

November 2, 2017

Thomas Skinner, Chief Executive Officer
CareerSource Citrus Levy Marion
3003 Southwest College Road, Suite 205
Ocala, Florida 34474

Dear Chief Executive Officer Skinner:

This letter is to inform you that based on the recommendation of the Department of Economic Opportunity, your ITA waiver request has been approved by CareerSource Florida. Approval has been granted as follows:

LWDB:	CareerSource Citrus Levy Marion (10)
Request Date:	August 7, 2017
Period of Approval:	July 1, 2017 – June 30, 2018
Approved:	25% ITA Waiver extension within the existing policy

Thank you for your continued commitment to the businesses and job seekers in your local workforce area. Please let me know if you have any questions or if there is anything else CareerSource Florida can do to assist you and your team.

Sincerely,



Andrew Collins
Chief Operating and Financial Officer
CareerSource Florida, Inc.

cc/enc: Mary Lazor
CareerSource Florida

Caroline Womack
Department of Economic Opportunity

Pamela Caudill
Department of Economic Opportunity

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October 12, 2017

CareerSource Florida
1580 Waldo Palmer Lane, Suite 1
Tallahassee, FL 32308

CareerSource Florida:

Pursuant to CareerSource Florida's Administrative Consultation paper "Direct Service Provider Designation", LWDB 10 is submitting the required annual report. The consultation paper requests annual reports to be submitted no later than October 15 of each year.

The attached request includes all necessary items as specified in the guidance. These items are consistent with those provided in our local plan.

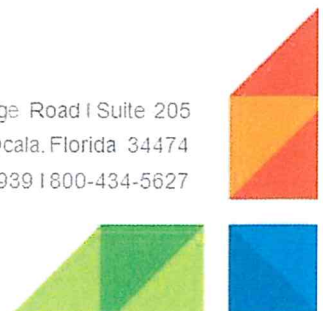
Please contact me with any questions.

Sincerely,

Rusty Skinner
2017.10.14
11:05:55 -04'00'

Thomas "Rusty" Skinner
CEO

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Ocala, Florida 34474
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LWDA 10 – CareerSource Citrus Levy Marion

Direct Services Provider – Annual Report

Overview:

CareerSource CLM (CSCLM) initially took over direct services in 2011. This change to our business model became a necessity due to continued cuts in formula funding and ongoing reduction of services as a direct result. The initial consolidation resulted in a cost saving of approximately \$455,000.00 by compressing the layer of management between the workforce board and the contracted service provider. Since the restructuring of the organizational chart we have retained the same level of management staffing allowing for additional manpower to be added to our most crucial areas of service provision – front line staff and business development. Our intent is to maintain the current level of management and staffing while routinely monitoring effectiveness and efficiency through ongoing continuous improvement efforts.

Since the original re-organization we have also realized a streamlining in management of services and staff by removing a secondary layer of hierarchy. Our current structure allows for direct communication to front line staff. This direct communication eliminates a 'middle-man' and provides a clean, consistent, and unfiltered conduit of information to staff insuring quick turn around on directives and changes in business. It allows us to be more proactive to changes in the economy and business environment by being a more lean and nimble organization.

LWDB 10 was one of the first boards in Florida to commission a One Stop Operator. Procurement has been completed and final contract negotiations were completed in May 2017 allowing for full implementation beginning July 1, 2017. This operator, functioning under the direction of the administrative branch of board staff, will build on our continuous improvement efforts and will work directly with senior management and the board of directors to insure all necessary MOUs are in place, are managed and implemented correctly, and all partner programs are working in tandem to braid and blend formula funding for the greatest positive impact in our workforce area. The provider will also provide recommendations as to methods for added efficiencies and best practices in service provision within career services. Quarterly report attached.

Additionally, we have found that consistent messaging to front line staff will remain an important factor as we move through the full implementation process of the One Stop Operator. All CareerSource CLM and Operator staff will receive the same messaging

so all expectations and service delivery requirements will be managed and delivered to the same exacting level across all programs of the organization.

The Operator will coordinate services within the One Stop career centers, but will not provide direct services. CareerSource CLM staff will continue to deliver basic, individualized, and career services. CareerSource CLM will also continue to provide services for all partner programs that are managed by the One Stop system (see section 6) with the exception of Youth services.

At this time Youth services are contracted to Eckerd Workforce Development. It is our plan to retain a contracted Youth provider due to the complexities and specialization of provision of Youth services.

Administrative Structure:

CareerSource CLM's organizational structure allows for clear delineation between administration and operations. Career Center operations are managed by the Business Services and Career Center Officer. Programmatic support and continuous improvement is driven by the Director of Program Development and the Director of Continuous Improvement. These directors ensure that all partner programs within the One Stop 'system' are performing at maximum efficiency and work directly with the Administrative Manager and EO Officer in regards to internal programmatic reviews and monitoring. The Director of Program Development acts as the liaison between the One Stop Operator and CSCLM senior management.

Administration consists of Human Resources, Information Technology, Finance and Program Development and the Director of Continuous Improvement. The staff members within these departments are not directly involved in the daily execution of services within the One Stop centers, but act as oversight and technical support for management and staff in Operations. Below are the primary roles of each department:

- Human Resources – manages all facets of employee record keeping and staff training and development.
- Finance – daily management and processing of all financial budgeting and AR/AP activities generated by Operations and Administration.
- Information Technology – manages all facets of technology and communications for the organizations. Provides support to staff members in all departments and monitors activities within our system to provide a secure network for customers and staff. Information being transmitted through our network is routinely

monitored to insure that all activities fall within the requirements of applicable State and Federal laws.

- Program Development – Conducts ongoing internal monitoring for programs, service accessibility and One Stop Credentialing. Acts as technical assistance to program management and staff in the One Stop career centers and oversees and manages activities, performance and deliverables for all competitive grants. Program Development also contains the functions of EO for the organization as well as the regional security officer to maintain full controls over all applications and systems used within our One Stop career centers.
- Continuous Improvement – conducts ongoing internal monitoring of all programs beyond that conducted by the Program Development unit. This unit also management customer and employer surveys through the Net Promoter Score to monitor and maintain a high level of services throughout the system.

All departments report to the Executive Vice President who in turn reports to the Chief Executive Officer.

Because we are currently acting as the service provider we manage all partner grants funded through the DEO:

- Wagner Peyser
- Veteran Outreach
- WIOA – Workforce Innovation and Opportunity Act (Adult, Dislocated, Youth)
- TANF – Temporary Assistance for Needy Families
- SNAP – Supplemental Nutrition Assistance Program
- TAA – Trade Assistance Act
- RESEA
- Recently received grants: Homeless Veteran Reintegration Program and YouthBuild

We are working on the same organizational structure and staffing level as during our original request in 2011. At that time, the compression of the organizational chart reduced the management of the provider – eliminating seven positions that would be deemed redundant under direct management. Between benefits and salaries that reduction accounted for a total of \$455,000.00. That savings, coupled with ongoing budgetary reductions allows us to continue providing full services to our customers while maintaining quality and performance. Since our original request to provide direct services in 2011 and our most recent operating budget for program year beginning July 1, 2017 we are currently experiencing a 22% reduction in funding and reached a

disparity level of 42% during the 2016/2017 program year. Annual operating budgets for recent years are detailed below:

Initial Request to Provide Direct Services	PY 2011/2012:	\$10,203,262
Second Request to Provide Direct Services	PY 2013/2014:	\$ 7,260,495
Third Request to Retain Direct Services	PY 2016/2017:	\$ 5,985,492
2017 Request to Retain Direct Services	PY 2017/2018:	\$ 7,937,502

Performance:

The chart below shows the performance figures for LWDA 10 in regards to Common Measures dating back to the program year prior to direct service provision by the board. The dip in AD and DW entered employment rate (PY 13/14) resulted from mass case closures stemming from ARRA enrollments in 2008 and 2009. Many of these cases were inactive and closure was approved through the DEO. The chart shows all performance measures that: Not Met, Met, or Exceeded negotiated performance since these numbers were tracked.

PY 2015 - 2016 FLORIDA WORKFORCE COMMON MEASURES
LWDA 10 - CareerSource Citrus Levy Marion
July 1, 2010 - June 30, 2016 Outcomes

Common Measures	Performance 2010-2011	Performance 2011-2012	Performance 2012-2013	Performance 2013-2014	Performance 2014-2015	Performance 2015-2016	PY 2015-2016 Performance Goals	% of PY 2015-2016 Performance Goal Met
Adults:								
Entered Employment Rate	95.80%	86.90%	91.10%	57.00%	84.75%	74.71%	87.70%	85.19%
Employment Retention Rate	88.80%	93.40%	87.80%	85.41%	93.30%	96.43%	86.10%	112.00%
Average 6-Months Earnings	\$19,674.60	\$16,129.70	\$13,811.20	\$14,105.05	\$16,024.16	\$15,651.31	\$13,533.20	115.65%
Dislocated Workers:								
Entered Employment Rate	94.10%	93.30%	93.30%	53.66%	79.75%	72.22%	87.21%	82.81%
Employment Retention Rate	92.80%	90.80%	91.30%	84.95%	89.00%	94.87%	86.50%	109.68%
Average 6-Months Earnings	\$14,059.30	\$13,982.50	\$13,172.60	\$12,494.72	\$15,986.97	\$15,741.08	\$13,636.40	115.43%
Youth Common Measures:								
Placement in Employment or Education	38.40%	71.40%	87.80%	71.13%	76.47%	74.68%	83.32%	89.64%
Attainment of a Degree or Certificate	46.90%	88.50%	92.40%	90.77%	82.02%	74.30%	92.10%	80.67%
Literacy and Numeracy Gains	30.20%	38.00%	69.20%	64.64%	57.84%	63.08%	68.30%	92.36%
Wagner-Peyser:								
Entered Employment Rate	47.00%	53.00%	Not Available	67.00%	62.95%	60.36%	63.50%	95.06%
Employment Retention Rate	78.00%	81.00%	Not Available	83.00%	84.01%	84.73%	79.00%	107.25%
Average 6-Months Earnings	\$11,357.00	\$11,393.00	Not Available	\$11,449.00	\$11,891.46	\$12,765.00	\$11,160.00	114.38%

Not Met (less than 80% of negotiated)
Met (80-100% of negotiated)
Exceeded (greater than 100% of negotiated)

By eliminating ‘dead’ AD and DW files in 2013 staff could focus on participating cases. The benefit of this purge is exemplified by the steady increase in Employment Retention Rate and quick rebound of 6 Month Earnings for both AD and DW participants. Closer management and ongoing continuous improvement efforts have been marked by a year-after-year performance increase in Wagner Peyser goals each year since 2010.

Best Practices:

Net Promoter Score: LWDB 10 currently uses the Net Promoter Score (NPS) customer service rating system that has become common place in large corporations. Surveys are sent to customers at various benchmarks as they receive CSCLM services. Customers actively participating in each of the partner programs are solicited for feedback on their overall customer experience. The information is reported back to staff and management. We have instituted a ‘closed loop’ approach for any negative feedback (detractors). Any score received that is less than a 9 out of a 1-10 rating receives a call from management inquiring to what could have been done better to improve the customer experience. The chart below is an aggregate display of overall satisfaction for all of our centers. This style of report is broken down internally by office and program to provide real-time satisfaction ratings within our system. This example shows the results of 249 customers surveyed.

Detractors rating: 1-6

Passive rating: 7 or 8

Promoter rating 9 or 10



Outreach: CSCLM participates in bi-weekly radio shows hosted on local talk-radio station WOCA 96.3 in Ocala. These 30 minute radio spots feature staff and partners of the One Stop system to raise community awareness of upcoming events, initiatives and news about the state of the labor force. WOCA has been broadcasting in Ocala since 1959 and is a well-respected source for local news and events.



LWDA 10 One Stop Operator Quarterly Report

THOMAS P. MILLER & ASSOCIATES

Program Year 17 Quarter 1 Summary Report

Activities Completed

- On-Site Project Launch – Completed
Held first on-site meetings to introduce team July 10-12, 2017. Met with staff in each center to discuss our role, answer questions, and outline center processes.
- Memorandum of Understanding – In progress
Conducted preliminary research to understand how other local boards are dealing with infrastructure funding agreements, especially related to non-located partners. Most boards we spoke with are also struggling with this and haven't found a strong solution yet. We are available to do additional research as needed as the process moves forward and a response is received from the State regarding the initial ideas on the agreement between CSCLM and Adult Education.
- Communication – Ongoing
Held multiple calls between on-site meetings to discuss MOUs/Infrastructure Agreements and business services.
- Quarterly Site Visit – Q1 completed
In addition to the on-site project launch, we visited again on September 25-27, 2017 and met with the business services, administrative, and Talent Center teams, and spent one full day at the 14th Street Office speaking with staff and observing customer service and flow.

On-Site Summary/Observations

- The physical/structural customer flow at the 14th Street center seems to make sense and work well. With moving several of the kiosks to the front desk, it is clear where someone should go when they walk in the door, and staff have an easier time directing and assisting. It is clear to customers that there are plenty of resources, with computers being easily accessible and staff ready and available to help when needed. The only piece that doesn't seem to fit as well is the waiting area. With its location behind the front desk, it feels slightly isolated without access to the materials up front, or visibility of the informational tv screens.
- Staff in the resource room and others who rotated up front were all friendly, engaging, and eager to help. Some refining of talking points (do's and don'ts) could be helpful to ensure both clarity and consistency.
 - *What services are available?* How the options are described seems to be slightly different depending on the staff person. Asking whether someone is interested in "self-service" or "seeing a Job Readiness Coach" could be confusing to a new customer, and may be preventing individuals from requesting the services they really need since they aren't sure what those mean.

- *Language to avoid:* referring to CSCLM as a “government agency,” asking or telling someone that they have “barriers,” or using jargon like program names or funding streams.
- Currently there are a lot of cold hand-offs happening – e.g. scheduling an appointment for quick counsel and then having customers wait for the JRC to come find them, or a young adult who walked in and would be eligible for the youth program that was given a flyer and told he would receive a call. There should be more facilitation of those handoffs, actually introducing the customer to the next person that they will be talking to.
- The Quick Counsel option is a great addition, but seems to still be a work in progress. The JRCs aren’t excited about the opportunity and feel that there aren’t customers walking in who need it. Currently this opportunity is being used more for customers who have already been in the center and registered and have a short-term need. There is a need for a clearer definition of what should be referred to the quick counsel and what the assigned JRC should be doing when they don’t have an immediate customer. When there isn’t a customer with an immediate need, this should be an opportunity for the JRC to meet with any new customer that walks in the door and sell the services of JRCs.
- The best value isn’t being realized from the experience of working one on one with the Job Readiness Coaches. Often first meetings with JRCs are used to review the registration and forms that were already completed, and work on resumes or other job readiness aspects are discussed but done independently as “homework.” It seems that these one-on-one services are more process-driven than customer-driven, which is likely a remnant from higher-traffic times when more strict processes were necessary to manage volume. With the current environment, JRC services should be more customized and customer-focused. The contents of these meetings should be reviewed to ensure that customers are receiving added value if they engage in one-on-one services. JRCs also should be able to meet with more than 4 people a day – having a more focused and customized approach to these meetings could help move toward seeing more customers.
- Staff don’t have a clear definition of what “job ready” means. There is a general idea that includes targeting a resume, interviewing skills, and knowing how to job search, but there doesn’t seem to be as much flexibility with understanding how there can be different definitions for different people/positions, or that people can come in only needing pieces of those services. There is less clarity on what to do with someone who walks in already job ready, or very close.
- There are some communication silos within the center, and among staff in general. Different teams don’t have a clear idea of what each function does and, in some cases, don’t seem to see everyone in the center as working together as one entity (e.g. referring to the “Eckerd program” rather than providing any details). There were competing comments of too many meetings, as well as not enough communication, indicating that the current meetings aren’t always used in the most productive or informative way. Information dissemination also seems to be inconsistent among teams, due to different methods and styles of managers.
- Many Business Services staff are very focused on the administrative work related to job orders – entering, updating, maintaining – with other available services coming secondarily. While staff

understand the other services that are available to offer to businesses, the focus on filling jobs and placement seems to take precedence. The Business Services team also seems to have some similar challenges with consistent communication, especially with some staff being located in different offices.

- There was confusion among the business services team about placement goals. Because of the way the metric is calculated, it could discourage business services staff from working together with career services staff since only one side gets “credit” for a placement. This could be partially alleviated by the goal becoming a team goal for business services, but could continue to be a discussion if it does promote competition or further create siloes.

Recommendations

1. **Redefine the role of the Quick Counsel to ensure that all customers who come in the door for the first time speak with a JRC.** This offers an opportunity to “sell” the services of the JRCs, giving customers a clearer picture of what is available. The personal connection also gives them the opportunity to explain more clearly what they need and a reason to come back.
2. **Add “Recruiters” to the Business Services team to focus on sourcing candidates for job orders.** This will allow other business services staff to focus more on other resources that can be offered to employers. It also provides a clearer place to send customers when they enter the center already “job ready” or have completed training or services with a JRC and can move into placement.
3. **Consider centralizing Business services staff at the 14th street office.** Centralizing staff will help to alleviate some of the communication challenges, and promote consistency across the team.
4. **Focus on improving warm hand-offs when moving customers on to next steps.** This is likely a culture change as much as a process change, so will require a change of customer service philosophy. Ensure staff provide face to face introductions and hand offs to the next staff member when possible.
5. **Redefine the role of the Job Readiness Coaches.** Individualized career services should be more customer-focused and incorporate less standard process. The first meeting should be about helping to identify skills, interests, and barriers; setting goals; and starting an individualized service plan to show clear next steps.
6. **Repurpose “Infobits” meetings to have clear agendas aimed at addressing some of the communication issues.** The idea of short meetings several times a week is great, but seems to have not been used to its full potential. Creating a standard agenda, including recent staff-wide announcements, accomplishments, issues encountered and addressed, etc. will help staff to know what is expected. To help with buy-in different staff members could be in charge of leading this discussion each time, and responsible for keeping meetings to the time limit and alerting management if topics are brought up that require further follow up.

Next Steps

- MOU/Cost Sharing
Upon hearing a response from the State on the draft cost-sharing agreement with Adult Education, we can conduct further research as needed to help facilitate how best to allocate

costs. We will continue to stay in contact with other areas who are also in the process of creating agreements to recognize any innovative solutions.

- Best Practices Research

Between on-site meetings we will continue to conduct best practices research related to the strengths and challenges observed and recommendations made. If there are specific topics that are of interest, we can add additional topics for research.

- CSCLM Board Meeting

We discussed being available to participate in the next Board meeting by phone, in order to discuss the work we've been doing and some of the observations we've made with board members.

- Q2 On Site Visit

We will be aiming to schedule our on-site visit to the centers in early December. During that visit, we'd like to spend time at the 14th Street Office again, as well as visiting the offices in Chiefland and Lecanto.