



WORKFORCE DEVELOPMENT BOARD, INC.

Building a world class workforce

AGENDA

Finance & Personnel Committee Meeting

2:30 pm Friday, June 12, 2026

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Meeting ID: 257 641 931 795 82

Passcode: T52sz6mE

Required	Present	Others	Present
Jose Martinez, Chair		Amanda Hodge, Dean Dorton	
Tony Beregszazi		Anthony Snyder, FVWDB	
Brad Grant			

** A Total of 2 members required for quorum*

Our Mission:

Working collaboratively in our communities to create and sustain a fully engaged, talented workforce for tomorrow, and beyond.

1. Call to Order

CONSENT AGENDA (Action Item)

2. Approval of Agenda
3. Approval of Minutes from 5/14/26 Finance & Personnel Committee Meeting
4. Program Year 2024/2025 Fiscal Monitoring of Subrecipient Completed
5. Board 401(k) Monthly Statement – May 2026
6. Creative Planning, 401(k) ADV Part 2A Disclosure Form

COMMITTEE BUSINESS & DISCUSSION

7. Update on Cost Allocation Project
8. Program Year 2026 Preliminary Budget (Action Item)

REVIEW AND APPROVALS (Action Item)

9. Board Financial Report
 - a) April 2026
10. Checks Over \$5,000 Report
 - a) April 2026
11. Credit Card Statement
 - a) April 2026
 - b) May 2026

12. Round Robin on Workforce Issues

13. Adjournment

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