



CareerSource CLM
2703 NE 14th Street
Ocala, FL 34470

Executive Committee Meeting

REVISED AGENDA

Wednesday, August 27, 2025 – 9:30 a.m.

Join Zoom Meeting: <https://us02web.zoom.us/j/82040052005>

Phone No: 1-646-558-8656 (EST) Meeting ID: 820 4005 2005 Meeting Passcode: 350302

Call to Order		C. Flanagan
Roll Call		C. Schnettler
Approval of Minutes, May 28, 2025	Pages 2 - 4	C. Flanagan

DISCUSSION ITEMS

State Update	Pages 5 - 13	R. Skinner
Workforce Issues Important to Our Community		R. Skinner
Regional Planning - Non-Profit		R. Skinner

PUBLIC COMMENT

ACTION ITEMS

Ocala CEP/MOU Modification	Pages 14 - 15	C. Weaver
Dislocated Worker Fund Transfer	Pages 16 - 18	D. French
Staff Adjustment	Page 19	D. French
2025-2026 Budget	Pages 20 - 24	D. French
Finance User Interface Selection	Pages 25 - 26	D. French
Paycom	Page 27	D. French
Leadership Increases	Page 28	R. Skinner

PROJECT UPDATES

None

MATTERS FROM THE FLOOR

ADJOURNMENT

2025 – 2026 MEETING SCHEDULE							
Performance/ Monitoring	Business and Economic Development	Career Center	Marketing / Outreach	Education and Industry Consortium	Executive	Full Board	
Unless noted otherwise all committee meetings are held at CareerSource CLM, 2703 NE 14 th Street, Ocala, FL 34470							
Tuesday 9:00 am	Wednesday 9:00 am	Thursday 9:30 am	Wednesday 9:00 am	Thursday 9:00 am	Wednesday 9:30 am	Wednesday, 11:30 am	
8/5/2025	8/6/2025	8/7/2025	8/13/2025	8/14/2025	8/27/2025	9/3/2025	CF Levy
11/4/2025	11/5/2025	10/30/2025	11/12/2025	11/13/2025	11/19/2025	12/10/2025	CF Ocala
2/3/2026	2/4/2026	2/5/2026	2/11/2026	2/12/2026	2/25/2026	3/4/2026	CF Lecanto
5/5/2026	5/6/2026	5/7/2026	5/13/2026	5/14/2026	5/27/2026	6/3/2026	CF Ocala

OUR VISION STATEMENT

To be recognized as the number one workforce resource in the state of Florida by providing meaningful and professional customer service that is reflected in the quality of our job candidates and employer services.



**CAREERSOURCE CITRUS LEVY MARION
Executive Committee**

MINUTES

DATE: May 28, 2025
PLACE: 2703 NE 14th Street, Ocala, FL 34470
TIME: 9:30 a.m.

MEMBERS PRESENT

Al Jones
Arno Proctor
Brandon Whiteman
Carl Flanagan
Charles Harris
Fred Morgan
Jeff Chang
Pete Beasley

MEMBERS ABSENT

OTHER ATTENDEES

Rusty Skinner, CSCLM
Dale French, CSCLM

Cira Schnettler, CSCLM
Bob Stermer, Board Attorney

CALL TO ORDER

The meeting was called to order by Carl Flanagan, Chair, at 9:32 a.m.

ROLL CALL

Cira Schnettler called roll and a quorum was declared present.

APPROVAL OF MINUTES

Jeff Chang made a motion to approve the minutes from the February 26, 2025, meeting. Brandon Whiteman seconded the motion. Motion carried.

DISCUSSION ITEMS

State Update

Rusty Skinner provided the following update:

- He recently attended the CSFL meeting where funding updates were provided. There are challenges to meeting all customer needs with funding reductions. Management is developing goals for staff that will meet performance measures while also providing a positive customer experience.

Workforce Issues that are Important to our Community

Carl Flanagan two items:

- He recently spoke with a business owner in Citrus County that utilized our internship program. The owner was extremely satisfied with the service. The owner is a great community advocate for CareerSource CLM.
- He also recently attended a business networking meeting and the members shared that they think highly of CareerSource CLM and the many benefits that are provided.

PUBLIC COMMENT

None

ACTION ITEMS

For each action item Rusty Skinner or Dale French reviewed points of consideration and staff recommendations.

2025-2026 Budget

Al Jones made a motion to approve the preliminary 2025-2026 budget. Charles Harris seconded the motion. Motion carried.

FWDA Dues

Charles Harris made a motion to approve the \$3000 FWDA dues. Pete Beasley seconded the motion. Motion carried.

Workforce Summit Sponsorship

Fred Morgan made a motion to approve the \$5000 sponsorship for the 2025 Summit. Pete Beasley seconded the motion. Motion carried.

Workforce Champion

Brandon Whiteman made a motion to select a staff member as the 2025 CareerSource CLM Champion. Al Jones seconded the motion. Motion carried.

990

Al Jones made a motion to accept the Form 990. Pete Beasley seconded the motion. Motion carried.

Finance User Interface

Fred Morgan made a motion to approve the finance user interface software request for information. Jeff Chang seconded the motion. Motion carried.

Indefinite Quantity Agreements

Charles Harris made a motion to discontinue executing Indefinite Quantity Agreements with training providers. Al Jones seconded the motion. Motion carried.

Benefits Annual Renewal

Al Jones made a motion to approve the presented Annual Benefits plan. Fred Morgan seconded the motion. Motion carried.

Schedule of Operations

Fred Morgan made a motion to approve the 2025-2026 Schedule of Operations. Pete Beasley seconded the motion. Motion carried.

OJT Reimbursement

Charles Harris made a motion to update local policy to include new reimbursement rates at the point in time a waiver is granted. Fred Morgan seconded the motion. Motion carried.

Staff Increases

Al Jones made a motion to approve an increase for all non-contracted hourly and salaried staff at a rate of 3% with the ability to earn an additional 2% based on scoring of annual reviews. Brandon Whiteman seconded the motion. After discussion the motion was amended. Al Jones amended his motion to approve a 3% cost of living increase for all staff, with the opportunity to receive up to an additional 2% increase based on annual staff reviews in the Fall of 2025. All increases will be retroactive to July 1, 2025. Brandon seconded the motion. Motion carried.

ITA Waiver Request

Arno Proctor made a motion to approve the submission of the 2025 ITA allocation waiver request. Pete Beasley seconded the motion. Motion carried.

Joint Audit RFP

Al Jones made a motion to Powell and Jones for auditing services beginning July 1, 2025. Arno Proctor seconded the motion. Motion carried.

PROJECT UPDATES

None

MATTERS FROM THE FLOOR

None

ADJOURNMENT

There being no further business, the meeting was adjourned at 10:52 a.m.

APPROVED:_____

From: Rusty Skinner <rskinner@careersourceclm.com>

Sent: Monday, August 18, 2025 12:46 PM

To: Cira Schnettler <cschnettler@careersourceclm.com>; Clark, Jennifer <Jennifer.Clark@marionfl.org>; Commissioner Carl Zalak <carl.zalak@marioncountyfl.org>; Commissioner Janet Barek <janet.barek@citrusbocc.com>; Commissioner Tim Hodge <district4@levycounty.org>; Kelly Thompson <levybocc@levycounty.org>; Medina, Gennifer <Gennifer.Medina@marionfl.org>; Reese.bilby@citrusbocc.com; Robert Stermer <sv1@atlantic.net>; Rusty Skinner <rskinner@careersourceclm.com>; Yvette Wilson <ywilson.stermerlaw@gmail.com>; Arno Proctor (aproctor@ancorp.com) <aproctor@ancorp.com>; bwhiteman@apex-advisorsfl.com; Carl Flanagan <Carl.flanagan1@gmail.com>; Charles Harris - Central Florida Community Action (cjharris5526@gmail.com) <cjharris5526@gmail.com>; Cory Weaver <cweaver@careersourceclm.com>; Dale French <dfrench@careersourceclm.com>; Fred Morgan <fmtopout72@outlook.com>; Jeff Chang (jeff.chang@lmco.com) <jeff.chang@lmco.com>; Katie Stevens - Stermer Law Group (katie.stermerlaw@gmail.com) <katie.stermerlaw@gmail.com>; Pete Beasley <pete.beasley@rasmussen.edu>; Robert Stermer - Attorney (rstermer.stermerlaw@gmail.com) <rstermer.stermerlaw@gmail.com>

Cc: Dale French <dfrench@careersourceclm.com>; Cory Weaver <cweaver@careersourceclm.com>

Subject: Friday Call from CareerSource Florida

Importance: High

At approximately 12:15 p.m. I received a call and email from the state regarding a Teams meeting at 1:00 p.m. The title of the Teams meeting and email was "Follow-Up- Performance." Neither I nor Dale or Cory had any clear idea of what performance they were following up on. No previous emails or phone calls had addressed the issue. We speculated that this could be regarding our ITA waiver request. We had 2 conversations with a joint team CareerSource Florida/Commerce team led by CareerSource Florida on this matter. The second conversation was because of us providing the attached additional justification for a 35% waiver request. Disregarding the justification, they would only approve a 40% waiver.

The waiver request was not at issue. Citing CareerSource Florida policy #88 (<https://careersourceflorida.com/wp-content/uploads/2025/06/A2-Workforce-Policy-088-Performance-Requirements-for-LWDBs.pdf>) , they notified us that they were sending a notice that required us to develop a Performance Improvement Plan (PIP). The rationale for this was cryptic, citing letter grades. Over the past years since implementation, our letter grade score has declined from an "A-" to a "B". This has been a concern, and we have studied the components of our letter grade score and determined that the largest factor in this decline has been related to the dislocated worker measure. In short, we get few if any Dislocated Workers that are interested in training (the driver of the measure). Virtually all need a job to pay their bills, and we work diligently to assist them. We have been working with staff for the past two years to improve performance. Noting that dislocated workers are most likely reemployment assistance claimants. I requested that they provide us a list of weekly filers so that we could begin outreach. That request was ignored.

While concerning, this seemed hardly so drastic a change that it required requiring a PIP. We waited for more of an explanation and none followed. I asked how many other boards were receiving a call such as this. They said they could not identify the other boards as they had not called them. I restated my request was for a number, not name of the other boards. They again recited they could not divulge specifics, to which I again stated I had not asked for that, only a number. As they were silent, I stated that I felt such a request was well within transparency that they fostered and that it was also probably within the Public Records Act. They asked if we had any other comments and I responded that given the shortness of notice, the lack of specifics and their lack of details that we would hold our comments until we had a chance to review the information.

I should also note that in the last two performance presentations to the Board, no mention of concern had been raised.

The call seemed a scramble at best. I considered it rude and unprofessional.

Should we receive any correspondence I will forward that to you immediately and we will address it timely. If perchance any of you should receive such correspondence, please send it to me so that our response can be prepared.

Thank you

Rusty

Rusty Skinner

Chief Executive Officer

CareerSource Citrus Levy Marion

2703 NE 14th St.

Ocala, FL 34470

Phone: [352-873-7939](tel:352-873-7939), ext. 1204

Mobile: [352-538-5445](tel:352-538-5445)

Fax: [352-873-7910](tel:352-873-7910)

rskinner@careersourceclm.com



Visit us at one of our 3 locations:

[Locations and Office Hours](#)



Performance Metrics, Citrus Levy Marion

Met or Exceeded

**Did not meet
(83.75% met)**

Letter Grade Metrics

- Metric 1: Participants with Increased Earnings
- Metric 3: Employment and Training Outcomes
- Metric 7: Completion-to-Funding Ratio

22-23	23-24	24-25 Q2
93.92	86.16	84.39

[Analytics: Letter Grades: Performance](#)

WIOA Indicator Performance

Actual Performance	2021	2022	2023
Wagner Peyser Employment QT 2	70.5%	70.8%	67.7%
Youth Employment QT 2	81.9%	83%	67.5%
Adult Credential Attainment	81.9%	82.2%	72.3%

[Federal Program Reports - FloridaJobs.org](#)

Met so far for 2024

Met for 2/3 Q for 2024

Met for 1/3 Q for 2024

Bottom Quartile PY 2023

**Not a current or past
performance metric**

Registered Apprenticeship Rate (adult and youth)
Employment QT 2 (adult and youth)
Adult Credential Attainment

Adult: Didn't meet for 23/24, met for 24/25

Youth: Didn't meet for 23/24, met 2/3 for 24/25

Met for 23/24, met 1/3 so far for 24/25

[WIOA Local Workforce Development Board Performance Program Year 2023](#)

Board Performance

CareerSource Citrus Levy Marion Program Year 2024-2025, Quarter 2

Adult

Measure	Performance Goal	Actual Performance	Percentage of Goal Met	Percentage to Goal
Employed 2nd Quarter After Exit	86.00	82.40	<div><div>95.81%</div></div>	4.19%
Employed 4th Quarter After Exit	85.00	78.50	<div><div>92.35%</div></div>	7.65%
Median Wages	9,650.00	10,920.00	<div><div>113.16%</div></div>	Goal Met
Credential Attainment	70.90	61.77	<div><div>87.12%</div></div>	12.88%
Measurable Skill Gains	60.40	70.00	<div><div>115.89%</div></div>	Goal Met

Data as of: 12/31/2024

Dislocated Worker

Measure	Performance Goal	Actual Performance	Percentage of Goal Met	Percentage to Goal
Employed 2nd Quarter After Exit	82.00	0.00	<div><div>0%</div></div>	100.00%
Employed 4th Quarter After Exit	77.40	0.00	<div><div>0%</div></div>	100.00%
Median Wages	8,070.00	0.00	<div><div>0%</div></div>	100.00%
Credential Attainment	75.10	0.00	<div><div>0%</div></div>	100.00%
Measurable Skill Gains	75.00	50.00	<div><div>66.67%</div></div>	33.33%

Data as of: 12/31/2024

Youth

Measure	Performance Goal	Actual Performance	Percentage of Goal Met	Percentage to Goal
Employed 2nd Quarter After Exit	79.30	72.09	<div><div>90.91%</div></div>	9.09%
Employed 4th Quarter After Exit	77.10	71.25	<div><div>92.41%</div></div>	7.59%
Median Wages	3,759.00	4,106.00	<div><div>109.23%</div></div>	Goal Met
Credential Attainment	86.70	93.88	<div><div>108.28%</div></div>	Goal Met
Measurable Skill Gains	91.70	81.82	<div><div>89.22%</div></div>	10.78%

Data as of: 12/31/2024

Wagner-Peyser

Measure	Performance Goal	Actual Performance	Percentage of Goal Met	Percentage to Goal
Employed 2nd Quarter After Exit	70.50	66.08	<div><div>93.73%</div></div>	6.27%
Employed 4th Quarter After Exit	67.10	65.26	<div><div>97.26%</div></div>	2.74%
Median Wages	5,979.00	6,741.50	<div><div>112.75%</div></div>	Goal Met

Data as of: 12/31/2024

LWDB 10

Measures	PY2023-2024 3rd Quarter Performance	PY2023-2024 % of Performance Goal Met For Q3	PY2023-2024 4th Quarter Performance	PY2023-2024 % of Performance Goal Met For Q4	PY2023-2024 Performance Goals	PY2024-2025 1st Quarter Performance	PY2024-2025 % of Performance Goal Met For Q1	PY2024-2025 2nd Quarter Performance	PY2024-2025 % of Performance Goal Met For Q2	PY2024-2025 3rd Quarter Performance	PY2024-2025 % of Performance Goal Met For Q3	PY2024-2025 Performance Goals
Adults:												
Employed 2nd Qtr After Exit	85.40	92.83	80.60	87.61	92.00	81.1	94.30	82.4	95.81	88.3	102.67	86
Median Wage 2nd Quarter After Exit	\$10,343	129.91	\$9,643	121.13	\$7,961	\$11,023.50	114.23	\$10,920	113.16	\$11,320	117.31	\$9,650
Employed 4th Qtr After Exit	85.40	94.89	90.70	100.78	90.00	84.4	99.29	78.5	92.35	80.2	94.35	85
Credential Attainment Rate	78.10	104.13	72.30	96.40	75.00	74.1	104.51	61.8	87.17	51.3	72.36	70.9
Measurable Skill Gains	72.20	90.59	94.90	119.07	79.70	77.9	128.97	70	115.89	74.8	123.84	60.4
Dislocated Workers:												
Employed 2nd Qtr After Exit	0.00	0.00	0.00	0.00	82.00	0	0.00	0	0.00	50	60.98	82
Median Wage 2nd Quarter After Exit	\$0	0.00	\$0	0.00	\$9,000	0	0.00	\$0	0.00	\$7,577	93.89	\$8,070
Employed 4th Qtr After Exit	66.70	76.84	66.70	76.84	86.80	0	0.00	0	0.00	0	0.00	77.4
Credential Attainment Rate	100.00	119.33	100.00	119.33	83.80	100	133.16	0	0.00	0	0.00	75.1
Measurable Skill Gains	66.70	88.93	66.70	88.93	75.00	66.7	88.93	50	66.67	80	106.67	75
Youth:												
Employed 2nd Qtr After Exit	75.00	93.05	67.50	83.75	80.60	68.4	86.25	72.1	90.92	75.6	95.33	79.3
Median Wage 2nd Quarter After Exit	\$3,299	88.28	\$4,017	107.48	\$3,737	\$3,425.75	91.13	\$4,106	109.23	\$4,015.5	106.82	\$3,759
Employed 4th Qtr After Exit	78.40	99.75	75.80	96.44	78.60	77.3	100.26	71.3	92.48	67.1	87.03	77.1
Credential Attainment Rate	100.00	109.65	97.80	107.24	91.20	95.9	110.61	93.9	108.30	91.9	106.00	86.7
Measurable Skill Gains	94.80	106.28	93.60	104.93	89.20	84.8	92.48	81.8	89.20	73.8	80.48	91.7
Wagner Peyser:												
Employed 2nd Qtr After Exit	68.00	97.98	67.70	97.55	69.40	65.9	93.48	66.1	93.76	67.5	95.74	70.5
Median Wage 2nd Quarter After Exit	\$6,592	128.69	\$6,432	125.58	\$5,122	\$6,696.50	130.74	\$6,742	112.75	\$6,694	111.96	\$5,979
Employed 4th Qtr After Exit	70.20	103.08	68.70	100.88	68.10	67.3	98.83	65.3	97.32	64.4	95.98	67.1

Not Met (less than 90% of negotiated)
Met (90-100% of negotiated)
Exceeded (greater than 100% of negotiated)

Request for ITA Waiver- 35%

There are several factors that affect our request for a waiver of the 50% local ITA requirement. These include:

- Loss of Disaster Recovery Grant funds.
- Continuing demand for non-training expense services.
- New non-training service partnerships.
- Rumored new requirements for increased training expenditures in special grants-Rural; and,
- State College funding for free tuition and limited interest.

I. Loss of Disaster funds

The Idalia funding created an impact on our ability to spend ITA funds to the levels you cite: 64.44% and 59.98%.

Our total Idalia grant expenditure over that 2 year period was \$17,130,357.29. This level of expenditures impacts the charges for indirect costs and allocated costs to our other grants, the largest of which are WIOA Adult and WIOA Dislocated Workers. The Idalia grant was allocated, in accordance with our federally approved rates, \$1,884,390.88 (FY23-24) and \$2,056,289.32 (FY24-25).

These allocated charges would normally be borne through our normal grants, of which WIOAAD and DW would bear the largest charges. On the positive side, this allocation to Idalia “freed up” the amount normally borne by those grants for other program use. We placed these dollars in training funds, thereby aiding us in meeting the increased expenditures for ITAs that you have so noted.

For the FY 25-26, we have to absorb the allocated costs back into our normal grant program funds. (As a note, for the 3 years prior to Idalia our funding in these regular grant programs had decreased by 30%. Because of this reduction, we had used attrition and space consolidation, among other steps to reduce the costs which comprise our allocated and indirect costs.)

Now we are faced with less revenue because of the loss of Idalia funds, but constant allocable costs. They are only impacted by such things as annual space lease rate increases and other economy-driven cost escalations. To this

point, WIOAAD and DW must now absorb their share of the \$2,056 289.32, that Idalia bore in the 24-25 FY.

This absorption of indirect and allocable costs restricts our ability to meet the 50% requirement.

II. Continuing Demand for Non-Training Services

Recent labor market analysis on local skills gaps and surpluses and client intake trends indicate that a significant proportion of individuals in our area seeking assistance from the local workforce system do not require formal training to become job-ready. This data, generated through JobsEQ, looks at a one-year sample of demand mix using Real Time Intelligence and a five-year sample of resumes to match job postings with the skills of local talent. Occupations with the highest skill gaps include basic life support, serving, CPR, forklifts, hospitality, point of sale systems, general mathematics and bilingual abilities. Most of these skills are learnt foundationally or on the job with the notable exception of CPR, which does not link to a specific occupation on its own. This trend has been borne out in our area where heavily promoted training opportunities have been eschewed by career seekers in favor of non-training services. Instead, they seek targeted support in the following areas:

- Career Counseling and Job Placement assistance
- Connection to employers, and other forms of employer engagement through multi-employer job fairs and single employer hiring events
- Supportive services that remove barriers to employment (transportation, childcare, tools of the trade)
- Quality follow-up that focuses on employee retention and advancement opportunities

Similarly, our area employers, as our key customer, request services that do not qualify as training. The foremost of these are hiring events/job fairs. Over the past 12 months, our team has conducted 39 recruitment events for employers. When you discount holiday periods, this amount to about 1 event per week. These impact a cross section of our staff's time. Career consultants, business services staff and other team members' time is not a training expense.

Re-employment Assistance services demand an extraordinary amount of resource room and career consultant time to assist claimants in filing claims and determining why their claim is not being processed. Over 25 staff hours per day is spent on assisting RA Claimants in trying to get their claims accepted by the system.

HOPE Florida customer referrals are increasing. While funded for a “navigator”, the actual service provision is handled by three career consultants. Few of these customers desire training.

Our area has seen rapid growth in the last 4 years, leading to a need to assist with finding talent for in-demand sectors like Advanced Manufacturing and Logistics that require minimal formal training for entry-level training. Job-ready individuals who don’t require training can be placed in jobs more quickly with adequate support from non-training services, shortening their unemployment duration and ultimately reducing public assistance dependency.

A waiver reduction to 35% enhances our ability to meet current and evolving labor trends and targeted projects without compromising the long-term goal of upskilling our workforce. It allows us to tailor services to the real-world complexity of each job seeker’s individual needs and aligns workforce service delivery with the guiding principle of providing effective on-ramps to individualized career pathways through multiple service types.

III. New Non-Training

We have experienced success in Levy County offering short-term training such as Broadband and CDL through the College of Central Florida (CF). Together we have worked with the Levy County School Board to work with graduating seniors who have not identified a career objective to enter these certificate programs. In this new year, together with CF and the Levy County School Board, each is designating a staff member to solely focus on the group of juniors and seniors who have not identified a career path. Our costs in this partnership, which, each hope in the long run, will enable more Levy County graduates to define their future, are not training costs. It is an essential partnership to build a talent pool in Levy County which will support their economic development vision. Our team members are meeting to develop their strategy to achieve this goal over the next month, with implementation to begin in October.

This project will also involve exploring additional short-term certificate programs with CF that can be offered in Levy as well as Citrus and Marion.

IV. Rumored new requirements for increased training expenditures in special grants- Rural

In several Teams meetings on the Rural Grants, there has been discussion about requiring increased training expenditures in these grants. Currently, we use these grants for training, but also for operational expenses such as space and

staff. Should this change be required, training costs borne out of WIOAAD and DW will be shifted to the rural grants and those operational costs to the AD and DW programs.

V. State College funding for free tuition and limited interest

Recent grants such as the Open Door program and other State College programs have reduced the financial burden of credential attainment for individuals. These funds take precedence over our WIOA dollars, which kick in after other financial aid streams are applied. Florida's Open Door program targets unemployed, underemployed or low-income individuals, similar to our workforce training programs, and has reduced the reliance on WIOA-funded ITAs. We coordinate with the State College and, where needed, we support the students through support services and other appropriate costs. This support is not required in all cases and where needed does not result in a substantial expense.

We continue to promote workforce training programs, but have seen limited interest in formal training from jobseekers. Over the past two years, we have targeted outreach campaigns through social media, news ads and Geofencing initiatives detailing specific training programs available and tying them to career pathways with local demand and wage data. Despite these efforts, interest in post-secondary training remains lower than anticipated.

This indicates a high preference for direct-to-employment services, prioritizing resume assistance, interview prep and immediate employment over credentialing.

VI. **"Pacing"**

Recovering from an influx of large sums of short term funds, such as our Idalia Grant, back to normal operational funding requires a measured approach that aligns your current commitments that extend beyond the current year, into the next year to be "paced" with your reductions in funding. Otherwise, your training commitments for the extended period exceed your ability. This is especially true in periods of declining overall funding such as we currently find ourselves. Management has the responsibility of managing that transition to ensure that, to the best of its ability, its future commitments align with resources. Our board finds itself in that situation. For this and the reasons stated above, we are requesting an ITA Waiver to 35%.



RECORD OF ACTION/APPROVAL

Executive Committee

Wednesday, August 27, 2025

TOPIC/ISSUE:

Ocala CEP MOU Modification

BACKGROUND:

Following the execution of the statewide contract with the labor market system Chmura JobsEQ on 8/1/2025, local workforce boards will no longer be able to offer a JobsEQ license to partners. This modification replaces the provision of a JobsEQ license to the CEP with the monetary equivalent, updating the supported amount from \$28,050 plus one (1) staff license to JobsEQ at a value of \$1,950 to a total amount of \$30,000. All other terms and conditions of the MOU shall remain unchanged.

POINTS OF CONSIDERATION:

JobsEQ is the software used for data and analysis on demographics, industries, jobs, trades and wages. We previously contracted directly with Chmura JobsEQ. We now must contract through the negotiated statewide agreement, which reduces the cost per license but also restricts our ability to cost share on licenses with partners.

STAFF RECOMMENDATIONS:

Approve a modification from \$28,050 plus one (1) staff license to JobsEQ at a value of \$1,950 to a total amount of \$30,000.

COMMITTEE ACTION:

BOARD ACTION:



RECORD OF ACTION/APPROVAL

Executive Committee

Wednesday, August 27, 2025

TOPIC/ISSUE:

Dislocated Worker fund transfer

BACKGROUND:

Under WIOA local workforce development boards can transfer up to 100% of funding between the Adult and Dislocated Worker programs. Transfers may be done locally up to 25% of the total annual fund allocation. Transfers over 25% of the total annual allocation require formal approval from Florida Commerce.

POINTS OF CONSIDERATION:

We are looking to transfer \$500,000 from our allocation of Dislocated Worker funding and move to Adult Individual Training Account (ITA) funds. We are currently unable to spend our full allocation of DW funding due to low unemployment rates. This transfer will allow us to increase our AD training enrollments from an estimated 127 to 313. This transfer represents 86% of PY 2025 funding allocations.

STAFF RECOMMENDATIONS:

Approve the transfer of funding from Dislocated Worker to Adult.

COMMITTEE ACTION:

BOARD ACTION:

Department of Economic Opportunity (DEO)



Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs
From July 1, 2025 through June 30, 2026

LWDB Number and Name (Requestor): LWDB 10 CareerSource Citrus Levy Marion

Name / Title of Requestor Representative: Dale French, Executive Vice President

Adult and Dislocated Worker Transfer Request						
Program Year	Program	Total Award Amount	Amount of Adult Requested to be Spent on DW	Percentage of Adult Requested to be Spent on DW	Amount of DW Requested to be Spent on Adult	Percentage of DW Requested to be Spent on Adult
2024	Dislocated Worker	578,398.00	0.00	0	500,000.00	86%
COMPLETE THE BELOW SECTIONS FOR REQUESTS THAT EXCEED 25% OF THE PROGRAM'S ANNUAL ALLOCATION						
Reason for requesting the use of one program's funding for the other (e.g. anticipated depletion of current funds, changes in labor market conditions, etc.):						
<p>Due to persistent low unemployment we have had limited enrollments into the DW program (last four years). Unemployment rates remain at 4.5% for the three county area. Our current program year budget allows for a 40.00% ITA allocation. This transfer leaves adequate funding (based on last PY expenditures) to serve any Dislocated Workers requesting services. Two recent WARN notices for our area indicated a total of 3 possible DW eligible affected employees in the area that our Rapid Response coordinators are working to recruit. Current enrollments and attempt at DW recruitment do not warrant the current allocation to remain in DW. Use of federal DWG grant funds last program year has allowed for adequate rollover of DW funding for ITA and work-based initiatives. All AD funding is expected to be expended with an increase in ITA and Customized Training.</p>						
A description of outreach/marketing activities conducted to ensure underserved populations were aware of available services:						
<p>We maintain active involvement with each county's community organizations to ensure all populations are aware of our services. Involvement includes representation on the Marion County Continuum of Care board of governors, United Way organizations and committees in each county, Early Learning Coalitions and Veteran Services of Citrus, Levy and Marion counties. Our career center managers host regular monthly partner collaboration meetings to maximize service availability. Our Business Services unit holds routine hiring and community resource events to share service availability as well as Rapid Response activities. Our communications team uses all available avenues to create and disseminate targeted social media and website promotions to reach focus demographics.</p>						
Labor market conditions contributing to the need for the transfer:						

Unemployment rates have stayed consistent between 4% and 4.5% during the past program year. Partnerships with economic development have led to our understanding of increased future development in the manufacturing, logistics, and warehousing operations within Marion County's growing industrial park and increased interest in land availability in Levy County. Additionally, a need has presented itself for development of a fiber optics program to bolster the efforts of the state to bring broadband infrasture to underserved areas. We are currently conducting cross-regional coordination of Broadband training with Regions 6 and 26 using competitive grant funding from the Department of Labor. Meetings were held with local contractors and service providers in April 2023 to discuss training needs. This led us to apply for the Infrastructure Act funding. All of the participating businesses expressed concerns with a lack of trained workforce to carry out the work. However, this funding only applies to rural counties (Levy County in our case). This transfer will allow for development and funding of training programs in Marion and Citrus counties to meet supply and demand concerns for broadband contractors. Contractors and service providers were slated to receive \$2,688,724 in state funding for broadband infrasture in the last two years. Many of the individuals identified as potential candidates are not dislocated, rather working in the manufacturing and warehousing sectors. Additional funding in AD will allow us to focus recruitment and training efforts on underemployed and young adults leaving the K-12 system that do not intend to continue their education through traditional means while circumventing a disruption in our current manufacturing, logistics and warehousing talent pipeline. We have seen great success using Customized Training for the businesses training needs in Levy County and wish to replicate these successes in our other counties.

The number of participants originally planned to be served by the base allocation compared to the estimated number of participants expected to be served after funds are transferred.

Current: ITA - 66, OJT - 12, Employed Worker - 41, Paid Work Ex/Internships - 8 Total: 127
Proposed: ITA - 166, OJT - 12, Employed Worker - 125, Paid Work Ex/Internships - 10 Total: 313

COMPLETE THE BELOW CERTIFICATION FOR REQUESTS THAT EXCEED 25% OF THE PROGRAM'S ANNUAL ALLOCATION

I certify the following:

1. When transferring from Adult to Dislocated Worker - The LWDB has sufficient funds to serve the WIOA Adult priority populations.
2. When transferring from Dislocated Worker to Adult - The LWDB has sufficient Dislocated Worker funds to serve dislocated workers in the local area; there are no pending layoffs that may impact the need for dislocated workers in the local area.
3. The full board voted to approve this request to transfer funds and a copy of the LWDB's meeting minutes are included with this request.

I certify the above information is true and correct.

Signature of Board Chair

Print Name

Date



RECORD OF ACTION/APPROVAL

Executive Committee

Wednesday, August 27, 2025

TOPIC/ISSUE:

Staff adjustment

BACKGROUND:

Due to increased initiatives in Levy County, we recently made the decision to promote our business development staff in Chiefland to Career Center Manager. This adjustment will combine responsibilities. The staff member will retain their current business engagement and outreach responsibilities while leading the staff in our Chiefland office to meet the evolving needs of businesses and job seekers. We adjusted the staff member's salary with an increase of 15%. This is currently the maximum amount of an increase permitted (Policy 200 – Wage and Salary Administration – Personnel Handbook) without Executive Committee approval.

POINTS OF CONSIDERATION:

A total of 20% increase is required to keep the pay scale competitive and in line with positions with similar responsibilities in the organization. We would like to add an additional 5% increase to the original wage adjustment.

STAFF RECOMMENDATIONS:

Approve an overall increase of 20% with the additional 5% paid retroactive to the date of increased responsibilities.

COMMITTEE ACTION:

BOARD ACTION:



RECORD OF ACTION/APPROVAL

Executive Committee

Wednesday, August 27, 2025

TOPIC/ISSUE:

2025-2026 Budget

BACKGROUND:

Attached is the final budget for the 2025-2026 program year.

POINTS OF CONSIDERATION:

This budget is based on the following:

- Estimated carry forward funds from current year grants.
- Fund transfer from Dislocated Worker to Adult

STAFF RECOMMENDATIONS:

Approve the final 2025-2026 budget.

COMMITTEE ACTION:

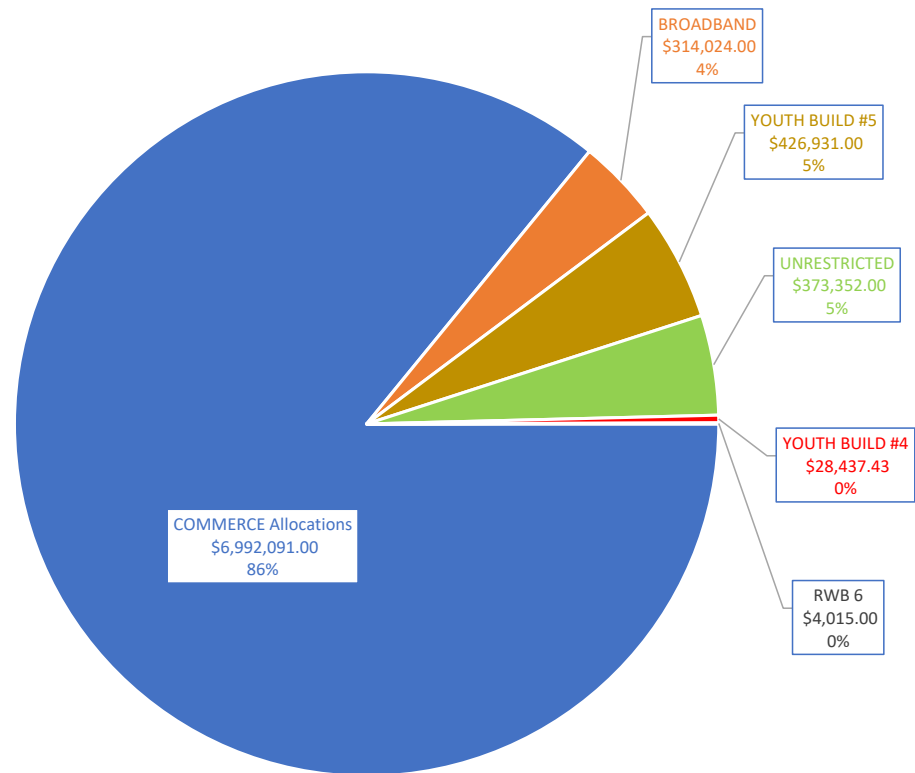
BOARD ACTION:

REVENUE RESOURCES

\$8.14 M

COMMERCE ALLOCATIONS	
ADULT	\$2,403,226
YOUTH	\$1,213,620
DISLOCATED WORKER	\$847,829
WAGNER PEYSER	\$228,124
WTP	\$1,520,051
SNAP	\$123,361
VETS	\$24,336
REA	\$44,034
OTHER	\$587,510
TOTAL Commerce Allocations	\$6,992,091

REVENUES



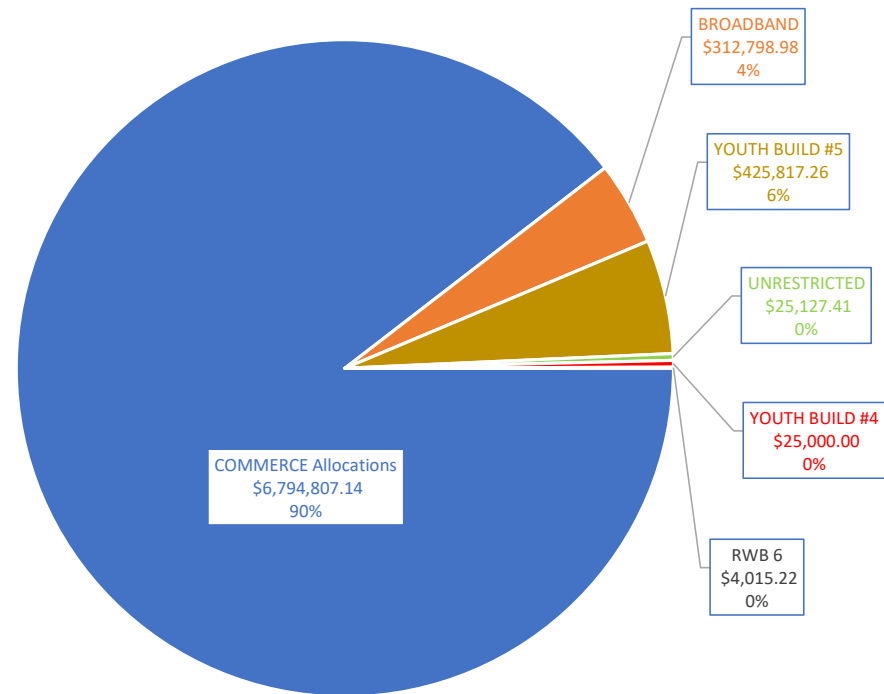
TOTAL REVENUE = \$8,138,850.43

BUDGET EXPENDITURES

\$7.59 M

COMMERCE ALLOCATIONS	
ADULT	\$2,324,227
YOUTH	\$1,202,657
DISLOCATED WORKER	\$817,780
WAGNER PEYSER	\$163,371
WTP	\$1,507,651
SNAP	\$153,186
VETS	\$13,026
REA	\$31,107
OTHER	\$581,802
TOTAL Commerce Allocations	\$6,794,807

BUDGETED EXPENDITURES

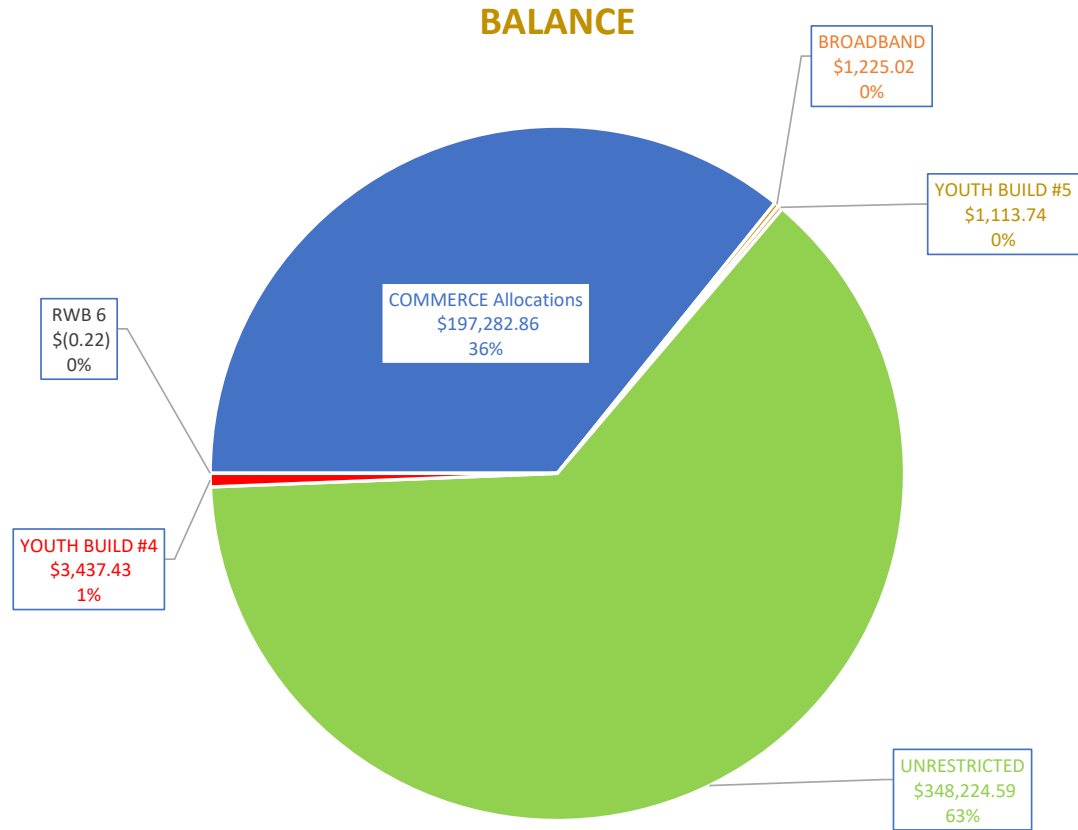


Budget Expenditures = \$7,587,566.00

BUDGET BALANCE

\$0.55 M

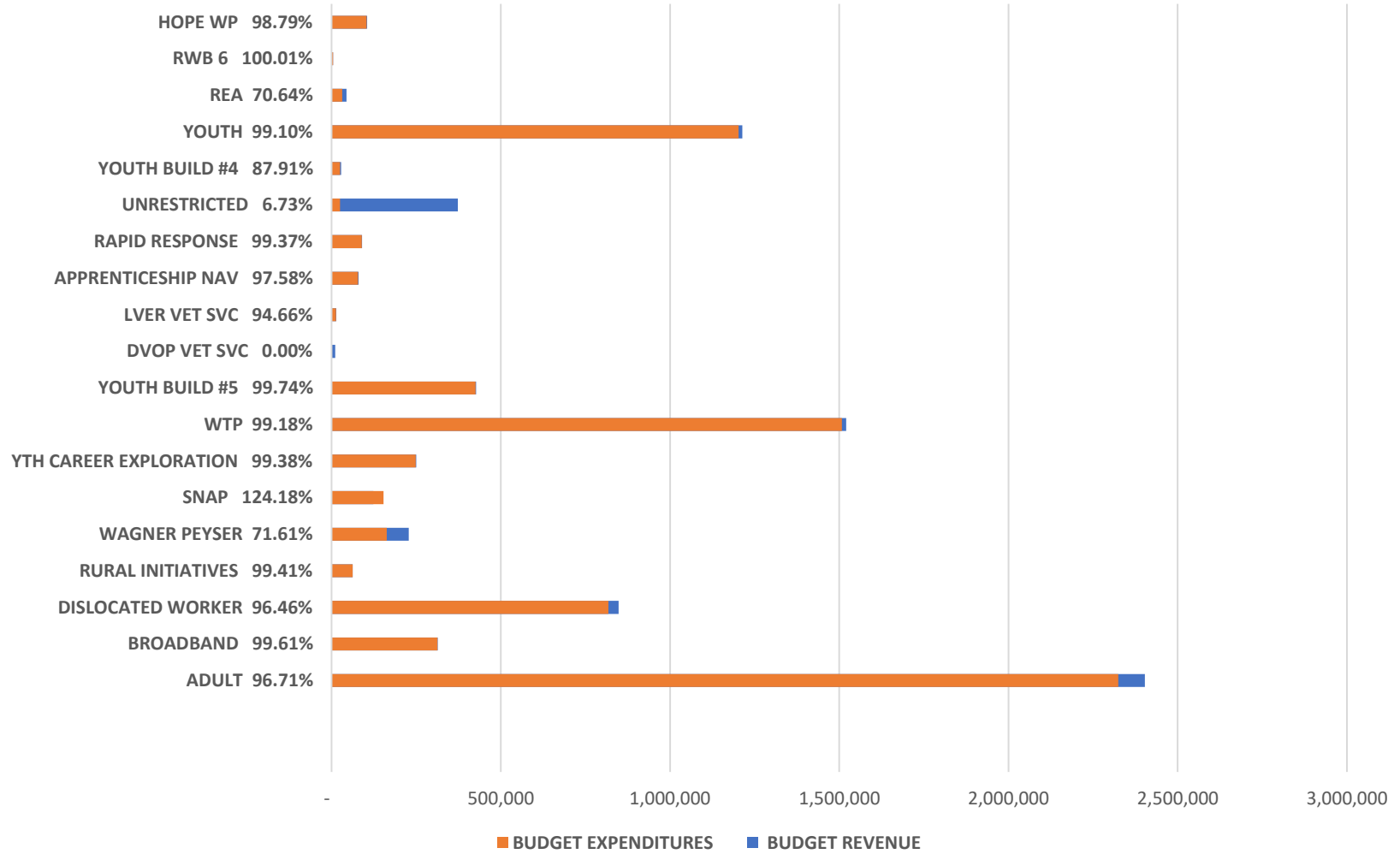
COMMERCE ALLOCATIONS	
ADULT	\$78,999
YOUTH	\$10,962
DISLOCATED WORKER	\$30,049
WAGNER PEYSER	\$64,753
WTP	\$12,400
SNAP	-\$29,826
VETS	\$11,310
REA	\$12,927
OTHER	\$5,708
TOTAL Commerce Allocations	\$197,282



UNOBLIGATED Balance = \$203,058.84

Unobligated Unrestricted = \$348,224.59

% SPENDING





RECORD OF ACTION/APPROVAL

Executive Committee

Wednesday, August 27, 2025

TOPIC/ISSUE:

Finance Interface/Front End RFP

BACKGROUND:

We released a Request for Proposals (RFP) after the initial Request for Information (RFI) from various vendors in search of a replacement for Gazelle. Gazelle is the front-end software used by staff and case managers for processing requisitions and supportive services. Gazelle is scheduled to sunset on December 31, 2025.

POINTS OF CONSIDERATION:

Staff reviewed RFP submissions and watched presentations for two vendors – CSM Consulting and Momentive. After a full review each staff member rated the respondents and their scores were aggregated – attached.

The results of the scoring:

- Momentive – 88.98%
- CSM Consulting – 86.14%

STAFF RECOMMENDATIONS:

Staff recommends engaging Momentive in a service agreement to begin the move from Gazelle.

COMMITTEE ACTION:

BOARD ACTION:

CareerSource Citrus Levy Marion Finance Interface RFP Review 2025

Aggregate Scores

Criteria		Maximum Points	Reviewer Score				
			CSM Consulting		Momentive		
1	Proposed solution provides seamless integration with MIP.	10	9.33		9.5		
2	Proposed solution allows user customization by role.	5	5		4.17		
3	Proposed solution provides detailed and real-time reporting and data dashboards.	10	8.33		8.66		
4	Proposed solution demonstrates acceptable levels of data security	10	9.83		9.83		
5	Proposed solution provides user-customizable reports by grant/fundsource.	10	8.16		8.16		
6	Proposed solution provides access to budgeting and forecasting tools for grant management.	10	8.33		8.33		
7	Demonstrated experience by the proposing entity with system implementation, data migration and user training.	10	8.83		9.5		
8	Proposing entities ability to meet implementation timeline goals set forth in the RFP.	5	4.5		4.66		
9	Proposed solution meets ADA compliance and accessibility standards.	5	4.5		4.5		
10	Overall cost to proposed features and benefits. (If cost exceeds amounts listed in the RFP consider the features and benefits and if the additional cost supports the overall project scope)	25	19.33		21.67		
Reviewers Total Score:		100	86.14		88.98		

Reviewers Signature: _____

Date: _____



RECORD OF ACTION/APPROVAL

Executive Committee

Wednesday, August 27, 2025

TOPIC/ISSUE:

Payroll, HRIS and Timekeeping System

BACKGROUND:

We are currently using ADP for our payroll and timekeeping system. This system does not provide adequate support for Human Resources, compliance, and ease of payroll functions. Reporting is not intuitive and staff feels the system is fragmented. We have been looking at other options to streamline onboarding, improve records retention and put a stronger focus on compliance.

POINTS OF CONSIDERATION:

We recently met with both ADP and Paycom to compare system capabilities and Paycom provides a much more robust system. Average annual costs by system:

- ADP - \$22,140
- Paycom - \$30,590

Difference - \$8,450 annually, \$704.00 monthly

STAFF RECOMMENDATIONS:

Staff recommend switching to Paycom.

COMMITTEE ACTION:

BOARD ACTION:



RECORD OF ACTION/APPROVAL

Executive Committee

Wednesday, August 27, 2025

TOPIC/ISSUE:

Leadership Merit Increases

BACKGROUND:

The Subgrantee Agreement requires Board approval of any leadership merit increases of the top management team.

POINTS OF CONSIDERATION:

Both Dale and Cory have shown exceptional leadership over the past two years: Agile staffing; Temp to Perm; Idalia; Broadband; expansion of CDL and Phlebotomy in collaboration with CF in Levy County to cite a few examples. I deferred any recommendations last year because of the issues surrounding regional board consolidation and regional planning. Those issues are resolved for the immediate future.

STAFF RECOMMENDATIONS:

I recommend both for an increase in compensation of 10%.

I also recommend that Cory's title be changed to Senior Director of Operations this upgrade in title better establishes her role in the company's succession strategy.

COMMITTEE ACTION:

BOARD ACTION: