



# The Florida Senate

## Local Funding Initiative Request

### Fiscal Year 2025-2026

LFIR # 2976

1. Project Title

2. Senate Sponsor

3. Date of Request

4. Project/Program Description

Take Stock aims to boost postsecondary retention, persistence, and completion for its students in poverty through academic and career coaching and peer mentoring support, and targeted degree attainment and CTE certification services through its Take Stock in College and Career program. Take Stock aims to move its completion rates from 73% to 95% and ensure its first-generation students achieve degree attainment or certification by providing 7,000+ students attending a Florida college or university with continued support services to help them succeed in college, career, and life. Students benefit from text nudging and wrap-around connections to mental health, food, housing, and transportation services. Take Stock has a proven track record of assisting low-income, at-risk students in achieving their educational dreams. A higher postsecondary completion rate and increased access to competitive career-ladder jobs mean a more robust economy and a greater return on investment for Florida.

5. State Agency to receive requested funds

State Agency contacted?  Yes

6. Amount of the Nonrecurring Request for Fiscal Year 2025-2026

Type of Funding	Amount
Operating	850,000
Fixed Capital Outlay	0
<b>Total State Funds Requested</b>	<b>850,000</b>

7. Total Project Cost for Fiscal Year 2025-2026 (including matching funds available for this project)

Type of Funding	Amount	Percentage
Total State Funds Requested (from question #6)	850,000	70%
<b>Matching Funds</b>		
Federal	0	0%
State (excluding the amount of this request)	0	0%
Local	0	0%
Other	368,650	30%
<b>Total Project Costs for Fiscal Year 2025-2026</b>	<b>1,218,650</b>	<b>100%</b>

8. Has this project previously received state funding?  Yes

If yes, provide the most recent instance:

Fiscal Year (yyyy-yy)	Amount		Specific Appropriation #	Vetoed
	Recurring	Nonrecurring		
2024-25	0	850,000	70	No

9. Is future-year funding likely to be requested?  Yes

a. If yes, indicate nonrecurring amount per year.

b. Describe the source of funding that can be used in lieu of state funding.



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## Complete questions 10 and 11 for Fixed Capital Outlay Projects

### 10. Status of Construction

a. What is the current phase of the project?

- Planning    
  Design    
  Construction    
  N/A

b. Is the project "shovel ready" (i.e permitted)?

c. What is the estimated start date of construction?

d. What is the estimated completion date of construction?

e. What funding stream will be used for ongoing operations and maintenance of the project?

11. List the owners of the facility to receive, directly or indirectly, any fixed capital outlay funding. Include the relationship between the owners of the facility and the entity.

### 12. Details on how the requested state funds will be expended

Spending Category	Description	Amount
<b>Administrative Costs:</b>		
Executive Director/Project Head Salary and Benefits	Project Director oversees the program and ensures effectiveness throughout the state, including training and managing staff and communicating with Take Stock college and university students and our postsecondary partners throughout Florida.	85,000
Other Salary and Benefits		0
Expense/Equipment/Travel/Supplies/Other		0
Consultants/Contracted Services/Study		0
<b>Operational Costs</b>		
Salary and Benefits	Postsecondary Resource Specialists provide college completion coaching support to students attending Florida's public colleges and universities and ensure the 7,000+ Take Stock students stay on track for degree attainment or career certification. Student Ambassadors provide first-gen knowledge, experience and peer support. Communications and IT/Database specialists support program services.	455,000
Expense/Equipment/Travel/Supplies/Other	Technology licenses, Artificial Intelligence chatbot texting platform that enables timely student "nudges," interactive reminders, and encouragements. National Student Clearinghouse; database support and enhancements to track student performance; Virtual communications tools to connect with students; and an online community platform to effectively update, engage, and communicate with students.	215,000
Consultants/Contracted Services/Study	Financial Aid and FAFSA consultant to maximize students' access to financial aid/PELL. Mental health and wellness experts and consultants to support students on their pathway to degree attainment. Other postsecondary resilience and persistence experts as needed.	95,000



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<b>Fixed Capital Construction/Major Renovation:</b>		
Construction/Renovation/Land/ Planning Engineering		0
<b>Total State Funds Requested (must equal total from question #6)</b>		<b>850,000</b>

### 13. Program Performance

**a. What specific purpose or goal will be achieved by the funds requested?**

The goal is to increase the postsecondary graduation rate from 73% to 95% for 7,000+ Take Stock student scholars attending a Florida public college or university through the Take Stock in College and Career program. The program has increased its postsecondary graduation rate by six points, from 67% to 73%, since the program began in 2018. Low-income, at-risk students join the Take Stock program as early as 6th grade and continue through the College and Career program until they reach postsecondary degree attainment or career certification. Take Stock in College and Career student scholars are traditionally first-generation, with 100% being from low-income families, and over 70% being students of color. By graduating students who are career-ready and prepared to contribute to Florida's workforce and economy, the Take Stock in College and Career program is helping scholars fulfill the state of Florida's full investment in their education from early learning to postsecondary completion.

**b. What activities and services will be provided to meet the intended purpose of these funds?**

Each Take Stock in College and Career program student scholar benefits from academic and career coaching, peer mentoring, AI chatbot text nudging, as well as wrap-around support services, activities, and connections related to mental health support, food, housing and transportation security, financial aid, and scholarship support. Program services are supported by the engage, track, connect, coach, complete model, and PERSIST curriculum, as well as connecting Take Stock collegiate scholars to preexisting on-campus resources, not to duplicate services. Upon entering the program, the student's focus shifts from readiness and access to postsecondary retention, persistence, and completion. The Take Stock in College and Career program benefits from the trusted relationships established with its students as early as middle school through high school and into college to help connect them to the resources needed to learn, grow, and succeed.

**c. What direct services will be provided to citizens by the appropriation project?**

Take Stock in College and Career program services will include academic and career coaching, peer mentoring, AI Chatbot text nudging, financial aid, and scholarship guidance for 7,000+ Take Stock collegiate scholars attending Florida's public colleges and universities utilizing the persistence and retention program model of engage, track, connect, coach, and complete. The program will provide connections to mental health, food, housing, and transportation support services to assist low-income, at-risk, and first-generation students in navigating their postsecondary education to achieve degree attainment or career certification.

**d. Who is the target population served by this project? How many individuals are expected to be served?**

The Take Stock in College and Career program provides postsecondary support services to the 7,000+ Take Stock student scholars attending Florida's public colleges and universities. Take Stock in College and Career student scholars are 100% low-income, with over 70% being students of color and are traditionally first-generation college students. Upon high school graduation, the Take Stock in Children program graduates earn their Florida Prepaid College Foundation Project STARS Scholarship and are automatically enrolled in the Take Stock in College and Career program. The Take Stock College and Career program works to ensure low-income students receive postsecondary support services, achieve postsecondary degree attainment, and maximize the state of Florida's return on investment for each student's education.

**e. What is the expected benefit or outcome of this project? What is the methodology by which this outcome will be measured?**



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The expected benefit is to increase the postsecondary graduation rate from 73% to 95% for 7,000+ Take Stock in College and Career program student scholars attending a Florida public college or university. This program has increased its postsecondary graduation rate by six points, from 67% to 73%, since the program began in 2018. This program measures its outcomes utilizing National Student Clearinghouse data and any collected college, university, and Florida Prepaid data. Educational and economic indicators will measure the method for increasing and improving the program's impact on the state's economy. The wage premium between an earner with a high school education and a bachelor's degree is +61.8% among Florida earners. Average worker annual earnings increase from \$34,769 for those with a high school diploma to \$56,243 for those with a four-year degree in Florida. An independent evaluation will also be conducted utilizing research-based indicators assessing postsecondary completion.

**f. What are the suggested penalties that the contracting agency may consider in addition to its standard penalties for failing to meet deliverables or performance measures provided for in the contract?**

Not meeting individual deliverables will have financial consequences.

**14. Is this project related to mitigation, response, or recovery from a natural disaster?**  No

**a. If Yes, what phase best describes the project?**

- Mitigation (reducing or eliminating potential loss of life or property)
- Response (addressing the immediate and short-term effects of a natural disaster)
- Recovery (assisting communities return to normal operations, including rebuilding damaged infrastructure)

**b. Name of the natural disaster (or Executive Order # for events not under a federal declaration):**

**15. Has the entity applied for or received federal assistance for this project?**

- Yes, Applied
- Yes, Received
- No
- No, but intends to apply

**a. If yes, provide the FEMA project worksheet ID#:**

**b. Provide the total project cost listed on the FEMA project worksheet:**

**16. Has the entity applied for or received state assistance for this project (other than this request)?**

- Yes, Applied
- Yes, Received
- No
- No, but intends to apply

**a. If yes, specify the program and state agency (ex. Local Government Emergency Bridge Loan, Department of Commerce):**



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**17. Requester Contact Information**

a. **First Name**  **Last Name**

b. **Organization**

c. **E-mail Address**

d. **Phone Number**  **Ext.**

**18. Recipient Contact Information**

a. **Organization**

b. **Municipality and County**

c. **Organization Type**

- For Profit Entity
- Non Profit 501(c)(3)
- Non Profit 501(c)(4)
- Local Entity
- University or College
- Other (please specify)

d. **First Name**  **Last Name**

e. **E-mail Address**

f. **Phone Number**  **Ext.**

**19. Lobbyist Contact Information**

a. **Name**

b. **Firm Name**

c. **E-mail Address**

d. **Phone Number**

*The information provided will be posted to the Florida Senate website for public viewing if sponsored by a Senator.*