

The following recommendations were produced from the Programmatic Funding Sources Analysis for CareerSource Florida's consideration:

Adopt and implement an Integrated Service Delivery (ISD) model policy

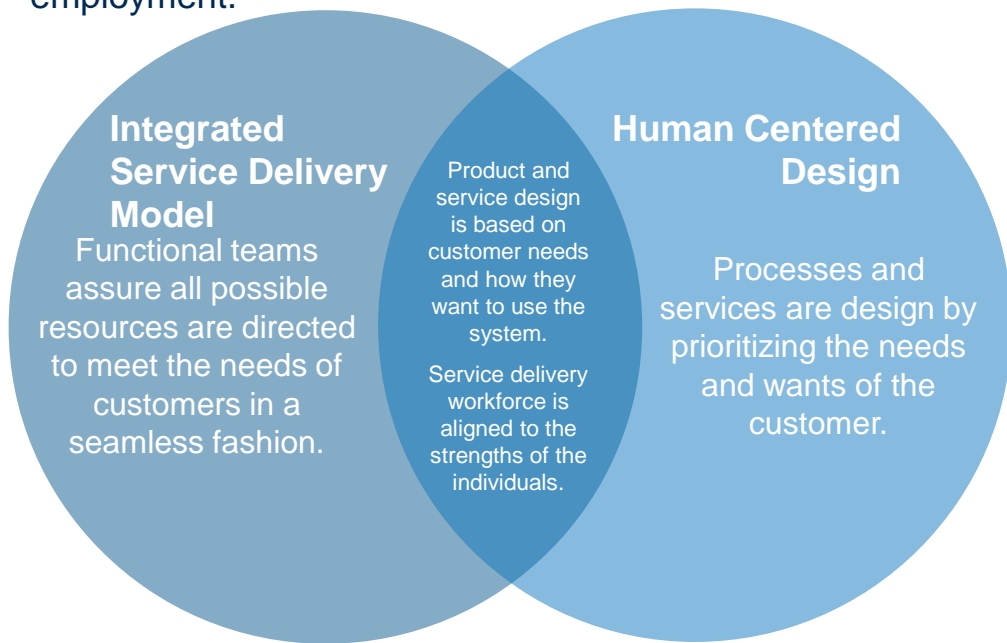
Update FloridaCommerce SNAP Funding Crosswalk

Utilize state procured technology, tools and services

Perform a job role and title assessment across the 21 LWDBs

WASHINGTON'S INTEGRATED SERVICE DELIVERY (ISD) MODEL

ISD is the alignment of resources with workforce system partners to address the training and employment needs of customers in an efficient and collaborative manner. The goal is to encourage more job seekers to take advantage of as many services as necessary to will help them engage and achieve their goals for employment.



Services in Integrated Service Delivery:

1. Reimagined case management
2. More frequent and new additions for workshops
3. More engagement with job seekers and attachment to services
4. New and greater use of technology
5. More partners providing more services to fill in the specialized needs of customers
6. Robust menu of services focused on skill development and certification

Source: [Workforce Professionals Center – Connecting ISD, Human Centered Design and Lean](#)

Source: [Workforce Professionals Center - Understanding ISD with Co-Enrollment](#)

WASHINGTON'S INTEGRATED SERVICE DELIVERY (ISD) MODEL

WIOA advances the prioritization of services for individuals with barriers to employment and endorses universal access to basic and individual career services. The co-enrolled ISD model allows workforce development boards to do both.

In Washington, the model prioritized keeping job seekers, businesses, and the community at the center of service delivery.



A group of local Workforce Development Councils throughout the state of Washington worked with Employment Security and the State Workforce Board to develop this approach. Each local workforce area decides whether and when to implement ISD with co-enrollment.

Washington's ISD initiative began in 2016 with the formation of a Common Intake Committee and the Integrated Service Delivery Workgroup as a part of the Integrated Data Sharing project that contributed to streamlining processes.

In addition to Washington, several states are using or in the process of developing an ISD model including Oregon, Texas, California, New York, Michigan, Indiana, Missouri, North Carolina, Tennessee, Louisiana and Utah.

Many local areas that use a co-enrolled ISD model have been successfully leveraging the model for **grant development, expansion of community partnerships, and designing effective group-base or cohort-base services** for job seekers, and as a result expanding the resources available for job seeker services.

Source: [Workforce Professionals Center - Integrated Service Delivery](#)

Source: [Policy Level - WD - WFDev No-Wrong Door Integrated Data](#)

THANK YOU!

QUESTIONS AND ANSWERS

CareerSource Florida Grants Management Update



Malissa Counts

Grants Manager

Training Grants Administration

Incumbent Worker Training

**50
Contracts**

**2,720
Trainees**

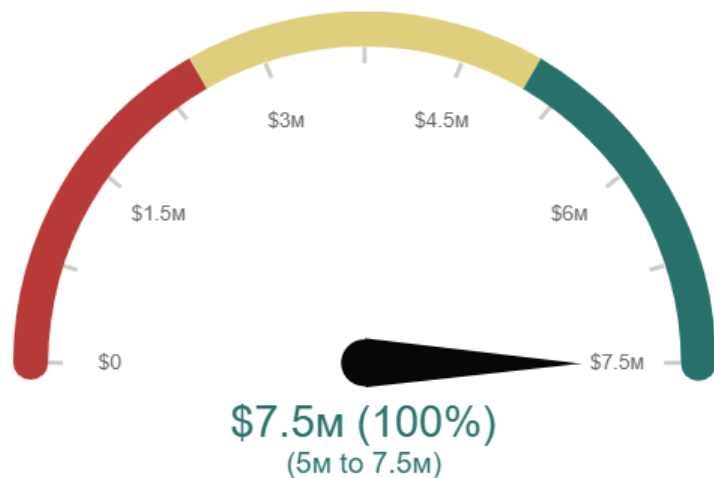


Training Grants Administration

Quick Response Training

**27
Contracts**

**2,236
Trainees**



Business Spotlight: Scotlynn

QRT & IWT Recipient



Beth Ackley

Scotlynn

SCOTLYNN PEOPLE DRIVE US



Why Choose a Career in LOGISTICS

\$10T

Logistics is a 10 trillion-dollar industry.

As an industry it's simply not going anywhere. A career in logistics means ongoing opportunities for career progression.

79%

Top rated, RECESSION PROOF sector.

CSCMP found that 79% of those working in logistis were satisfied with their jobs.



MILLION

9



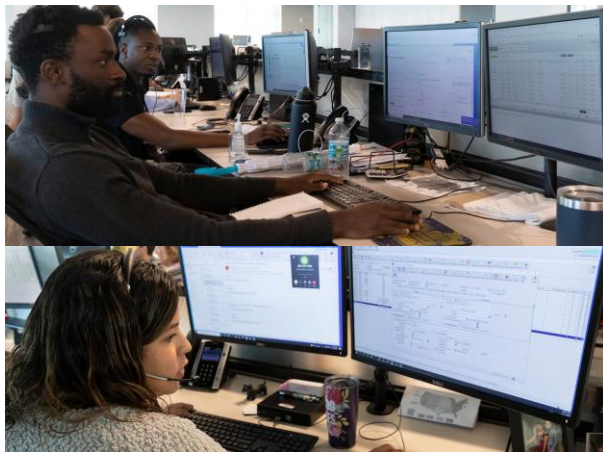
Logistics / Supply Chain is growing.

Which means more opportunities for you. More that 9 million people work in logistics today.

#26

The World Report listed transportation logistics

jobs as #26 on its Best Business jobs.



Roadmap to Success

EXPONENTIAL GROWTH

Since launching in 2010, revenue and the number of employees has almost doubled every three years.



Second billion in revenue
earned 1.5 years later

2022

Moved into new
HQ in Fort Myers

2021

Added office in Tampa

2016

Added office in
Indianapolis

2014

Scotlynn was founded
in Fort Myers, Florida

2010

Purchased
Fort Myers
North office

2012

Added additional office
in Fort Myers

2017

First \$1B earned in
revenue 2010 - 2020

2020

2024

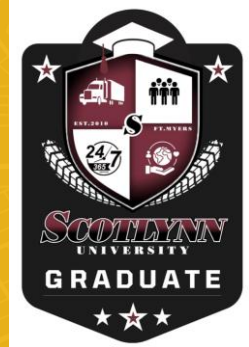
Over 389 employees in the USA,
over 600 company-wide

How Scotlynn Uses Grant Dollars

- ✓ Five-day New Hire "classroom style" training
- ✓ Extensive 6-8 month mentor-based training as a Trainee
- ✓ 30, 60 & 90-day skill and coaching reviews
- ✓ 9+ months OJT sales hybrid training (digital coaching series with General Manager classroom time)
- ✓ Digital Badges for capability/skill building achievements



Credentialing/Badging



Logistics Account Manager Learning Journey



Scotlynn's Performance

| | 2021 | 2022 | 2023 | 2024 | 2025 – Q1 |
|-----------------------|---------|---------|---------|---------|-----------|
| Market Volatility | | | | | |
| Business Performance | | | | | |
| Hired | 201 | 236 | 171 | 227 | 132 |
| Turnover | 123/42% | 159/42% | 171/39% | 153/29% | 51/11% |
| Industry BLS Turnover | ~50% | 13% | 49% | 31% | |
| Headcount Growth | 64 | 69 | (12) | 28 | 17 |

Since 2019:

4 requests

\$1,401,000 Awarded to Scotlynn

\$825,400 (59%) Reimbursed

Submitting QRT 2025

In 2024, introduced formal Career Path: LAMT, LAM, Senior LAM

2024 Formally Tracking Promotions: 188 or 52% of workforce within new career path

**Thank you for your
support ...**

Questions?

OPEN DISCUSSION AND PUBLIC COMMENT

Closing Remarks



Kevin McDonald

Chair