



**State of Florida
Department of Children and Families**

Ron DeSantis
Governor

Taylor Hatch
Secretary

DATE: June 21, 2025

TO: Community Directors
Community-Based Care (CBC) Lead Agency CEO's

THROUGH: Brooke Bass, Deputy Assistant Secretary of Operations
Amanda VanLaningham, Deputy Assistance Secretary of Administration

FROM: Kate Williams, Deputy Secretary, Department of Children and Families ^{KW}

SUBJECT: Guidance on the Needs Assessment to be completed for young adults in and entering Extended Foster Care effective July 2025.

PURPOSE: The purpose of this memorandum is to provide guidance on implementation of the Standardized Needs Assessment for Extended Foster Care (EFC) that will take effect July 1, 2025.

BACKGROUND: S. 39.6251, F.S., states that a young adult, while in EFC, will live in an independent living environment that offers, at a minimum, life skills instruction, counseling, educational support, employment preparation and placement, and development of support networks. The determination of the type and duration of services shall be based on the young adult's individual needs, interests, and input and must be consistent with the goals set in the young adult's case plan. At present, the financial resources are documented in a Shared Living Plan for each EFC placement; however, there is no standardized assessment to determine and record the assessed financial need for each young adult.

NEW INFORMATION: Effective July 1, 2025, CBC lead agencies must begin to utilize the Department approved standardized needs assessment and corresponding guide for young adults participating in EFC. The purpose of a needs assessment is to determine the level of support provided to the young adult specifically as it relates to financial support based on their needs and strengths and to assist with determining the allowance amount, if any. The young adult's basic needs should be met, and the allowance amount determined will be for discretionary expenses.

The Department has also created a guide for child welfare professionals to utilize when completing the needs assessment. The guide mirrors the structure of the Needs Assessment to detail the factors that should be taken into consideration under each section. The determined amounts for housing, basic needs, allowance, and other expenses should then be detailed in the financial resource section of the Shared Living Plan.

The needs assessment should be completed for current and incoming EFC young adults. Discussions surrounding income and assets, expenses, housing and basic needs should occur on a regular basis with the young adult but may not require a monthly update to the needs

2415 North Monroe Street, Suite 400, Tallahassee, Florida 32303-4190

Mission: Work in Partnership with Local Communities to Protect the Vulnerable, Promote Strong and Economically Self-Sufficient Families, and Advance Personal and Family Recovery and Resiliency

assessment. A new needs assessment should be completed at **minimum every 6 months** or whenever there is a change in circumstance including, but not limited to, the following scenarios:

- Change in Supervised Living Arrangement (including physical location change, change in persons residing in the home, or change to services being provided)
- Young adult begins to receive or stops receiving benefits such as SNAP, SSA payments, child support, or Sunshine CWSP
- Young adult obtains or ceases employment
- Young adult receives lump sum payment such as financial aid, SSA back payment, or tax return
- Young adult becomes a parent or has a child removed from their custody

Best practice is to obtain signatures in person by the young adult, but DocuSign or other electronic signature methods may be utilized. The completed form with signatures shall be uploaded to the FSFN file cabinet utilizing the category of Independent Living with the type of Assessments.

There is no statutorily required allowance nor monthly amount for EFC participants. This should be determined individually for each young adult based on the results of the needs assessment.

ACTION REQUIRED: Please share this memorandum with all case management staff, independent living programs, and other service providers as appropriate who will serve the Extended Foster Care population respectively.

CONTACT INFORMATION: If you have any questions or require additional information, please contact Cal Walton, III, Deputy Director, Office of Child and Family Well-being at 407-241-4712 or cal.walton@myfilfamilies.com.

Cc: Community-Base Care Lead Agency CFO's
Office of CBC/ME Financial Accountability
Child Protection Directors
Chiefs of Licensing



Office of Child and Family Well Youth and Young Adult Services

EFC Needs Assessment Guide 2025

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Needs Assessment Purpose and Overview

Florida Statute, s. 39.6251, F.S. states that a young adult, while in EFC, will live in an independent living environment that offers, at a minimum, life skills instruction, counseling, educational support, employment preparation and placement, and development of support networks. The determination of the type and duration of services shall be based on the young adult's assessed needs, interests, and input and must be consistent with the goals set in the young adult's case plan.

To successfully determine the support needed to transition towards independence while in Extended Foster Care, an assessment of the young adult's needs should be completed. The young adult is expected to contribute to their living expenses to demonstrate self-sufficiency and financial management skills. As they become more independent, the needs assessment should be updated to determine what their contribution to living expenses should be. The FSFN Reference Payment Guide indicates that an **allowance is a payment amount made directly to an EFC young adult to manage for discretionary expenses, such as savings, cable television, entertainment, and leisure transportation. The amount of the allowance is based on a needs assessment.** The young adult's basic needs should be met and then the allowance amount determined will be for discretionary expenses.

The purpose of a needs assessment is to determine the level of support provided to the young adult specifically as it relates to financial support based on their needs and strengths. Discussions surrounding income and assets, expenses, housing and basic needs should occur on a regular basis with the young adult but may not require a monthly update to the needs assessment. A new needs assessment should be completed at minimum every 6 months or whenever there is a change in circumstance including, but not limited to, the following scenarios:

- Change in Supervised Living Arrangement (including physical location change, change in persons residing in the home, or change to services being provided)
- Young adult begins to receive or stops receiving benefits such as SNAP, SSA payments, child support, or Sunshine CWSP
- Young adult obtains or ceases employment
- Young adult receives lump sum payment such as financial aid, SSA back payment, or tax return
- Young adult becomes a parent or has a child removed from their custody

The permanency goal for Extended Foster Care is to transition from licensed care to independent living. The determination of the type and duration of services shall be based on the young adult's assessed needs, interests, and input and must be consistent with the goals set in the young adult's case plan, 39.6251(4)(b)2, Florida Statutes. Once it is determined that all needs are being met by the young adult or other sustainable means to include financial and service related, the young adult's case plan should be reassessed to determine if the goal of transitioning to independence has been achieved. For a young adult to achieve their permanency goal they should successfully complete their case plan outcomes. In addition, they should be able to provide for their own financial needs through earned and/or unearned income, be competent in securing Medicaid or other insurance, understand their medical and mental health needs and be able to meet them, and have secure housing appropriate to their level of functioning. For a young adult whose disability limits or prohibits them from understanding these functions, to achieve permanency they should have the appropriate permanent supportive adults capable of making decisions in their life including, but not limited to, a guardian appointed through probate court, representative payee, APD waiver support coordinator, etc. In addition, there should be permanent services and

supports in place for them such as APD, Vocational Rehabilitation, Social Security Disability Income, Medicaid, etc.

Needs Assessment Development

The Florida Department of Children and Families (“Department”) collaborated with the Independent Living Services Advisory Council (“ILSAC” or “the Council”) as well as youth voice advocacy groups and current Independent Living Specialists to create the corresponding Needs Assessment. This assessment will be attached to the Shared Living Plan to fully document the support provided to the young adult and the placement. The intent of the Shared Living Plan is to ensure that the young adult is provided an appropriate level of supervision, services and supports in their home environment for effective transition from EFC to independent Living, pursuant to section 39.6251, Florida Statutes. Expounding upon the Financial Resources section during creation of the Shared Living Plan by completing a comprehensive needs assessment will ensure all services are addressed as well as incorporating the young adult’s contribution to their self-sufficiency.

This facilitator guide mirrors the structure of the Needs Assessment to detail the factors that should be taken into consideration under each section.

Initial Assessment Questions

Before an accurate needs assessment can be completed, there are a few areas that must be understood in detail. These initial assessment questions allow for a complete understanding of factors relating to room and board, income, and additional expenses that might not be otherwise discussed in the Shared Living Plan. While the actual cost of these expenses will be detailed later in the assessment, up front discussion is important.

The success of the young adult in their qualifying activity should be encouraged and financial needs should not be a barrier. Most expenses will be a one-time cost or fee and documented on this form under non-recurring expenses. Examples of financial supports needed for the young adult to be successful with the qualifying activity are:

- Books
- Computer
- Uniforms (for school or employment)
- Testing fees
- Background checks

Young adults placed in a level 2 or above licensed foster home are required to have food provided to them through the licensed care board rate. Young adults residing in any other type of non-licensed placement (host home, transitional living program, shared housing, etc) may need financial resources to provide for their food. This assistance can include SNAP benefits; the IL Specialist or designated staff working with the young adult should assist with ensuring the appropriate funds are provided to the young adult for food.

Understanding what transportation is available to the young adult for participation in their qualifying activity must be considered when completing the needs assessment. Any transportation beyond what is

needed for participation in the qualifying activity is leisure and can be provided by Sunshine CWSP if enrolled or by the young adult.

If the young adult is pregnant and/or parenting, expenses relating to childcare should be taken into consideration during completion of the needs assessment. Discuss the age of the child(ren) to accurately begin to assess what their needs might be. The young adult should apply for and explore all resources available. These may include:

- Early Learning Coalition (ELC) can provide low-cost childcare for young adults with dependents. [Family Portal: Login \(floridaearlylearning.com\)](http://floridaearlylearning.com)
- Women, Infants, and Children (WIC) can provide healthy approved foods, nutrition education and counseling, breastfeeding support, and referrals for community services for women, infants, and children under age 6.
- Child Support Payments can include receiving payments or being ordered to pay if the child is not in their custody.

Discussion on the young adult's social security benefits and how they are being utilized to provide for the young adult's needs should be documented in the initial assessment questions as well as incorporated into the detailed financial section.

Income and Assets

The income and assets section is broken into three tables. The earned and unearned income sections should consider recurring monthly payments. Lump sum payments such as financial aid can be broken into a monthly amount for budgeting purposes if there is not a plan for spending wisely or saving the funds for another purpose. The assets section should document the amounts the young adults have in the respective accounts. The third section is to document the plan for spending or saving lump sum payments and will detail if that amount is broken down into the monthly income budget.

Earned Income

This section focuses on ensuring young adults have a reliable income to achieve self-sufficiency as well as the financial skills to manage their income and expenses. The young adult is expected to contribute to their living expenses utilizing their earned income. As the income increases, the contribution to their living expenses should also increase resulting in an update to the SLP with needs assessment being incorporated. Conversely, as there are changes to the income or qualifying activity, the needs assessment should be reassessed to determine if changes are needed to agency contributions.

Earned income includes all the following types of income: wages, tips, and any other employee pay. Employee pay should be considered as wages for purposes of this needs assessment even if it is non-taxed income. Income should also be taken into consideration and documented in CCWIS even if employment is not the young adult's primary qualifying activity.

Unearned Income

Unearned income is money received by the young adult from sources other than employment including funds from government assistance programs, dividends/interest, and financial aid/scholarships. Each line item from the unearned income section is detailed below. All efforts should be made to ensure the young adult is maximizing assistance from these areas.

Supplemental Nutrition Assistance Program (SNAP) benefits: SNAP can provide monthly assistance for food if approved after turning 18. The young adult must renew every 6 months. The monthly amount received depends on income, the number of dependents, etc. To be eligible for assistance, young adults must prepare food separately from other household members. The young adult's Independent Living status does not automatically establish eligibility for SNAP. If there are questions concerning an application denial or reduction of benefits, the young adult (ages 18-26) can connect with the Office of Continuing Care.

Application available at [MyACCESS: Same Name, New Portal | Florida DCF](#)

TANF: Temporary Cash Assistance helps with cash to pay for rent, housing, utilities for families with at least one child in the home.

Application available at [MyACCESS: Same Name, New Portal | Florida DCF](#)

Women, Infants, and Children (WIC): provides healthy approved foods, nutrition education and counseling, breastfeeding support, and referrals for community services for women, infants, and children under age 6. To apply for WIC, call 1-800-342-3556 and ask for the phone number of your local WIC office. The local WIC office will give you an appointment to see if you are eligible for WIC. On your visit, your household income and the medical/nutrition status of each applicant will be reviewed.

More information available at [Women, Infants, and Children \(WIC\) | Florida Department of Health](#)

SSI/SSDI Payments: Social Security Income (SSI) provides monthly payments to people with disabilities who have little or no income or resources. Social Security Disability Insurance (SSDI) provides monthly payments to people who have a disability that stops or limits their ability to work (must have work history prior to disability).

Application available at [Apply for Social Security Benefits | SSA](#)

Dividends or Interest: Dividends are typically quarterly payments made by an investment company to the shareholder out of the profits. Interest is cash earned from bank savings accounts or bonds. These payments should be included as income for the young adult if they are consistent and recurring.

Trust/Inheritance: Funds received as the beneficiary of a will or estate. This should be included as monthly income if the payments are recurring; if not, document in the lump sum payment section and assess use or savings of funds.

Community Contributions: Any ongoing contributions by an agency or organization towards the young adult's living expenses. One-time contributions should be included in the lump sum payment section. For example, a contribution by an agency to pay for the electricity deposit.

Gifts (recurring/monthly): Any recurring gifts received monthly.

Financial Aid Award: If there are no major plans for savings or making a lump sum contribution towards a monthly payment with the financial aid award, it can be split up into an average monthly amount to consider for the young adult's income. If the young adult has a plan to spend or save the funds appropriately, do not include here.

Scholarship Award: If there are no major plans for savings or making a lump sum contribution towards a monthly payment with the scholarship award, it can be split up into an average monthly amount to consider for the young adult's income. If the young adult has a plan to spend or save the funds appropriately, do not include here.

Assets

Assets should be documented and taken into consideration when completing the needs assessment. This can be used both as a discussion point for teaching the importance of savings while also knowing when to utilize the savings for expenses.

Lump Sum Payments

Young adults are likely to receive one or more lump sum payments throughout the year. For example, financial aid awards, tax returns, or an SSI/SSDI back payment. It is important to complete a current needs assessment when these are received to teach how to develop a plan to spend and/or save these amounts. If the young adult is receiving the full Pell Grant, they may elect to use the lump sum to pay towards rent for the semester or purchase a car.

Non-recurring Expenses

This chart should detail expenses that have been paid on behalf of or by the young adult that are one-time charges. For example, housing or rental deposits, utility deposits, education related expenses (detailed below), vehicles, and other one-time payments. This log should be kept up to date each time a new needs assessment is completed meaning new expenses will be added if they were paid in the interim since the last needs assessment was completed. Detailed discussion on what non-recurring expenses should be considered follows. The following expenses are not required to be paid by the CBC but are allowable expenses when taken into consideration in conjunction with the rest of the needs assessment.

Education

This section covers the strategy for supporting the young adult's educational plan, which includes the need for additional resources, as well as any identified barriers to obtaining educational goals. This section identifies any additional fees and supports needed for the young adult while they are in a secondary, post-secondary, technical, or vocational setting. Most education related expenses are likely to be a one-time expense rather than recurring payments. If eligible for the Sunshine CWSP, the young adult should utilize the tutoring and education voucher as applicable to assist with education related expenses.

High School Students

- Laptop/Printer/Internet
- Senior Fees (Graduation, Grad Bash, Senior Pinning, Yearbook, Senior Breakfast, Senior Week Homecoming, Prom)
- School Supplies/Essentials (Backpack, Computer, Paper, Pens, Etc.)
- School Related Fees for clubs/ labs etc.
- College Application Fees
- GED Testing Fees
- Extra-Curricular Fees

Post-Secondary Students

- Labs
- Textbooks
- Computers
- School Supplies
- Meal Plans (*discuss under basic needs*)
- Testing Fees related to vocational/technical curriculum completion

Housing

One-time expenses that may apply to housing include but are not limited to:

- Rental deposits
- Advance rent payments
- Utility deposits
- Furniture or other needs to establish housing

Cell Phone

If the young adult has Medicaid or receives SNAP, they may be eligible for a government issued cell phone through Assurance Wireless. Basic cell service and phone should be considered a need for the young adult to maintain connection for emergencies, their qualifying activity, and with any assigned child welfare professionals. Any phone or service plan above and beyond the ability to complete phone calls and texts messages should be considered a discretionary expense and the young adult would be responsible to use their own funds.

- [Lifeline Service in the State of Florida \(assurancewireless.com\)](http://assurancewireless.com)
- Reasons to choose Assurance Wireless:
- FREE monthly calls, text, and data
- FREE Android™ Smartphone (new customers only)
- \$0 cell phone bill
- No credit checks. No annual contracts. No activation fees.

General Discussion

This section should be utilized as a planning area for future possible expenses, as well as discussion on how the young adult is saving to contribute towards non-recurring expenses that will move them towards achieving their case plan outcomes.

General discussion surrounding the young adult's current educational status as well as future goals should include the following considerations:

- Has the young adult met with their guidance counselor, if enrolled in a high school, to determine if there are any resources available for standardized testing fees, graduation fees, post-secondary education application fees, etc.?
- Is the young adult aware of the Department of Children and Families Tuition Waiver, what post-secondary institution accepts the waiver, and how to access the waiver?
- Is the young adult familiar with private and public student loans?

- Is the young adult familiar with for-profit institutions, and if applicable the possibility of taking on student loan debt?
- Is the young adult familiar with [Free Application for Federal Student Aid](#) for post-secondary education, and if applicable aided on the application completion?
- Is the young adult familiar with campus-based support program, [Positive Pathways](#) for youth and young adults utilizing the tuition waiver?

General discussion surrounding current and future plans for housing should include the following considerations:

- What are the future housing goals for the young adult?
- Is the young adult able to pay for or saving for deposits for individual housing?
- Is the young adult able to pay for or saving for utility deposits for future housing?
- Have Foster Youth to Independence (FYI) or Family Unification Project (FUP) housing vouchers been explored for the young adult?
- Have extremely low-income (ELI) apartments been explored as a housing option if available in your area?
- How does the young adult plan to utilize the \$500 Transition Grant provided by Sunshine CWSP, if eligible?

Housing and Basic Needs

To determine the amount of financial support provided to an EFC out of home placement, the young adult's level of supervision must be assessed through a Supervised Living Arrangement Assessment.

Housing

When determining allowable housing costs consider the young adult's level of supervision needed, the supervised living arrangement, and the young adult's ability to contribute to the amount. While there is no standard housing amount, it should be based on fair market rent amount and the young adult's needs should be considered as well. Costs over and above what is the assessed need for the young adult can be contributed by the young adult. Room and board to a provider may provide for some other basic needs in addition to housing. The following should be considered when assessing this expense:

- MOU or contracted rate agreement with provider?
- What are other household members contributing towards rent and housing expenses? The Department and CBC Lead Agencies are not responsible for nor required to pay for housing expenses that should be shared with other household members.
- Are there any financial supports for housing that can be explored? (Ex FYI, FUP, ELI)
- Fair market rent amounts [Fair Market Rents \(40th PERCENTILE RENTS\) | HUD USER](#)

Utilities

Utility payments should be considered in a needs assessment as a monthly expense to include electricity/gas, water, trash, and internet. When the young adult is ready to start contributing to housing expenses, utility payments are an easy place to start as they can incorporate one or two at a time. Internet is not a required expense to be covered by the CBC but should be considered if it is required for the qualifying activity. [Get help paying for phone and internet service | USAGov](#)

Home Maintenance

If not included in housing expenses, expectations should be addressed for who will provide for home maintenance expenses.

Food/Groceries

The young adult should apply for SNAP benefits. The monthly amount received should be considered when determining if any additional financial support needs to be provided. Meal plans provided at dorms should also be considered for expenses. If eligible for the Sunshine CWSP, the young adult should utilize the annual \$50 food gift card benefit for food insecurity.

Clothing

Clothing above and beyond uniform allowance or purchases for school or employment should be considered. There is no standard amount for clothing allowance for a young adult.

Household Supplies

For young adults residing with a caregiver or program, household supplies are likely to be considered in room and board amount. Detail specifics in general discussion section. Anything over the basics provided should be considered as the young adult's expense. For those living individually and required to provide their own items, essential household supplies include, but are not limited to:

- Toilet paper
- Paper towels
- Cleaning supplies
- Laundry detergent

Hygiene Essentials

Young adults on the Sunshine Child Welfare Specialty Plan should utilize the \$50 monthly over the counter benefit to provide coverage for cold, cough, allergy, vitamins, supplements, ophthalmic/otic preparations, pain relievers, gastrointestinal products, first aid care, hygiene products, insect repellent, oral hygiene products and skin care.

For those not eligible for the benefit, the following should be considered as basic hygiene essentials when determining a monthly amount:

- Grooming and hair care products. Type and frequency of haircuts and hair maintenance should be considered as it relates to the young adult's specific hair care needs. Also, additional hair care products may be required.
- Feminine products
- Hygiene products such as body wash/soap, washcloths/loofah, facial cleanser, lotions, razors, shaving gel/cream, antiperspirants/deodorant
- Oral hygiene products such as toothbrush, toothpaste, mouthwash, floss

Cell Service

Efforts should be made to utilize the SNAP or Sunshine CWSP cell phone and service benefit. More information here: [Lifeline Service in the State of Florida \(assurancewireless.com\)](http://assurancewireless.com). If the young adult is not eligible for either of these services, basic cell service should be considered a need. Any service over the ability to communicate with child welfare professionals, parties of the court, school, employment, or other providers should be considered discretionary and covered by the young adult.

Bus Pass/Transportation Expenses

Transportation should not be a barrier for participation in a qualifying activity. Transportation should be secured for the young adult whether through public transportation (monthly bus pass), ride share options (Uber, Lyft, etc), or their own vehicle. If the young adult has their own vehicle, they should be engaged with Keys to Independence to assist with insurance costs. Expenses for personal vehicles should be considered discretionary and the responsibility of the young adult; however, these are allowable expenses should it be determined a need. Young adults enrolled in the Sunshine CWSP should utilize the Transportation Assistance available through the plan which is unlimited free round trips for physical/behavioral health related appointments and 3 round trips each month for social activities and places like work, post-secondary school, grocery shopping, and more.

Allowable transportation related expenses and considerations include, but are not limited to:

- Bus passes/public transportation
 - Is public transportation accessible for the young adult?
 - Cost of monthly pass (are student passes available?)
 - Is there any time that public transportation is not available?
- Ubers/Rideshares
 - Does young adult have a credit or debit card to set up account?
 - What is the average cost of trip to qualifying activity? Monthly cost?
 - Is there any time that ride share would be unavailable?
- Vehicle expenses
 - Monthly car payment
 - Average monthly amount of gas purchases
 - Monthly insurance cost
 - Vehicle maintenance
 - License and registration fees
 - Tolls

Laundry

The young adult should have access to laundry services if not included in room and board. Examples of providing this basic need for the young adult can include:

- Washer/dryer rental fees through apartment lease
- Funds for laundry mat

Childcare Expenses

If the young adult is the parent of a child who is living in the same approved supervised living arrangement in which payments are being made for room and board, the payments can also include such amounts necessary to cover the cost of the items with respect to the child. The needs of the young adult's child should also be assessed to determine the cost of food, clothing, shelter, daily supervision, school supplies, and a child's personal incidentals. Allowable expenses with payment considerations are listed below. Expenses may need to be detailed on a separate page with the total listed on the monthly budget section of the needs assessment.

- Childcare: A payment made to a licensed childcare provider on behalf of an EFC young adult for the care of his/her child(ren) while the young adult is participating in his/her qualifying activity

- Baby care including skin care, hair care, protectant, and teething/gum improvement. Some of these expenses may be allowable under the young adult's Sunshine Child Welfare Specialist Plan over the counter monthly benefit.
- Formula: young adults should apply for WIC to assist with this cost.
- Baby bottles, pacifiers, spit rags, bibs
- Items for breastfeeding (pump, milk storage bags, breast pads, breast cream, breast feeding bra's, lactation bars, breast feeding pillow). Some of these expenses may be allowable under the young adult's Sunshine Child Welfare Specialist Plan over the counter monthly benefit as well as provided by WIC.
- Baby food
- Clothes
- Age-appropriate bedding (crib, bassinet, toddler's bed)
- Car Seat: some fire departments or Children's Advocacy Centers may have car seats available to those in need.
- Feeding Chair
- Medication

General Discussion

This section should be utilized as a planning area for future possible expenses, as well as discussion on how the young adult will begin to contribute towards housing and basic needs that will move them towards achieving self-sufficiency. This information should be an ongoing conversation and a part of their My Pathways to Success Plan and case plan.

Discretionary Expenses

The intent of an allowance amount paid directly the young adult is to enable the young adult to experience managing money and provide for their own discretionary expenses. There is no standard allowance amount; nor is it statutorily required to be provided. If provided, the allowance amount should be used to budget the discretionary expenses after the housing and basic needs are met.

- Entertainment
- Restaurant/Food Delivery
- Savings
- Cable Service
- Internet Service
- Enhanced Cell Service/Phone
- Car Payment
- Car Insurance
- Gas
- Leisure Transportation
- Hair/Nails/Make-up (outside of essential grooming)
- Credit Card
- Pet Expenses
- Subscription Services
- Non-Medicaid Healthcare: Braces, wisdom tooth removal, enhanced glasses

Assessment and Allowance

This section is intended to summarize the amount of the young adult's housing and basic needs expenses but also what they are contributing to their monthly living expenses. The percentage they contribute can be used as a guide to gradually increase the amount as they work towards achieving financial self-sufficiency.

If there is a need that the CBC lead agency is not providing for, that should be discussed here as to why or what is being done to eliminate the barrier to the need being provided.

The monthly allowance amount should be documented in this section with justification for how the amount was determined based on the young adult's discretionary expenses and income. The monthly payment to the young adult should be detailed at the end noting if they are receiving funds per month for needs which they will be responsible for paying in addition to their allowance.

The young adult and IL Specialist/Case Manager are expected to sign as an understanding of the completed needs assessment. It is imperative that the young adult understands what funds are being expended for housing and basic needs, what is considered their fiscal responsibility, and that they understand any monthly payment received for how it should be utilized. If the young adult is to develop financial management skills and transition to self-sufficiency, these discussions and understanding are critical to their learning and success.



Financial Resources and Needs Assessment

The purpose of this assessment is to determine the level of support provided to the young adult specifically as it relates to financial support based on their needs and strengths as an addendum to the Shared Living Plan. This assessment should be updated whenever there is any change in circumstance to determine if there are any changes needed to the financial support provided by the agency.

The young adult is expected to contribute to their living expenses to demonstrate self-sufficiency and financial management skills. As they become more independent, this assessment should be updated to determine what their contribution to living expenses should be. The allowance amount should be determined after the income and basic needs are assessed, then based on discretionary spending.

The determination of the type and duration of services shall be based on the young adult’s assessed needs, interests, and input and must be consistent with the goals set in the young adult’s case plan, 39.6251(4)(b)2, Florida Statutes. Once it is determined that all needs are being met by the young adult or other sustainable means to include financial and service related, the young adult’s case plan should be reassessed to determine if the goal of transitioning to independence has been achieved.

Initial Assessment Questions		
What is the young adult’s qualifying activity and where (school, employer, etc)?	<input type="checkbox"/> Secondary Education/GED: Click or tap here to enter text. <input type="checkbox"/> Post-Secondary Education: Click or tap here to enter text. <input type="checkbox"/> Employed at least 80 hours/month: Click or tap here to enter text. <input type="checkbox"/> Program to eliminate barriers to employment: Click or tap here to enter text. <input type="checkbox"/> Less than full-time enrollment due to disability: Click or tap here to enter text.	
What financial supports are needed for the young adult to be successful with the qualifying activity?	Click or tap here to enter text.	
Does the young adult reside in a placement where food is provided through the room and board rate? <input type="checkbox"/> Yes <input type="checkbox"/> No	If no, explain? Click or tap here to enter text.	
Does the young adult have reliable transportation to their qualifying activity? <input type="checkbox"/> Yes <input type="checkbox"/> No	What is the plan for transportation (including bus pass as option)? Click or tap here to enter text.	
Does the young adult receive SSI/SSA payments? <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, who is the rep payee? Click or tap here to enter text.	How is this payment being used towards the young adult’s room and board (housing and food)? Click or tap here to enter text.
Is the young adult pregnant/expecting or parenting? <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, what are the age(s) of the child(ren)? Click or tap here to enter text. If yes, what resources is the young adult receiving to assist with care of their child (ex: WIC, ELC, child support, etc.)? Click or tap here to enter text.	

Income and Assets

Monthly Earned Income		Monthly Unearned Income	
Source	Amount	Source	Amount
Wages (monthly take-home amount)		SNAP Benefits	
Tips (average monthly amount)		TANF	
Employment Incentives/Bonuses		WIC	
Tax Return		SSI/SSA Benefit	
Other		Dividends or Interest	
		Trust/Inheritance	
		Community Contributions	
		Gifts (received monthly)	
		Financial Aid/Scholarship Award (monthly amount)	
		Other	
Total	\$ 0.00	Total	\$ 0.00

Assets	Estimated Value
Checking Account	
Savings Account	
Vehicle	
Cash	
Cashapp, Venmo, Paypal	
Cryptocurrency	
Property	
Master Trust Balance <input type="radio"/> dispersed to young adult or <input type="radio"/> rep payee	
Other	
Total	\$ 0.00

Lump Sum Payment	Plan for spending or savings	Are funds included in monthly income assessment above?
Financial Aid Award		<input type="checkbox"/> Yes <input type="checkbox"/> No
Scholarship Amount		<input type="checkbox"/> Yes <input type="checkbox"/> No
Tax Return		<input type="checkbox"/> Yes <input type="checkbox"/> No
Inheritance		<input type="checkbox"/> Yes <input type="checkbox"/> No
Employee Bonus		<input type="checkbox"/> Yes <input type="checkbox"/> No
SSI/SSDI Back Payment		<input type="checkbox"/> Yes <input type="checkbox"/> No
Master Trust Balance		<input type="checkbox"/> Yes <input type="checkbox"/> No
Community Contributions		<input type="checkbox"/> Yes <input type="checkbox"/> No
Other		<input type="checkbox"/> Yes <input type="checkbox"/> No

Non-recurring Expenses

At the time of completion, what non-recurring or one-time expenses are anticipated or historically have been provided for the young adult. For example, housing deposit or advance rent payments, utility deposits, laptop, cell phone, etc.

Non-Recurring Expenses			
Expense	Date	Who Paid?	Amount
Total			\$ 0.00
General Discussion on non-recurring expenses:			
Click or tap here to enter text.			

Housing and Basic Needs

When determining allowable housing costs consider the young adult’s level of supervision needed, the supervised living arrangement, fair market rent values, and the young adult’s ability to contribute to the amount. Costs over and above what is the assessed need for the young adult can be contributed by the young adult. Room and board to a provider may provide for some other basic needs in addition to housing and should be documented below. Any payment noted to be included in room and board should be listed in Section D: Financial Resources of the Shared Living Plan.

Basic Needs/Incidentals					
	Monthly Amount	Amount Included in R&B?	Agency or Other Contribution	Young Adult’s Contribution	Who is payment made to?
Housing/Room & Board					
Electricity/Gas					
Water					
Trash					
Internet					
Home Maintenance					
Food/Groceries *Include up to \$292 in SNAP					
Clothing					
Household Supplies					
Hygiene Essentials *include \$50/month OTC from Sunshine					
Cell Service					
Bus Pass					
Transportation Expenses					
Laundry					
Childcare Expenses					
Other:					
Other:					
Totals	\$ 0.00		\$ 0.00	\$ 0.00	
General Discussion on Basic Needs and Incidentals:					
Click or tap here to enter text.					

Discretionary Expenses

Any payment noted to be included in room and board should be listed in Section D: Financial Resources of the Shared Living Plan.

Discretionary Expenses					
	Monthly Amount	Amount Included in R&B?	Agency or Other Contribution	Young Adult's Contribution	Who is payment made to?
Entertainment					
Restaurant/Food Delivery					
Savings					
Cable Service					
Internet Service					
Enhanced Cell Service/Phone					
Car Payment					
Car Insurance					
Gas					
Leisure Transportation *3 trips/month provided by Sunshine for leisure trips (30 mile trip)					
Hair/Nails/Etc.					
Credit Card					
Pet Expenses					
Subscription Services					
Non-Medicaid Healthcare					
Other:					
Totals	\$ 0.00		\$ 0.00	\$ 0.00	
General Discussion on Discretionary Expenses:					
Click or tap here to enter text.					

Assessment	
The young adult's total expenses for basic needs per month are:	
The young adult is contributing the following to their basic needs per month:	
The young adult is contributing the following percentage of their monthly basic needs: (calculate percentage by dividing what they are contributing by total cost of expenses and multiply answer by 100)	
What is the plan to move the young adult towards self-sufficiency? This should include discussion on increasing contributions towards living expenses as able.	Click or tap here to enter text.
What level of supervision, life skill development, crisis intervention is included in housing cost?	Click or tap here to enter text.
Based on this assessment, have all the needs of the young adult been provided for successful participation in EFC? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, what information above supports this decision? If no, what will the lead agency need to do to ensure the young adult has all assessed needs provided?	Click or tap here to enter text.
Based on this assessment, the young adult's income, and the basic need expenses, what is the monthly allowance amount?	Click or tap here to enter text.
Provide justification for this amount and how it is determined to assist the young adult in understanding spending and savings while in EFC.	Click or tap here to enter text.

Allowanceⁱ

Detailed Monthly Payment to Young Adult	
Payment provided for	Amount
Allowance	
Total	\$ 0.00

By signing below, I acknowledge an understanding that the monthly funds I receive from my lead agency are for the expenses listed above. I understand that allowance is a payment amount made directly to me, an EFC young adult, to manage for discretionary expenses (not required to be provided), such as savings, cable television, entertainment, leisure transportation, etc. The amount of the allowance is based on this needs assessment. Changes to the monthly allowance amount requires an update to this assessment. Providing an allowance to a young adult is discretionary and is not statutorily required. Allowance amount determination is not an appealable decision.

Signatures

Young Adult

IL Specialist/EFC Case Manager

ⁱ Please note that the allowance amount must be paid in a separate check or indicate the amount in a line item and should also be listed on Section D: Financial Resources of the Shared Living Plan.