



Performance and Monitoring Committee
College of Central Florida
Enterprise Center, Suite 206
3003 SW College Rd., Ocala, FL 34474

AGENDA

Tuesday, August 6, 2019 – 9:00 a.m.

<http://careersourceclm.adobeconnect.com/performance8-6-2019/>

Conference Call: 1-866-848-2216 – after prompt, enter code 5355193397#

Call to Order		T. Knight
Roll Call		C. Schnettler
Approval of Minutes, May 7, 2019	Pages 3 - 4	T. Knight

DISCUSSION ITEMS

DEO Policy Issuance/Impact on Operations	Page 5	K. Woodring
DEO Response to USDOL	Pages 6 - 7	R. Skinner
Changes to Meeting Agendas and Improvement Suggestions	Page 8	K. Woodring
Workforce Issues that are Important to Our Community		R. Skinner

ACTION ITEMS

Acceptance of DOL Monitoring Report on YouthBuild	Pages 9 - 14	D. French
Acceptance of DEO Monitoring Report from June	Pages 15 - 25	D. French
Experiential Learning Review	Pages 26 - 35	K. Woodring
Experiential Learning Response	TBD	K. Woodring
ED Agreements and Performance	Pages 36 - 40	B. Chrisman

PROJECT UPDATES

Workforce Intelligence - June 2019	Pages 40 - 47	C. Weaver
Performance Measures - May 2019	Page 48	C. Weaver
Quarterly Reports – April – June 2019		C. Weaver
Citrus, Levy, Marion County Reports	Pages 49 - 51	C. Weaver
Mobile Resources Units 1 and 2 Reports	Pages 52 - 53	C. Weaver
Annual Reports – 2018-2019		C. Weaver
Citrus, Levy Marion County Reports	Pages 54 - 56	C. Weaver
Mobile Resources Units 1 and 2 Reports	Pages 57 - 58	C. Weaver
Indicators of Performance – July 2018 – March 2019	Page 59	C. Weaver
Citrus, Levy, Marion Annual Comparison – 2017-2018	Pages 60 - 62	C. Weaver
Talent Center Annual Comparison – 2017- 2018	Page 33	B. Chrisman
Event Report	Page 64	B. Chrisman
ENPS Survey Report and Net Promoter Reports	Pages 65 - 78	S. Litzinger
CLM vs. State 2018-2019 Comparison Statistics	Page 79	S. Litzinger
Staff Performance Metrics	Pages 80 - 89	S. Litzinger

MATTERS FROM THE FLOOR

ADJOURNMENT

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.



**Performance and Monitoring Committee
College of Central Florida
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3003 SW College Rd., Ocala, FL 34474**

2019 – 2020 MEETING SCHEDULE

Business and Economic Development	Performance/Monitoring	Marketing/Outreach	Career Center	Executive	Full Board	
All committee meetings are held at the CF Ocala Campus, Enterprise Center, Room 206						
Thursday, 9:00 am	Tuesday, 9:00 am	Wednesday, 9:00 am	Thursday, 9:30 am	Wednesday, 9:30 am	Wednesday, 11:30 am	
8/22/2019	8/6/2019	8/21/2019	8/1/2019	8/28/2019	9/4/2019	CF Chiefland
11/7/2019	11/5/2019	11/13/2019	11/21/2019	12/4/2019	12/11/2019	MTC Ocala
2/6/2020	2/4/2020	2/12/2020	2/20/2020	3/4/2020	3/11/2020	CF Lecanto
5/14/2020	5/5/2020	5/13/2020	5/7/2020	5/27/2020	6/3/2020	CF Ocala

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**CAREERSOURCE CITRUS LEVY MARION
Performance and Monitoring Committee**

MINUTES

DATE: May 7, 2019
PLACE: College Of Central Florida, Enterprise Center, Building 42, Ocala, FL
TIME: 9:00 a.m.

MEMBERS PRESENT

Ted Knight, Chair
Brandon Whiteman
Fred Morgan
Pat Reddish
William Burda

MEMBERS ABSENT

Kimberly Baxley

OTHER ATTENDEES

Rusty Skinner, CSCLM
Kathleen Woodring, CSCLM
Brenda Chrisman, CSCLM
Dale French, CSCLM

Cira Schnettler, CSCLM
Steven Litzinger, CSCLM
Cory Weaver, CSCLM

CALL TO ORDER

The meeting was called to order by Ted Knight, Chair, at 9:00 a.m.

ROLL CALL

Cira Schnettler called roll and a quorum was declared present.

APPROVAL OF MINUTES

William Burda made a motion to approve the minutes from the February 26, 2019 meeting. Pat Reddish seconded the motion. Motion carried.

ACTION ITEMS

None

DISCUSSION ITEMS

2017-2018 Monitoring Review Close-Out

Dale French informed the board of our receipt of DEO's formal letter accepting our response and closing out of the monitoring review.

PROJECT UPDATES

Workforce Intelligence – March 2019

Performance Measures - March 2019

Quarterly Reports – Jan. – Mar. 2019

Citrus, Levy, Marion County Reports

Mobile Resources Units 1 and 2 Reports

Talent Center

Cory Weaver reviewed the report updates with the committee. She noted that all of the youth participating in the youth programs received an employability credential. She also noted that job orders were up.

Event Report

Cory Weaver explained that the events report shows an increase in activities for the month of March, which is consistent with previous years. Brenda Chrisman was happy to report that Citrus and Levy counties will be hosting youth expos for their respective counties Spring 2020.

Net Promoter Reports

Steven Litzinger provided a summary of the Net Promoter outcomes. The reports are status quo and are very healthy. The SNAP surveys are now being reported separately to get a better picture of what is happening in the program and those results have been growing increasingly positive. Talent Center survey responses are staying consistent.

Steven explained that Net Promoter surveys are also done internally to gauge employee satisfaction. This year's survey will be distributed to staff the last week of May. Previous survey responses have helped leadership be in tune to the needs of staff. Based on last year's responses the dress code was updated. William Burda requested a copy of the survey. A copy will be sent to him via email.

MATTERS FROM THE FLOOR

ADJOURNMENT

There being no further business, the meeting was adjourned at 9:37 a.m.

APPROVED:

DEO Policy Issuance and Impact on Operations

In response to the report issued by DOL/ETA to DEO regarding the specifics of actions and lack of oversight in regions 14 & 15, DEO is making some procedural changes.

On May 24, 2019, DEO issued 3 policies

099 – Job Orders and Placements

098 – Employer Services

096 – Job Seeker Registration

These policies are their attempt to put into place procedures that will deter the other 23 regions from falsifying job seeker registrations, referral to job openings, placements, and the actual assistance to business with posting a job order. All of these were items that region 14 & 15 did in order to increase their performance.

Changes that we have made to our procedures to be in compliance with these policies are:

- We are struggling with the requirement to use the full registration on all candidates who receive a staff service. The partial registration is especially helpful during hiring events, where multiple individuals want to be entered into our system quickly in order to benefit from the hiring event. This new policy requires a full registration before we provide a service. We are now encouraging a full registration, but have instances where we will use the short form, so that we don't lose the candidate. Both registrations include a new section where the customer marks whether or not they give us permission to create or revise their registration, along with the requirement to case note.
- We must have the full registration before we can refer a candidate to a job and we must have the candidate's permission to refer. This is documented with a case note.
- We now must have proof of an employer authorizing us to post their job. Proof is a completed job order form, e-mail from employer, or case note regarding phone conversation.
- DEO is now sending an automatic e-mail to employers when we take a placement in Employ Florida. Unfortunately, the e-mail is branded heavily with DEO and not the brand that employers recognize from the CareerSource system.

We have communicated our displeasure with the way in which the policies were presented and with how checking a box or case noting permission is not going to solve the issue, it just increases work at the front end.

We have also submitted an e-mail to DEO with 22 questions asking for clarification on the 3 policies. We have not yet received any clarification.

From: Dale French
Sent: Wednesday, July 17, 2019 7:49 AM
To: Rusty Skinner; Brenda Chrisman; Kathleen Woodring; Steven Litzinger
Subject: Fwd: Automated Communication to Employers Regarding Hires and Placements

FYI-

More measures being taken by DEO. Got this email from EF.

Dale French

----- Forwarded message -----

From: Employ Florida <systemalert@geosolinc.com>

Date: Jul 17, 2019 12:47 AM

Subject: Automated Communication to Employers Regarding Hires and Placements

To: Dale French <dfrench@careersourceclm.com>

Cc:

Thank you for being a valued business in the state of Florida and helping Florida's job seekers get back to work! The Department of Economic Opportunity appreciates your partnership and commitment to Florida's economy.

Records indicate the following position(s) have been hired for your job order(s) in Employ Florida:

Job Order #	Position Filled	Position Location	Hire Date
10966609	DVOP Employment Security Rep II: CG 56	Ocala	07/10/2019

IMPORTANT NOTE: If you did not authorize the posting of these position(s) in Employ Florida and/or if the position(s) were not hired, please contact the Department of Economic Opportunity Customer Information Center at 1-800-438-4128 or via email at CustomerInfoCenter@deo.myflorida.com.

You are receiving this email, because you are a registered member of Employ Florida, and you were selected as a recipient for an email from another member, staff, or an automated process. If you would like to unsubscribe to all emails from Employ Florida, [Click Here](#).

From: Rusty Skinner
Sent: Friday, July 12, 2019 10:46 AM
To: Dillard, Ruth (Ruth.Dillard@deo.myflorida.com)
Cc: Dennard, Michelle; Robin King (robinking@careersourcefv.com)
Subject: Follow up

I appreciated the call from Ms. Johnson on my email to Director Lawson. I thought that I would share with you the comments that I gave her and amplify somewhat.

First, while I am speaking for myself, I know of no other director who was not embarrassed, and even shamed, by the stories that emerged out of Tampa and St. Pete. We all want a system that we are proud of representing and have been eager of assist in identifying ways to better detect abuse. This is why receiving three policies, 97, 98 and 99, without any opportunity to provide input was so troubling.

When policies are issued simultaneously the fact that we are given 21 days to comment is a rather shallow opportunity. At the local level policies are reviewed by front line managers/supervisors as well as board staff to determine front line impact and insure that our direct service leaders have "buy-in." This becomes even more troublesome when the policies do not have a clear statement as to the problem that they are addressing and are issued without some form of highlighting the changes/additions to previous policies. I can't imagine that such drafts that indicate changes are not provided to the management review team at DEO. We ask for that same courtesy.

As to some specifics of the policies and your corrective action response to USDOL, I would offer the following thoughts.

- With regard to getting "permission of the job seeker", this is a normal business practice for us. We do not document it in case notes. What does that requirement solve? It increases the work for our front line staff, but nothing else. For the abuse that was documented, if someone is falsifying the actual services, falsely entering a case note is nothing that they will flinch at. What is needed is an objective validation. You included that in your response to USDOL saying that you would conduct random contacts of those served. That is the solution. Coupled with an analysis that takes into consideration memory lapse on the part of the jobseeker, it provides meaning full validation. A case note is only a box your monitors will check, rather than the type of qualitative review necessary to prevent future problems.
- Permission to list a job from the employer tracks the same as the above. More work for front line, a box for monitors to check and nothing else.
- With regard to the statement about board member conflicts in the USDOL response, leaving the room during the discussion/vote on an item seems unnecessary. Board member conflicts are recorded in our minutes, they are required to complete Form 8B provided by the Florida Commission on Ethics and that form is attached to the minutes. What is solved by them leaving the room? In my years I have never seen the presence of a board member as a deterrent to comments from other board members- favorably or unfavorably- about a matter.

Had I been provided the opportunity to comment on the three policies and discuss some of the larger issues I would have provided these comments and more so that the policies and approaches taken to provide meaningful oversight. I am sure that my colleagues would have offered meaningful options as well.

Sometimes I feel that the local system is not regarded as a partner, but a subject. I can assure you that while we may push for an approach that is different, we all want a system of integrity and top caliber service.

Thank you for your time and I hope that in the future my comments on reviewing documents can be considered.

Suggested Changes to Meeting Format

We have successfully focused on increasing participation/attendance at the committee meetings and the quarterly board meetings. This is a good sign for the operations of our business, gaining interested and invested board members who have a solid understanding of our business.

We have had the same agenda order for quite some time and wish to have each committee review and suggest any other changes that will be beneficial to sustaining board engagement.

We are suggesting the following change to greater engage communication between staff and the committee chairs. We will designate an upper level staff member to work with the committee chairs both in preparation for the meetings and for reporting committee activity to the full board. Following is our suggested enhancement.

Committee	Staff
Career Center Committee	Dale
Business & ED	Brenda
Performance/Monitoring	Dale
Marketing & Outreach	Kathleen
Executive	Rusty

- Basically on those committee meetings, designated staff will be the main support to the committee chair to discuss the action items and updates or to provide the segway to another staff if necessary. We usually note that on the agenda now, so that should happen pretty smoothly, this part really won't change.
- The designated staff will contact the committee chair prior to the meeting to see if they have any questions about the agenda items and to give any necessary briefings beforehand.
- Following the meeting, the designated staff member will summarize the highpoints of the meeting and provide this summary in writing to the Committee Chair for them to use to report out on the meeting to the full board.
- These committee reports will occur on the Board agenda after the approval of minutes. If the committee chair is absent at the Board meeting, then staff of that committee will step in and provide the summary. This will assist in giving background to business items, so that when we get to the consent agenda, board members are better briefed for the vote.

Should we have a new committee chair; the "staff" will assist through the first few meetings as needed for Robert's Rules.

Rusty and I will attend all of the meetings and will be able to step in if needed. This will continue to provide the focus on our main lines of business.



RECORD OF ACTION/APPROVAL

Performance and Monitoring Committee Meeting August 6, 2019

TOPIC/ISSUE:

Acceptance of the Department of Labor (DOL) YouthBuild monitoring report.

BACKGROUND:

Ms. Sherrie Wilson (Federal Project Officer) from the DOL was onsite to conduct monitoring of the current YouthBuild program on June 3, 4, 5, 2019. She reviewed customer files, financial records and processes, interviewed grant related staff and toured the three build sites available to date.

POINTS OF CONSIDERATION:

The final report revealed no Other Non-compliance issues or findings. No other issues were reported. Ms. Wilson stated during her visit that she was pleased with our program. A copy of the report is attached.

STAFF RECOMMENDATIONS:

Accept the monitoring report as submitted to us from the DOL.

COMMITTEE ACTION:

BOARD ACTION:

U.S. Department of Labor

Employment and Training Administration
Sam Nunn Atlanta Federal Center
Room 6M12 – 61 Forsyth Street S.W
Atlanta, Georgia 30303



July 19, 2019

Dale French
Authorized Signatory
Citrus Levy Marion Regional
Workforce Development Board, Inc.
3003 S.W. College Road
Suite 205
Ocala, Florida 34474-6253

Dear Mr. French:

During the period of June 3-6, 2019, the U. S. Department of Labor (DOL), Employment and Training Administration (ETA), Atlanta Regional Office conducted a compliance review of the following program:

Citrus Levy Marion Regional Workforce Development Board, Inc. YouthBuild Grant
YB-31044-17-A-60-A-12

Enclosed is our report, which resulted in no Findings or Areas of Concern. A response to this report is not required.

Thank you for your assistance and that of your staff during our review. If you have any questions, please contact your Federal Project Officer, Sherrie Wilson, at (404) 302-5345 or Sonja Johnson, Unit Chief, at (404) 302-5337.

Sincerely,

Winston Tompoe,
Acting, Regional Administrator

Enclosure

EXECUTIVE SUMMARY

The review resulted in no Findings.

Please note that the review did not cover any areas outside the defined scope. Although no material issues came to the reviewer's attention, there is no assurance that other issues may not exist.

SCOPE OF REVIEW

Dates of Review: June 3-6, 2019

Date of Exit Conference: June 6, 2019

ETA Reviewer: Sherrie Wilson, Federal Project Officer

Attendees at Entrance/Exit Conference:

CareerSource Citrus Levy Marion Staff

Kathleen Woodring, Executive Vice President

Dale French, Director of Operations

Cory Weaver, Program Development/Reporting Manager

Kimberly Grey, Program Manager, Eckerd Youth Alternatives

Heaven Colon, Eckerd Youth Alternatives

Yvette Moreno, Workforce Development Specialist, Eckerd Youth Alternatives

C2 Global Professional Services, LLC (Sub-recipient Staff)

Caroline Joseph-Paul, Managing Director

Ahmanee Collins-Bandoo, Manager, Data Analysis, Reporting and Quality Assurance

Bob Knippel, Program Manager

Purpose of the Review:

- To evaluate whether the grant program is complying with Federal requirements and is likely to meet projections for enrollments, expenditures and performance outcomes;
- To assess whether the quality of the grant program and services are sufficient to meet performance goals; and
- To identify any technical needs.

In particular, the review assessed whether the grant is operating in accordance under the authority of the Workforce Innovation and Opportunity Act, P. L. 113.28, 2 CFR Part 200; Uniform Administrative Requirements, Cost Principles and Audit Requirements; Final Rule 2 CFR Part 2900; DOL Exceptions to 2 CFR Part 200.

In order to make the above assessments, the Regional Office reviewer interviewed managers and staff regarding the program administration, performance, and financial management aspects of the grant as outlined in the Core Monitoring Guide (CMG). The Regional Office reviewer examined grantee policies, procedures and financial records; and in addition examined participant case files and interviewed program participants.

Grant/Program Reviewed:

YouthBuild Grant – Citrus Levy Marion (CLM) Regional Workforce Development Phoenix Rising YouthBuild (YB)

Period Covered for Review: September 1, 2017 to March 31, 2019

Tool Used for Review: ETA Core Monitoring Guide, Revised April 2018

BACKGROUND

Service Delivery Areas: Residents of West Ocala and Silver Springs Shores located in Marion County, specifically zip codes 34472, 34475 and 34480.

Grant Period in Months: September 1, 2017 – December 31, 2020 (36 Months)

Award Amount: \$806,096

Program Abstract:

The purpose of this program is to fund organizations to provide education, occupational skill training, leadership development and post-program placement opportunities to at-risk youth. YB is a community-based alternative education program for youth ages 16 through 24. Eligible youth may be high school dropouts, adjudicated youth, youth aging out of foster care, youth with disabilities, homeless youth, and other disconnected youth populations. The grantee also seeks to expand the supply of permanent housing for low income and homeless individuals through the construction skills training component of the program.

CLM's Phoenix Rising YB Program is providing 48 low-income youth ages 16-24 with mentorship, career counseling, academics support and leadership training. The grantee is providing a robust and challenging academic program leading to opportunities for youth to transition to post-secondary training should they choose. Phoenix Rising YB is required to provide 24 months of program services ensuring the program design allows for 50 percent of participant's time be spent in academic activities, 40 percent of the participant's time engaged in construction skills training, and 10 percent of the participant's in leadership and community

service activities. The grantee is also required to provide up to 12 months of follow-up services to participants.

Table 1: Key Performance Goals from (9/1/17 - 3/31/19)

Key Performance Goal	Planned Total for Grant Period	Actual Through 3/31/2019	Percent of Total Goal Achieved
Participants Served	48	37/48	77%
Placements	13	11	85%
Credential	37	37	100%
Literacy/Numeracy	35	21	60%

Based on the ETA 9130 quarterly financial report for the period ending March 31, 2019, the grantee reported \$289,994 in grant fund expenditures. In addition, the grantee reported \$119,513 in Match expenditures.

CORE ACTIVITIES 1-3 REVIEWED AS OUTLINED IN THE CMG

Core Activity 1: SERVICE DESIGN & DELIVERY

- Objective 1.a: Planning and Program Design
- Objective 1.b: Implementation
- Objective 1.c: Products and Deliverables
- Objective 1.d: Business Services and Employer Engagement
- Objective 1.e: Participant Services

Core Activity 2: Grant Operations

- Objective 2.a: Project Management
- Objective 2.b: Budget
- Objective 2.c: Property Management
- Objective 2.d: Procurement and Contract Administration
- Objective 2.e: Performance Management
- Objective 2.f: Sub recipient Management & Oversight
- Objective 2.g: Records Management
- Objective 2.h: Personnel
- Objective 2.i: Civil Rights, Complaints, Grievances and Incident Reporting

Core Activity 3: Financial Management Systems

- Objective 3.a: Internal Controls
- Objective 3.b: Accounting Systems and Financial Reporting

- Objective 3.c: Payment and Cash Management
- Objective 3.d: Match and Leverage Resources
- Objective 3.f: Allowable Costs and Cost Classification
- Objective 3.g: Cost Allocation/Indirect Costs
- Objective 3.h: Audits and Audit Resolution

-- END OF REPORT --



RECORD OF ACTION/APPROVAL

Performance and Monitoring Committee Meeting August 6, 2019

TOPIC/ISSUE:

Acceptance of the Department of Economic Opportunity (DEO) monitoring report.

BACKGROUND:

The DEO conducted programmatic monitoring from June 10 through June 18. The review was done remotely through our electronic records system.

POINTS OF CONSIDERATION:

The report attached is the preliminary report issued from DEO. We are expecting to receive the final report this fall. This report reflects Other Non-Compliance issues and Findings that could not be corrected during the monitoring period and will be reflected in the final report. Staff training has either been completed or is underway to address the issues noted in the report.

STAFF RECOMMENDATIONS:

Accept the monitoring as submitted by the DEO.

COMMITTEE ACTION:

BOARD ACTION:



DEPARTMENT OF ECONOMIC OPPORTUNITY
 CareerSource Citrus Levy Marion (CSCLM)
 LWDB 10 Preliminary Review Summary
 June 10-14, 2019

WELFARE TRANSITION (WT) PROGRAM

Participant Case File Review

A total of 45 participant case files were reviewed.

2018-2019 Monitoring Results								
Workforce Program	Issue	Applicable Reference	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Recommendation
WT / TANF	1. Documentation to support JPR hours was not retained in a participant case file.	<u>F.S. 445.010, 45CFR 261.60-62, 45CFR 262, and Florida's Work Verification Plan.</u>	Y	Y	N/A	N/A	N/A	LWDB staff must ensure that documentation or other forms of allowable verification as described in the approved Work Verification Plan are retained in the participant case file and auditable.
	2. There was an instance where a safety plan was not developed for a victim of domestic violence.	<u>Domestic Violence Guidance AWI F G 02-026 and Relocation Guidance AWI FG 01-023.</u>	N	Y	N/A	N/A	N/A	The LWDB program staff must develop a safety plan for all participants that disclose they are victims of domestic violence and ensure that elements from the safety plan are included in the IRP/ARP for victims of domestic violence to identify resources, address barriers to self-sufficiency and to outline the steps to help keep the family safe.

	3. The form DEO WTP-2292 was not mailed and retained in the participant case file for a second failure within 30 days. Also, during the 10- day counseling period OSST case notes were incomplete.	<u>45 CFR 261.14, 414.065 (F.S.), 65A-4.205, Florida Administrative Code, and FG 03-037.</u>	N	Y	N/A	N/A	N/A	LWDB staff must ensure the DEO WTP-2292 form is mailed and retained in the participant case file for a second failure. Additionally, staff must ensure that when an attempt to contact the participant during the 10-day counseling period is conducted and case notes are entered in OSST. The reviewer must be able to determine that the participant was counseled regarding the failure if the penalty is ended with complied or other during the 10-day period.
	4. A participant case file did not contain the required eligibility documentation to support a transitional service. Also, several transitional services entered in OSST were not ended in a timely manner.	<u>445.028-.32, F.S., 65A-4.218 and Transitional Childcare Guidance.</u>	N	Y	N/A	N/A	N/A	LWDB staff must be reminded that program participants must provide proof of continued eligibility each time a transitional service is requested. LWDB staff is responsible for ensuring that documentation is recent and relative to the time period in which the service is being provided. Additionally, if documentation of continued eligibility is not provided, all transitional services must be ended in OSST.
Totals			1	4	0	0	0	

SUPPLEMENTAL NUTRITION ASSISTANCE EDUCATION AND TRAINING PROGRAM (SNAP E&T)

General Comment

A review of the LWDB's local operating plan (LOP) revealed that some of the LWDB's policies and procedures needed updates to conduct the 2018-2019 SNAP E&T program. The updates to the initial engagement and work activity portions of the Local Operating Plan (LOP) were updated during the review and will be presented for approval. CSCLM

maintains an oversight and quality assurance process that examines programmatic operations and practices. Copies of local monitoring procedures and reports were provided to DEO monitors to support the LWDB's monitoring activities.

Participant Case File Review

A total of 47 participant case files were reviewed.

Case files reviewed contained documentation of eligibility and other case management elements, and participant data recorded in OSST was determined to have been correctly entered based on case file documentation requirements in sample files reviewed with the exception of the following:

2018-2019 Monitoring Results								
Workforce Program	Issue	Applicable Reference	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Recommendation
Supplemental Nutrition Assistance Education and Training Program (SNAP E&T)	1. Participant case file was missing a grievance form.	<u>FG 00-004 rev06/08/07, State Plan.</u>	N	Y	N/A	N/A	N/A	LWDB staff must ensure all grievance forms are signed and dated at the time of completion.
	2. Participants were not assigned to 120 hours per month in work activities in combination with employment. Additionally, it was observed several participants were not assigned 80 hrs., however this was clarified through case notes.	<u>7 CFR 273.7(m) (3)(v)(A) and the SNAP State Plan.</u>	N	Y	N/A	N/A	N/A	LWDB must ensure staff accurately assigns, counts and verifies participation hours before entering the information in OSST. This could result in potential questioned costs for overpayment of food assistance benefits to an individual who should have been sanctioned for not meeting participation requirements. Recommend refresher training
	3. A participant did not have a noncompliance requested timely when warranted for failure to meet the mandatory activity requirement.	<u>7 CFR 273.7(f) and the SNAP State Plan</u>	N	Y	n/a	n/a	n/a	Program staff should be reminded that a noncompliance request to DCF must be requested timely for participants who fail to complete the 80 hours per month mandatory work requirement
	4. Entering JS/JST, Education, and WE JPR hours in OSST as	<u>273.7(e)(1); SNAP Toolkit</u>	N/A	N/A	N/A	N/A	N	Though correct number of hours are being enter in case notes and

	weekly hours instead of monthly. Additionally, it was observed that job search is being assign as a stand-alone work activity.							work plans, case mgrs. must ensure to assign monthly JPR hours (80/120) hours in OSST according to SNAP E&T state Plan. Incorrect assignment of hours could result in potential questioned costs for overpayment or under payment of food assistance benefits to individuals who should have been sanctioned for not meeting participation requirements. Also, JS alone does not increase self-sufficiency. Case managers must assign activities to encourage employment.
	1. Entering inappropriate attendance status code to end the 590 Initial Engagement appointment outcome in OSST	<u>Memo dated January 5, 2017</u>	N/A	N/A	N/A	N/A	N	Staff must use correct attendance status per Memo dated January 5, 2017. Incorrect codes will result in incorrect reporting. Recommending refresher training and review of Memorandum.
Totals			0	3	0	0	2	

COLLECTION OF DEMOGRAPHIC DATA

The Demographic Process review tool was used to gather information about CSCLM's practice of collecting demographic data. Staff indicated all customers are asked to register in the Employ Florida system when they first enter the career centers. The registration process advises customers the information requested is voluntary, kept confidential, and only used in accordance to federal law. No issues were found.

FINANCIAL DISCLOSURE

In reviewing the Financial Disclosure Process Tool, CSCLM board members have filed their Financial Form 1F with the appropriate entity. There were board member missing either from the Commission on Ethic's website or LWDB's website. CSCLM's coordinator attests that updates will be made and will be reflected during the next Ethic Commission portal update period, scheduled for July 1, 2019. It is recommended, once updated, that CSCLM's coordinator verify that all board members listed have filed their financial disclosure statements.

Regarding board meeting minutes, it appears that all board meeting minutes have been posted to CSCLM's website, per requirements identified in DEO's email dated May 29, 2018. No issues were observed.

WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA)

ADULT AND DISLOCATED WORKER PROGRAM

Participant Case File Review

A total of 32 participant case files, (27 adults and five dislocated workers) were reviewed.

2018-2019 Monitoring Results								
Workforce Program	Issue	Applicable Reference	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Recommendation
Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker Program	1. In several instances, there was no evidence that follow-up services were offered or provided for a minimum of 12 months following the first day of employment, to participants who were placed in unsubsidized employment.	<u>20 CFR 680.150, WIOA Sec. 134(c)(2)(A)(xiii), TEGL 19-16.</u>	N	Y	N/A	N/A	N/A	CSCLM must review all participant case files that have closed with unsubsidized employment to ensure that follow-up services have been offered and made available for a minimum of 12 months following the first day of employment. Once the offer has been made and if the participant declines further services or cannot be located, documentation of the offer or effort to contact the participant must be added to the participant's case file.
	2. In several instances, measurable skill gains were not recorded in Employ Florida for the applicable program year in which the participants were enrolled in an educational or training program.	<u>22 CFR Part 677.155 (a)(v), WIOA Sec. 116 and TEGL 10-16 Change 1.</u>	N/A	N/A	N	Y	N/A	The LWDB must ensure that measurable skills gains are captured and recorded in Employ Florida for each applicable program year that the participant is enrolled in an educational or training program.
Totals			0	1	0	1	0	

WIOA YOUTH PROGRAM

Participant Case File Review

A total of 15 out-of-school participant case files were reviewed.

2018-2019 Monitoring Results								
Workforce Program	Issue	Applicable Reference	Prior Year Finding	Current Year Finding	Prior Year Other Noncompliance Issue	Current Year Other Noncompliance Issue	Observation	Recommendation
Workforce Innovation and Opportunity Act (WIOA) Youth Program	1. In one instance, measurable skill gains were not recorded in Employ Florida for the applicable program year in which the participant was enrolled in an educational or training program.	<u>22 CFR Part 677.155 (a)(v), WIOA Sec. 116 and TEGL 10-16 Change 1.</u>	N/A	N/A	?	Y	N/A	The LWDB must ensure that measurable skills gains are captured and recorded in Employ Florida for each applicable program year that the participant is enrolled in an educational or training program.
Totals			0	0	0	1	0	

SPECIAL PROJECTS

- Sector Partnership (SP NEG): Five participant case files
- Sector Strategies Bridge to Skilled Trades: Five participant case files
- Sector Strategies Bridge to Skilled Trades II: Five participant case files
- Hurricane Maria: Five participant case files
- Evacuee Assistance: Two participant case files

Participant Case File Review

A total of 22 participant case files were reviewed.

2018-2019 Monitoring Results								
Workforce	Issue	Applicable	Prior	Current	Prior Year	Current Year	Observation	Recommendation

Program		Reference	Year Finding	Year Finding	Other Noncompliance Issue	Other Noncompliance Issue		
Workforce Innovation and Opportunity Act (WIOA) SP NEG SSBST	1. In a few instances, there was no evidence that follow-up services were offered or provided following the first day of employment, to participants who were placed in unsubsidized employment.	<u>20 CFR 680.150, WIOA Sec. 134(c)(2)(A)(xiii), TEGL 19-16.</u>	N	Y	N/A	N/A	N/A	CSCLM must review all participant case files that have closed with unsubsidized employment to ensure that follow-up services have been offered and made available for a minimum of 12 months following the first day of employment. Once the offer has been made and if the participant declines further services or cannot be located, documentation of the offer or effort to contact the participant must be added to the participant's case file.
Totals			0	1	0	0	0	

TRADE ADJUSTMENT ASSISTANCE (TAA)

Participant Case File Review

Two participant case files were reviewed.

General Comment

Participants were enrolled in training but were not co-enrolled in the WIOA partner program. Additionally, in one instance, the participant was not offered or provided supportive services. While not mandated by legislation, it is highly recommended that LWDBs co-enroll all eligible TAA participants into the WIOA program to leverage resources and provide appropriate supportive service.

2018-2019 Monitoring Results								
Workforce Program	Issue	Applicable Reference	Prior Year Finding	Current Year Finding	Prior Year Other Noncompliance Issue	Current Year Other Noncompliance Issue	Observation	Recommendation

Trade Adjustment Assistance (TAA)	1. Time and attendance records and training benchmarks were not found in the participant's case file. Note: This is a combined issue.	<u>20 CFR 617.22, TEGLs 10-11, 7-13, 05-15.</u>	N/A	N/A	N	Y	N/A	Attendance records and training benchmarks must be maintained for all participants who are enrolled in a training activity.
Totals			0	0	0	1	0	

WAGNER-PEYSER (WP) PROGRAM

General Comment

Data from participant case files over the review period was compiled by DEO's Quality Assurance and Policy team. The data trends were identified and discussed with the LWDB, and some items were highlighted during the review of the participant case files. Elements of some of the analysis may be included in the issues below. The data provided was also intended as informational for the LWDB in analyzing business processes, staff practices, LWDB policies, and overall operations of the organization.

The monitoring team reviewed each career center's Migrant Indicators of Compliance (MIC) report for the 7/01/2017 to 6/30/2018 review period. Although the number of MSFWs served were minimal, some shortfalls in meeting established criteria for the Migrant and Seasonal Farmworker (MSFW) equity ratio and minimum service level indicators were discussed with the LWDB. The LWDB was made aware of areas in need of analysis and improvement, including possible strategies to increase the level of services to MSFWs. *Note: The LWDB researched the MSFWs identified in the MIC report during the period above. The LWDB indicated they were only able to validate two job seekers as MSFWs.*

Participant Case File Review

A total of 71 (47 job seekers, 20 job orders, and four RESEA) case files were reviewed.

2018-2019 Monitoring Results								
Workforce Program	Issue	Applicable Reference	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Recommendation
Wagner – Peyser (WP)	1. A couple of placements and obtained employment on a job order were recorded by staff for the same job seeker, the same employer, same position and same job start date. Additionally, a job order had a	<u>20 CFR 651.10; 20 CFR 680.170; TEGL 19-16; and DEO FG-099.</u>	N	Y	N/A	N/A	N/A	Staff must ensure duplicate credits are not claimed for a hire. Staff must verify no automated or manually obtained employment has been recorded in Employ Florida prior to taking a 750-879 hire for a placement for the same

	<p>couple of job seekers' placements recorded for a job with an O*NET code not listed in the job order.</p> <p><i>Note: The LWDB indicated the instances of the placement and obtained employment occurred on job orders prior to the review period; however, the job order was open during the review period and the policy was issued prior to the instances occurring.</i></p>							<p>employer, same position and same job start date. If an automated obtained employment exists prior to the entry of placement, staff must either void the code 881 obtained employment or not take a placement against the job order.</p> <p>Placements on job orders entered in Employ Florida must be for one position matching the single O*NET code listed in Employ Florida. If multiple O*NET type jobs are available, individual job orders must be created for each position with a different O*NET code.</p>
	<p>2. A few job orders reviewed contained a couple of staff-referred applicants that did not meet the minimum job qualifications specified in the job order. Additionally, background information in Employ Florida for a few of the applicants who did not meet the job order qualifications was missing.</p>	<p><u>20 CFR 652.3 and DEP AP 099.</u></p>	N/A	N/A	Y	Y	N/A	<p>The LWDB must remind staff that prior to referring a job seeker to a job, the job order must be adequately reviewed by staff to ensure that the job seeker meets the minimum job qualifications as specified on the job order. Additionally, staff need to encourage job seekers to complete applications to help better match their skills, education, and strengths to the correct job orders.</p>
Totals			0	1	0	1	0	

CAREER CENTER CREDENTIALING

A Career Center Credentialing review was conducted to determine compliance with program guidance. The methodology for conducting the review will include self-certification by the LWDB that the following credentialing requirements had been met for the review period at each of the career center locations in the LWDA (posters, signage and resource room verification). All other administrative requirements and records (listing of front-line staff, continuing education hours attained, complaint system information, etc.) were reviewed by the monitor.

The monitor also reviewed the administrative documents provided to determine whether all “front-line” staff members had completed their required Tier I Certification courses

and the 15 hours of continuing education courses in related subjects. As part of the credentialing process, the monitor reviewed the LWDB's complaint system to ensure that a system is in place to process any Wagner-Peyser complaints received.

The review did not reveal any Findings, Other Noncompliance Issues or Observations.

MANAGEMENT INFORMATION SYSTEMS (MIS)

The Inspector General's (IG) office has conducted a full information security audit of the LWDB, with a final report published in August 2017. The IG conducted a follow-up in February 2018 that resulted in no further action on the LWDB's part. However, review staff conducted the following actions to support answers provided on the Combined Process Management tool completed by the LWDB.

The LWDB provided an up-to-date listing of all MIS users during the review period who have had their status revoked. The monitor matched the names of terminated users on the LWDB's list with user staff accounts maintained by DEO's Internal Security unit to determine whether any of those individuals still had access to the system and/or if their privileges had been revoked. According to the LWDB, a review of all staff access to systems is performed whenever a change in personnel is performed. Additionally, the MIS security forms are maintained electronically or in hard (paper) copy form in a secure location.

The LWDB also appears to have policies and procedures in place to ensure that individuals hired during the review period had a background screening. The LWDB provided a list of new staff hires and the date a background screening was conducted for each employee during the review period.

The review did not reveal any Findings, Other Noncompliance Issues or Observations.



RECORD OF ACTION/APPROVAL

Performance and Monitoring Committee Meeting August 6, 2019

TOPIC/ISSUE:

Review and discussion of monitoring report and response

BACKGROUND:

We conducted a thorough monitoring of 100% of our experiential learning agreements.

POINTS OF CONSIDERATION:

There were concerns noted as detailed in the attached report

STAFF RECOMMENDATIONS:

For discussion at committee meeting

COMMITTEE ACTION:

BOARD ACTION:



2018-19 Quality Assurance Report: Work Based Learning Agreements

Introduction

This report was prepared by Kathleen Woodring, Iris Pozo, Cory Weaver and Dale French as a result of a programmatic quality assurance review conducted on June 26 and 27, 2019 for Work Based Learning Agreements including On the Job Training (OJT) Custom Business Training (Customized Training for Employed Workers) and Paid Internship and Work Experience.

This review substantiated the extent to which staff are following our existing policies, the newly released State Policies, the WIOA regulations, and the report issued by USDOL/ETA regarding the issues in Regions 14 and 15. Prior to this monitoring effort, the Chief Executive Officer sent out the detailed USDOL/ETA report to all staff and requested, that if anyone knew of any action or lack of action such as reported, that they immediately let him know.

This report will be submitted for review by the CareerSource CLM Performance and Monitoring Committee at the next committee meeting, currently set for August 20 at 9:00 am. A written response will be submitted by Business Services staff for review by management and once approved will be made part of this committee agenda. The committee will make formal review and acknowledge actions and programmatic changes to resolve the issues and institute the recommendations made within.

It is the recommendation of the review committee that future staff training for experiential learning agreement development be conducted by the Sr. Director of Business Development, the Director of Operations, the Program Development & Reporting Manager and, the Administrative Manager and EO Officer. This staff will be interim subject matter experts during the previously planned staffing changes for the implementation of a dedicated Experiential Learning Coordinator. This staff will work as long-term technical assistance once the Experiential Learning Coordinator has been trained.

Additionally, the aforementioned staff will work with designated Business Services staff to revise and update local policy and operating procedures as detailed in this report to ensure compliance with all State and Federal laws and regulations.

Purpose of Review

The purpose of the review was to assess program operations during the previous year (beginning July 1, 2018) through June 27, 2019. The goal of the review was to determine if the management and execution of the work-based learning programs was operated in compliance with state and federal regulations, state and local plans, policies and guidance, and all contract and agreement terms.

Description of Review Methodology

The review team reviewed a total of 38 agreements that were written in the specified time period. The review included a multi-faceted approach to insure that policies and procedures were being followed which included the following elements:

- A review of the general elements and execution of each agreement and applicable related documents.
- A review of the Employ Florida system to ensure proper tracking of activities, case notes, job orders and services provided to the participating candidates and businesses.
- A review of the relevance and individuality of associated training plans.
- A review of system data to ensure information was recorded accurately and required services were justified, provided and documented.
- A review of the established billing and payment procedures.
- A review of documentation integrity.

Overview of Results

The outcome of the review is detailed in the following sections of the report identified by the respective agreement type. Outcomes reflect issues noted during the review and suggestions are also made on how to address any identified issues.

Custom Business Training (Customized Training for Employed Workers)

The review consisted of 4 files.

One contract for Ocala Aviation (CBT-18-12-03MT) contained a questionnaire form that stated that the business was not up to date on all state and local tax obligations. An agreement should not be written with any business that states they are not up to date. This response should have been immediately addressed with the business and either corrected (if entered in error) or the business should have been notified that we would not be able to engage in an agreement until all obligations were met. In the case of this agreement the quality assurance review was conducted by the staff member writing the agreement.

Overall, it was the general consensus of the review team that the Custom Business Training agreements were well managed and required documentation was present in the case files. All of the files contained adequate details regarding the training to be administered as well as appropriate backup information for the payments that were made against each agreement.

It was noticed that staff is entering E30 – Entered into Recruiting Agreement activities in Employ Florida when executing Employed Worker training agreements. The appropriate code is E25 - Customized Training.

On the Job Training (OJT)

The review consisted of 20 files.

Of the OJT agreements reviewed all of the files (excluding the five agreements with Lockheed Martin) appeared to have generic training plans. Most often the total numbers of hours included for reimbursement in the agreements were equally divided among the listed job skills to be learned in the plan. Additionally several training plans included skills to be learned listed as: "Work in a team environment", "Other duties to be assigned" and "Assist in warehouse". These are not job specific tasks where quantifiable skills can be learned or documented and should not be included in a training plan unless specific job skills can be attached to them.

Additionally, none of the business profile accounts in the Employ Florida system contained case notes detailing how the hours of training contained in the agreements and training plans was established. Case notes should detail what tools were used to determine the hours of the agreement to justify the reimbursable amounts of each agreement.

Policy OPS-69, On-the Job Training, was not followed. Appears that policy needs to be more specific and recommendations follow.

It was noticed that staff is entering E30 – Entered into Recruiting agreement activities in Employ Florida when executing OJT agreements. The appropriate code is E38 - On the Job Training.

Below is a detail of agreement-specific issues noted:

OJT-18-01-01MS Solar Lights and More

This agreement was reviewed for quality assurance by the writer of the agreement. A firewall must exist with appropriate separation of duties when developing contracts at any level.

OJT-18-10-11LG A&M Manufacturing

This agreement was reviewed for quality assurance by the writer of the agreement. A firewall must exist with appropriate separation of duties when developing contracts at any level.

OJT-18-07-01MS Lockheed Martin

- This agreement did not have a signature in the quality assurance section of the agreement. All agreements should be reviewed to contain necessary documentation, certification of participant eligibility and proper reimbursement amounts prior to execution.
- The Union Concurrence was signed after the first agreement was in place. Additionally, the Union Concurrence in the file only covered a two week period. The form indicated a two week period (May 7, 2018 through May 20, 2018) in which to train 48 individuals. Training was ongoing beyond the concurrence dates.

OJT-18-04-02EV Paul E. Anderson, OD, PA

- The job order in Employ Florida was not properly coded as an OJT order at the time that it was placed out.
- All OJT orders should be reviewed to ensure the job title, O*Net code match the training plan and customer IEP.
- All orders should be coded under special categories as an OJT order.

OJT-18-09-06MS Central Florida Electric

- The Contractor Disclosure form was not dated.
- A total of three agreements were written with CFE (18-09-06MS, 18-01-02MS, 18-09-07MS). Two of the trainees started at \$12.00 per hour and one started at \$15.00 per hour. While each of the trainees appear to have varied skill sets each of the trainees' training plans is nearly identical and were training for a duration of 48 hours in each job skill regardless of 'some' or 'not skilled' in the job tasks.

OJT-18-11-13MS A&M Manufacturing

The training plan included a second page of job skills and hours. It is labeled as a continuation of the job skills from page one. However, it appears that the training plan was copied from another customer. The trainee name, last four, and telephone number is whited out and hand written in. Additionally, the O*Net code and starting wage do not match those as listed on page one.

OJT-18-11-14 Mestizo Foods

Documentation in the file was acceptable, however, the review team felt that the job skills to be learned had excessive durations in the training plan: Sweeping/Mopping floors – 60 hours, Seals shipping containers – 70 hours, Palletize shipping cartons & shrink wrap pallets – 80 hours. More details on the specific job tasks may justify longer duration, but generic headings result in the appearance of excessive hours.

Paid Internship and Work Experience

The review consisted of 14 files.

As noted in the On the Job Training section of this review, the majority of the training plans contained in the files do not appear to have been developed for each individual and in several cases appeared to have been reused from previous agreements. Several instances showed trainees with identical job skills and hours to be trained although the trainee's skill levels were not the same as indicated on the plan (listed as 'some' and 'not skilled').

The majority of the agreements also did not have appropriate documentation in the Employ Florida system under the business account detailing the need, origination or execution of the agreement. There were also no notes on any of the agreements detail how the training plan and hours were developed and justified. Agreements were not listed separately on this report if the only issue recognized was lack of documentation for the training plan since it spanned all agreements.

Policy OPS-79, Paid Internship and Work Experience Training was not followed. Policy improvement suggestions follow under recommendations.

It was noticed that staff is entering E30 – Entered into Recruiting Agreement when executing an internship or work experience training agreement. The appropriate code should be E22 Other Training Service Not Specified.

PI-18-05-03GP USA4Sale

The training plans contained in the agreement files do not match the training plan that was signed by D. French on May 29, 2019. This was validated by reviewing a copy of the training plan that was e-mailed to the agreement originator on the same date. The customer and business accounts in the ATLAS system contain two different training plans - each time stamped the same by the

quality assurance review. Neither copy matches the training plan signed by D. French. It was determined that the training plan was changed after it was reviewed without the knowledge of the signing staff. The file did not contain the appropriate modification documentation. The file did not contain any notes from the business services staff detailing agreement origination or modification.

PI-18-06-01MS TMichel Productions, LLC

A business profile for this company could not be located in the Employ Florida system. Therefore no documentation could be obtained to justify the training plan or need for the agreement. The customer file did contain the appropriate documentation from the WIOA case manager.

PI-18-01-01MS SPX Flow, Inc.

The training plan included a task to be learned labeled *Other duties assigned by manager. However, the agreement included a three page job description with detailed duties. Greater care should be involved in ensuring that training plans contain job skills relevant to the occupation.

PI-18-08-03MS Front Street

This agreement did not contain any job skills on the training plan. It simply stated "Please see attached details for specific functions". Review of the attachment did not reveal any associated training hours with the job skills. Eight areas were completed in the training plan detailing hours with no corresponding job skills. See screenshot below:

Section 3: Occupational Information (Complete The Occupational Information For The trainee's Skill Level)			
JOB TITLE: Marketing Assistant		O*NET : 13-1161.00	
JOB DESCRIPTION (may attach)*: See Attached			
WORKSITE'S TYPICAL ENTRY WAGE: \$15.00		TRAINEE WAGE RATE? \$13.50	
#	REQUIRED JOB SKILLS FOR OCCUPATION:	CAPABILITY:	TRAINING HOURS:
1	Please see attached details for specific functions	NOT SKILLED: <input checked="" type="checkbox"/> SOME SKILL: <input type="checkbox"/>	24
2		NOT SKILLED: <input checked="" type="checkbox"/> SOME SKILL: <input type="checkbox"/>	24
3		NOT SKILLED: <input checked="" type="checkbox"/> SOME SKILL: <input type="checkbox"/>	24
4		NOT SKILLED: <input type="checkbox"/> SOME SKILL: <input checked="" type="checkbox"/>	24
5		NOT SKILLED: <input checked="" type="checkbox"/> SOME SKILL: <input type="checkbox"/>	24
6		NOT SKILLED: <input checked="" type="checkbox"/> SOME SKILL: <input type="checkbox"/>	24
7		NOT SKILLED: <input checked="" type="checkbox"/> SOME SKILL: <input type="checkbox"/>	24
8		NOT SKILLED: <input type="checkbox"/> SOME SKILL: <input checked="" type="checkbox"/>	24
9		NOT SKILLED: <input type="checkbox"/> SOME SKILL: <input type="checkbox"/>	
10		NOT SKILLED: <input type="checkbox"/> SOME SKILL: <input type="checkbox"/>	
TOTAL TRAINING HOURS:			192

PI-18-08-04MS Front Street

- This agreement states its duration at 312 hours in Section II. However, it also states that it will be 40 hours per week for 8 weeks. This would equate to 320 hours.
- The agreement does not contain a date of signature by CareerSource Citrus Levy Marion management.
- The file contained a modification form adjusting the total hours and duration of the agreement, but the form is missing the effective date.

PWE-18-05-01GE Hospice of Marion County

- The contract states it is effective from 5-3-2019 through 6-30-2019. Contract was signed by B. Chrisman and H. Shepardson on 5-9-2019 and 5-7-2019 respectively. Contracts must be signed on or before the day they are effective. It was verified in the case file that training did not occur prior to 5-9-2019.
- Contract expires on June 30, 2019. However, the duration of the agreement in the training plan runs through August 3, 2019. There was not an updated agreement or modification form in the case file to permit any payment beyond June 30, 2019. A new agreement will need to be executed prior to any payments for time worked after June 30, 2019.
- The employer profile in Employ Florida did not contain any case notes or activities for the business regarding paid work experience.

PWE-18-01-01MS A Better U Healthcare, dba Acusleep

- No 'E level' activities entered under the business account in Employ Florida.
- The training plan appears to have been adjusted after the agreement was executed as it contains hand written adjustments to the hours for the job skills to be learned.
- No modification form could be located in the file to justify the changing of training hours.

PEW-18-01-02MS Meme's Care at Home, Inc.

- No case notes in the business profile justifying the training plan or hours included.
- No follow up on the agreement was notated in the Employ Florida system on the business account. Follow up was conducted with the trainee by WIOA case management staff.
- The training plan appears to have been modified after the agreement was signed. All of the hours on the original job skills to be learned were adjusted and an additional task of "Networking events as necessary" was hand written onto the training plan.
- No modification could be located in the file to justify the changing of training hours or adjustment of job skills to be learned.

PWE-18-05-02MT

- Contract has handwritten contract number on all pages. Documents are created in fillable .PDF format and should be typed to avoid errors and misprinted information.
- The Federal Identification Number line on the contract appears to have been whited out and hand written over. White out should never be used on a contract. Adjusted errors should be documented on a modification form or 'lined through' and initialed if a non-monetary adjustment is made. Any changes require agreement by all staff involved.

PWE-18-08-02MS Marion County Board of County Commissioners

- The contract contains two numbers: PWE-18-08-02MS and PWE-18-07-02-MS. A modification should be completed verifying the correct number.
- Employer contact name is misspelled on the training plan.

PI-18-01-03MS SPX Flow

This file contained a case note indicating that the worksite agreement started. However, the note shows a contact date of January 23, 2019 and the note was entered on April 4, 2019. The note did not indicate that it was delayed entry. Staff should further develop the agreement desk aid located on the intranet to include all steps of processing an agreement to prevent missing details.

Overall Recommendations

- **Quality Assurance/Monitoring**
The quality assurance check that is currently conducted on all newer formats of agreements was not designed to take the place of programmatic monitoring. The quality assurance check that is conducted has been a check of the final agreement boilerplate to ensure it is properly completed, the training participant(s) are eligible for services and enrolled and the training duration is equal to the maximum reimbursable amount depending on the type of agreement. It is recommended by the review team that this practice be eliminated. In turn, on-going monitoring will be conducted on new agreements as part of routine WIOA programmatic reviews and all agreements will be required to have in-person site visits conducted during the training period as explained in the **Necessary Local Policy Changes** section.
- Business Services staff should work with operations staff to develop processes within local policies **OPS – 68 Custom Business Training**, **OPS – 69 On the Job Training** and **OPS – 79 Paid Internship and Work Experience Training** to standardize how training proposals are submitted to management for review and approval. Proposals should include all documents used to qualify the participating business as well as training hours justification. Proposals should not contain training PII.
- Staff should regularly review the board membership roster at www.careersourceclm.com to be familiar with current board membership. Contracts may not be executed with board members without prior board approval. Prior approval of master contracts is conducted with board members each June.
- Staff should thoroughly case note how they are evaluating the customer and business to determine training hours to overcome identified skills gaps (see additional recommendations in the policy change section below). Staff should research tools that can standardize the skill assessment process to better justify training hours.
- Monthly follow up on OJT and Paid Internship and Work Experience agreements must be conducted with the business and notated in case note form in the business profile in Employ Florida. WIOA staff follow up with the trainee. Review of trainee accounts showed satisfactory follow up on the trainee side.
- Consistent business activity coding processes should be put into place (E level codes in Employ Florida).
- Any changes made to an agreement after execution must be done so using the standardized Contract/Agreement Modification form (FM-CS-021). Under no circumstances should any agreement be altered after being signed by any party without appropriate modification documentation.
- Handwriting should not be permitted on any agreement. Changes made in handwritten form cannot be verified and suggest that the alterations were made after the agreement was executed.
- Staff should verify that all information as it is disclosed on the Questionnaire forms. Any answers that indicate that a business is ineligible for training assistance should be investigated further by staff.
- **OPS-79 Paid Internship and Work Experience** states that each trainee is provided an orientation prior to enrollment by the business services staff originating the training plan. Orientation must include an overview of payroll services, worksite rules and expectations. The review team could not find any case notes in the system that indicated an orientation was conducted by business services staff. Many case files contained documentation and staff signatures that indicates these elements of the agreement development were handled by WIOA staff. Business services staff are responsible for the creation of the training plan.

- Proper development cannot occur if staff have not met with the candidate and the business.
- It is also important to note that new EF coding has been released for additional apprenticeship activities. Staff should be diligent when coding business activities to determine if the training that is being developed/discussed is a first step in an apprenticeship and to make sure to code properly (most relevant for Lockheed Martin considering increased statewide apprenticeship development).

Necessary Local Policy Changes

On-the-Job Training

- Our policy needs to include a discussion of the initial assessment tool and how this tool will be used to determine skills gaps during development of the training plan.
- State policy 009 for OJT (page 9) requires a detailed process for reverse referrals. We need to include this additional detail of the process in our policy.
- The determination of the skills gap and skill requirements for the job needs to be included in the ISS. (State policy 009 - page 5)
- We need to require an on-site visit of the OJT contract by the BDM/BDC who wrote the contract at least one time during contract period. We recommend this occurs mid-way through contract. This will help to remind participants of our inclusion in the process of providing training.
- We need to require that “board” staff or an outside monitor provide on-site monitoring of each employer at least one time annually. This review will include an in-depth review of each agreement, the associated training plans, skills gap determination, Employ Florida and file documentation. An interview will be conducted with each participating business to ensure proper creation and execution of the agreement has taken place. This method will encourage increased scrutiny of content and adherence to procedures by the agreement creators and signors.

Paid Internships and Work Experience

- Need to provide more detail in our definitions as to the difference between a work experience and an internship. It would be helpful if we included transitional jobs into the policy.
- Both of these relationships are intended for serving the customer and providing them the necessary experience to obtain employment. Because of this, we question why we are conducting a background check on every individual? This appears like we are trying to screen our customers out instead of screening them in.
- Paid Internships and Work Experience creates an employee/employer relationship, we calculate our payment based on hours worked, so we recommend that the word stipend be removed and discuss as wage.
- State policy 100, states that Custom Driven Staffing should sign each agreement. (page 2 #5.)
- We need to provide a detailed process for reverse referrals for OJT, Internship and Work

Experience.

- We need to include more details on development of the training plan. These training goals will be different for each individual and for each circumstance. Example: A participant who is in a transitional job WE, may have goals such as demonstrating ability to show up for work on time and every day scheduled, where an internship will be more about taking a skill and learning how to put it into practice.
- Require an on-site visit to employer at least 1 time a year by the BDM/BDC and the “Board” staff for purposes of monitoring.

Local Custom Business Training

- In the regulations and according to State policy, what we have always referred to as employed worker, is now called “customized training for employed workers”.
- We need to remove Incumbent worker training from this policy. Incumbent worker training makes the employer eligible and not necessarily the individuals. This policy needs to stand alone, with all incumbent restrictions removed from the customized training for ***OPS-68 Custom Business Training***.

CareerSource Citrus Levy Marion is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers listed above may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711. If you need accommodations, please call 352-840-5700, ext. 7878 or e-mail accommodations@careersourceclm.com at least three business days in advance. Additionally, program information may be made available in Spanish upon request. A proud partner of the American Job Center Network.



RECORD OF ACTION/APPROVAL

Performance and Monitoring Committee Meeting August 6, 2019

TOPIC/ISSUE:

Approval of agreements with the three economic development entities and discussion on enhancing performance.

BACKGROUND:

CareerSource Citrus Levy Marion (CSCLM) contracts with the **Chamber & Economic Partnership** (CEP) for Marion County, **Nature Coast Business Development Council** (NCBDC) for Levy County and the **Citrus County Chamber of Commerce for Citrus County** to provide extended resources and support to businesses in their local areas.

We know that each of these entities have strong relationships with the local business community and with their ongoing business outreach services. These agreements provide additional financial support to allow these entities the ability to support business outreach and market CSCLM services and talent supply to those businesses they are working with.

Each of the agreements are unique to each entity; however they all share a common strategy of expanding business outreach and marketing the benefits of how CSCLM can assist businesses.

POINTS OF CONSIDERATION:

Due to our boards recent discussion on ensuring we are managing performance on each of our contractual agreements, we have completed a review on the current performance agreements and have identified some concerns in each of the three agreements.

In order to ensure each contractor is meeting their contractual requirements, we are being proactive by establishing some new language in the agreement, while offering technical assistance.

Effective PY 19/20, we are adding new language to each of the agreements with a hold back clause on payment. Here is the language added on each agreement for PY 19/20:

This is a pay for performance agreement and is subject to a 5% performance holdback if performance is not met after 2 full quarters. Any hold back retained can be recouped if all criteria are met prior to end of the program year of June 30, 2020.

In addition, we have met with each of the contractors to discuss the holdback and offer customized solutions to support any areas of concerns they are having with meeting performance, as well as offered opportunities to modify their scope of work.

We have created a side by side spreadsheet outlining each contracts current performance as it relates to year end goals and will submit the report to the BEDC quarterly.

We have established weekly contact with our newest contractor to monitor current performance and activity to ensure they are on target.

In the event performance is not met by each contractor by 12/31/2019 – additional measures will be taken to monitor and provide additional technical support as needed.

STAFF RECOMMENDATIONS:

Approve the recommended changes to the EDC agreements and recommend suggested practices for enhancing performance for PY 19/20.

COMMITTEE ACTION:

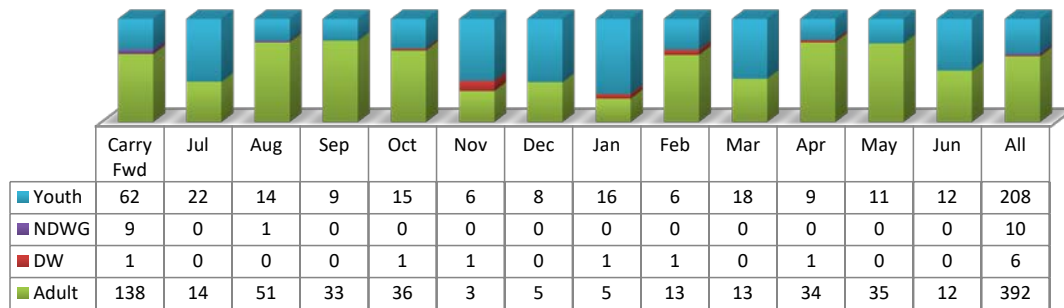
BOARD ACTION:

	1st Quarter			2nd Quarter			3rd Quarter			4th Quarter					
CITRUS - Citrus Chamber of Commerce - Start Date 2/1/2019	July	August	September	October	November	December	January	February	March	April	May	June	YTD	Notes	PY 18/19 YTD Goals
Jointly conduct 4 Business Retention and Expansion visits quarterly (16 total/year)											3	3	6		6
10 Business leads a year referred for labor needs/OJT, Internship/CBT												7	7		3
CareerSource CLM will provide training to all staff on each of the above services and training.								1					1	2/27/2019	Completed
Quarterly meetings with Brenda Chrisman to discuss workforce and/or business retention challenges within the county.								1			1		2	3/19/2019 & 6/11/2019	2
Invite CareerSource CLM to participate in all industry outreach and/or meetings set up and/or coordinated by the CEP												1	1	Citrus Bus Alliance Meeting	1
Referral of at least 3 existing business monthly for professional/skilled job openings - (36 per year) as part of Talent Center promotion												0	0		15
At least 3 business referrals per month for career opportunity listings/candidate referrals												3	3		15
At least 6 business referrals for internships per year.											2	2	4		2
At least 6 business referrals for OJT per year.											5	3	8		2
At least 6 business referrals for existing worker training per year.											3	3	6		2
Distribute materials to promote school-to-work transitions for high school graduates.											1	1	2		1
CareerSource CLM will be responsible for the printing and production of the materials that will be jointly developed.												1	1		n/a
Provide at least 8 business leads per year to participate in the Talent Pipeline video series: Leads shall be in industry areas that are jointly agreed upon and referenced in a separate document.											1	1	2		3

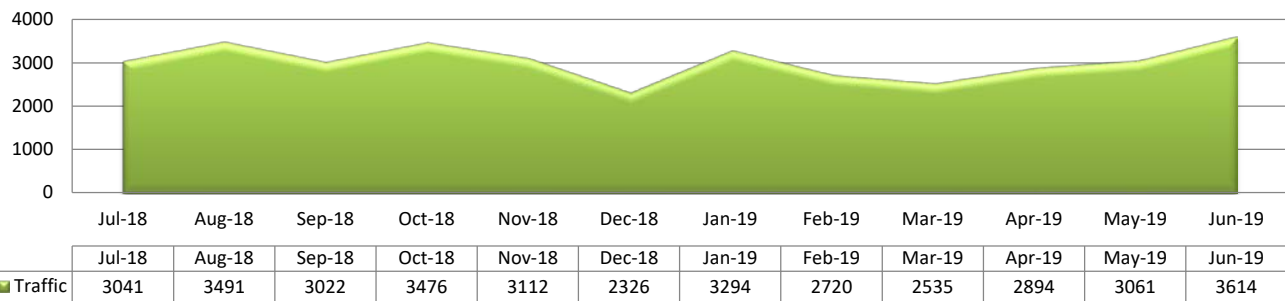
LEVY - Nature Coast Business Development Council	1st Quarter			2nd Quarter			3rd Quarter			4th Quarter					
NCBDC will achieve the following objectives during program year 2019/20. Coordination of these goals will be outlined on monthly invoices.	July	August	September	October	November	December	January	February	March	April	May	June	YTD	Notes	YTD Goal
2 Business Retention and Expansion visits a month (24 total/year)	1		1	1									3	7/24/18 - meet with MTC / future training needs	24
2 industry spotlight videos a year that feature work CareerSource/other community partners have done for those profiled													0	Still in the works	2
Reintroduction of Business Alliance with "courtesy" seat for CareerSource, with a slot as guest alliance for at least one session a year.				1									1	Bus Alliance Luncheon / Grow Florida	1
E-newsletter notations that will on a monthly basis include CareerSource stats (employment numbers, placements, activity, job fairs, etc.) Additionally, increase social media integration.	1	1	1	1	1	1	1	1	1	1	1	1	12	Completed	12
Annual personalized state of the county address to include related content from previous bullet point (presented in graphical format)													0		1
3 business leads a year (One from out-of-region; two expansion/existing) referred for labor needs/OJT				1			1				1		3	Completed	3
Quarterly meetings with Brenda Chrisman; monthly meetings with business development managers to discuss trends, needs, and other info-sharing		1		1			1					1	4	Completed	4
Arrange for at least three community/civic group presentations for CareerSource, and the goal of an annual industry appreciation/business showcase with CS as a featured partner/presenter				1									1	Grow Florida	1

MARION - Chamber & Economic Partnership	1st Quarter			2nd Quarter			3rd Quarter			4th Quarter					
CEP will achieve the following objectives during program year 2018/2019. Coordination of these goals will be outlined on monthly invoices.	July	August	September	October	November	December	January	February	March	April	May	June	YTD	Notes	YTD Goal
Jointly conduct 2 Business Retention and Expansion visits quarterly (12 total/year)												0	0		24
10 business leads a year (One from out-of-region; two expansions /existing) referred for labor needs/OJT – Internship, Custom Business Training (CBT)	0	2	2	2	2	0	2	1	4	0	3	0	18		10
Quarterly meetings with Brenda Chrisman to discuss workforce and/or economic development challenges within the county		1				1	1				1	1	5		4
Invite CareerSource CLM to participate in all industry outreach and/or meetings set up and/or coordinated by the CEP	1	3	2	1	2	1	0	1	1	2	0	1	15		n/a
Referral of at least 3 existing business monthly for professional/skilled job openings - (36 per year) as part of Talent Center promotion	3	2	3	3	2	3	3	1	3	4	5	3	35		36
At least 3 business referrals per month for career opportunity listings/candidate referrals	3	2	62	3	2	3	3	1	3	4	5	2	93		36
At least 6 referrals for internships per year	0	0	0	2	2	3	0	0	2	1	0	0	10		6
At least 6 referrals for OJT per year	0	1	1	0	0	3	0	0	0	4	1	0	10		6
At least 6 referrals for existing worker training per year	0	1	0	0	1	3	0	0	1	4	1	0	11		6
Develop and distribute joint materials to promote school-to-work transitions for high school graduates	0	1	4	3	3	1	4	3	4	7	4	1	35		n/a

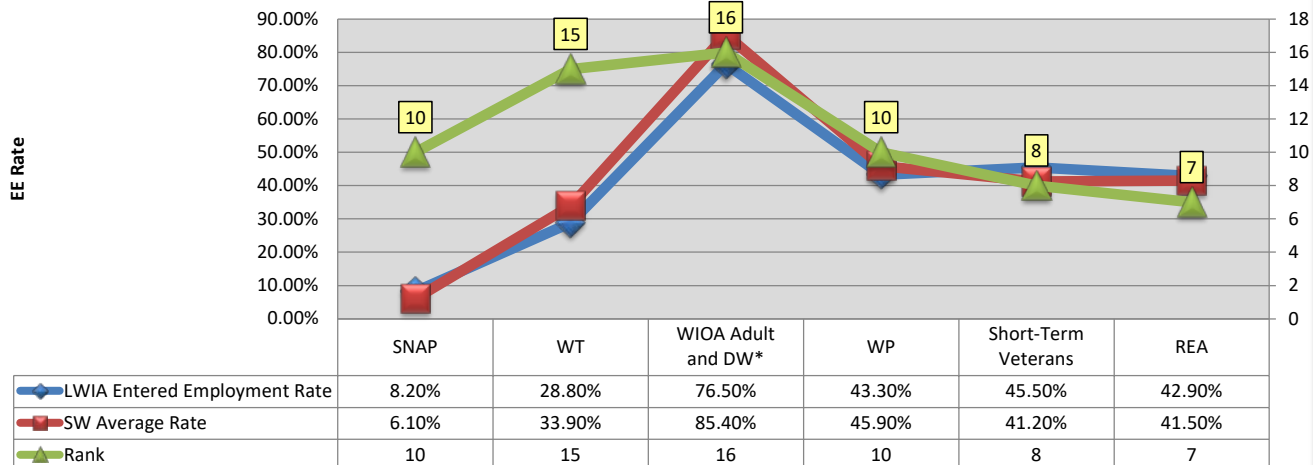
All WIOA Participant Enrollments



Center Traffic - 12 Months

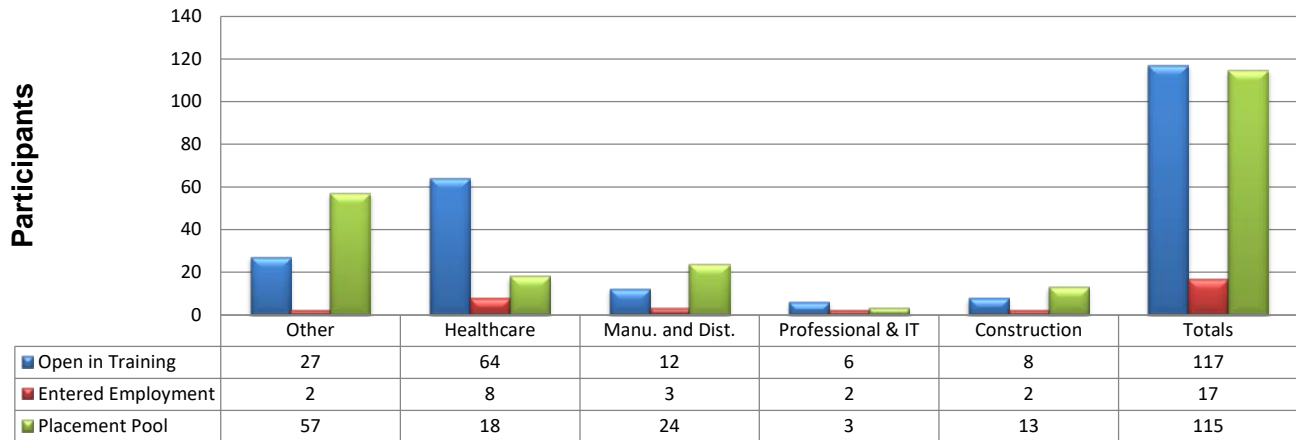


MMR Entered Employment Rates by Program

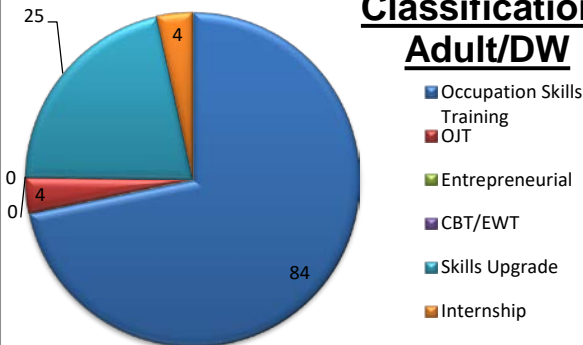


*#1 Ranking shared between 15 RWB's

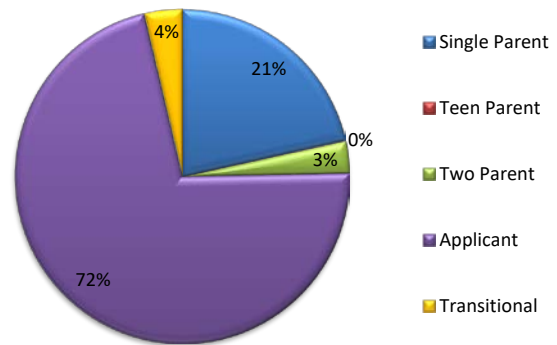
WIOA Industry Training Comparison



Open WIOA Training Activity Classification-Adult/DW

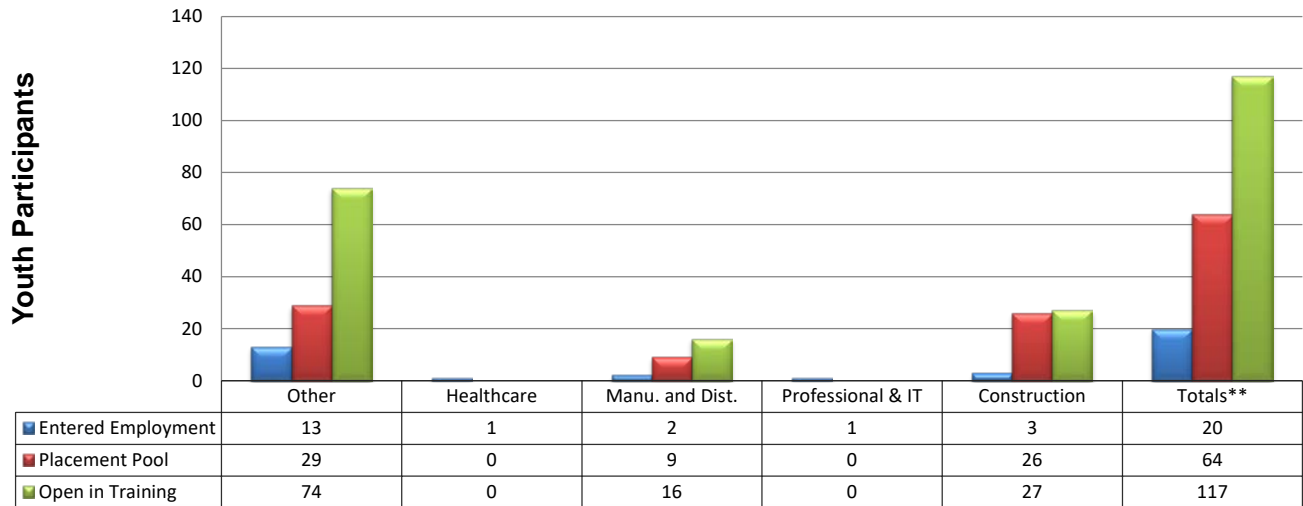


Current WT Caseload Breakdown

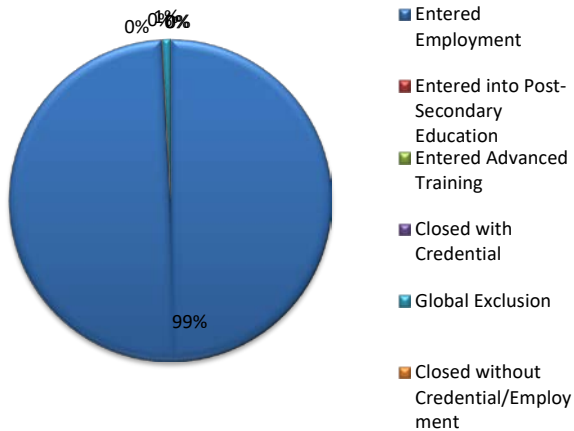


Traffic	Jun-18	Jun-19	YTD 17.18	YTD 18.19
Newly Registered Job Seekers	317	331	5,611	3,840
Total Job Referrals	3,560	1,858	53,863	29,280
Managed Job Orders	509	488	4,734	6,327
External Job Orders	4,945	2,781	28,587	32,498
Overall Traffic	2,814	3,614	41,743	36,586
Receiving Reemployment Assistance	1,973	852	7,834	6,566
Welfare Transition	Jun-18	Jun-19		
Participation Rate All Family	33.3%	30.5%		
Case Load	244	221		

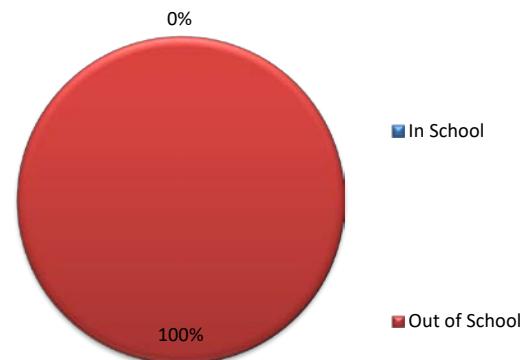
WIOA Youth Industry Training Comparison



Youth Placements Breakdown



Youth Breakdown by Enrollment Code



Youth Carry Forward:	62	AVG Closure Wage (With Credential):	\$10.35
Total Youth Closed:	117	AVG Closure Wage (No Credential):	N/A
Total Youth Served:	208	ROI for PY 17/18 Youth Services:	\$1,813,034
Average Training Lifespan:	36		

Traffic		PY 11-12	PY 12-13	PY 13-14	PY 14-15	PY 15-16	PY 16-17	PY 17-18	PY2018 2019												
									JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	YTD
Center Traffic	14th Street	56,740	53,605	44,783	36,852	34,101	35,557	28,800	1,998	2,218	1,950	2,292	1,824	1,590	2,167	1,761	1,642	1,911	2,038	2,335	23,726
	Lecanto	16,493	13,489	10,675	9,231	8,448	8,071	6,278	513	645	533	566	482	391	587	445	436	455	578	761	6,392
	Chiefland	6,921	7,256	6,838	6,066	5,653	5,431	4,085	411	438	380	359	319	266	383	344	282	331	315	308	4,136
	Talent Center				1,214	1,458	697	1,319	67	116	82	134	76	57	62	63	90	81	109	135	1,072
	*MRU 1	-	616	1,413	1,280	1,257	800	902	33	58	67	116	228	-	64	88	52	100	3	53	862
	*MRU 2	509	939	970	750	342	282	359	19	16	10	9	183	22	31	19	33	16	18	22	398
	Total	80,663	75,905	64,679	55,393	51,259	50,141	41,743	3,041	3,491	3,022	3,476	3,112	2,326	3,294	2,720	2,535	2,894	3,061	3,614	36,586
Online Traffic	Citrus		164,006	139,121	98,047	71,187	57,011	37,587	2,463	2,635	2,249	1,931	1,871	1,489	2,016	1,571	1,407	1,644	1,503	1,755	22,002
	Levy		40,095	32,850	23,645	14,461	12,971	10,745	663	693	610	487	446	429	659	510	429	466	521	285	6,089
	Marion		433,283	363,536	242,259	180,839	155,810	116,901	8,158	7,912	6,155	6,712	5,470	4,743	6,413	4,785	3,888	4,804	4,781	4,911	67,101
	Other		73,533	55,999	36,540	23,425	8,356	12,218	754	837	550	553	423	389	559	438	295	364	340	364	6,387
	Total		710,917	591,506	400,491	289,912	234,148	177,451	12,038	12,077	9,564	9,683	8,210	7,050	9,647	7,304	6,019	7,278	7,145	7,315	101,579
Off Site Events	Events					22	126	147	8	5	12	6	25	10	10	14	8	16	14	7	135
	Attendees					1,808	4,535	4,028	70	202	264	154	158	320	688	200	205	215	780	150	3,406
Wagner Peyser		PY 11-12	PY 12-13	PY 13-14	PY 14-15	PY 15-16	PY 16-17	PY 17-18	PY2018 2019												
Newly Registered Job Seekers	Marion	6,174	6,089	5,050	4,440	3,981	4,081	3,883	241	255	228	208	171	188	254	201	169	213	225	220	2573
	Citrus	2,949	2,384	1,970	1,665	1,420	1,442	1,323	94	98	90	77	78	62	103	87	68	73	76	89	995
	Levy	813	706	537	403	339	376	375	26	30	18	23	21	23	32	20	12	25	20	22	272
	Total	9,936	9,179	7,557	6,508	5,808	5,899	5,581	361	383	336	308	270	273	389	308	249	311	321	331	3,840
Total Employers Posting Jobs	Marion	729	819	801	848	748	724	705	414	371	377	381	389	348	372	385	382	364	351	383	724
	Citrus	262	333	308	307	305	308	283	72	87	89	104	94	89	67	77	114	90	80	68	155
	Levy	66	79	72	84	90	82	77	27	24	28	31	27	26	23	27	28	23	23	20	54
	Total	1,057	1,231	1,181	1,239	1,143	1,114	1,066	513	482	494	516	510	463	462	489	524	477	454	471	933
Managed Job Orders	Marion	2176	2059	2396	2801	3054	3326	3514	348	403	324	397	371	373	406	412	489	552	409	370	4854
	Citrus	600	549	704	686	736	815	934	74	90	125	85	73	80	62	101	176	100	103	88	1157
	Levy	147	109	171	156	214	163	213	22	22	18	11	22	15	14	18	28	17	23	28	238
	Other	136	171	114	102	177	177	73	4	14	6	11	10	2	7	4	5	8	5	2	78
	Subtotal	3059	2888	3385	3745	4181	4481	4734	448	529	473	504	476	470	489	535	698	677	540	488	6327
	External Job Orders	16017	21542	22415	30704	33972	31693	28587	1,804	1,675	4,594	2,738	2,103	2,474	2,745	2,970	3,014	2,834	2,766	2,781	32,498
	Total	19068	24430	25800	34649	38121	36174	33321	2,252	2,204	5,067	3,242	2,579	2,944	3,234	3,505	3,712	3,511	3,306	3,269	38,825
% of internal vs. total		16.04%	11.82%	13.12%	11.39%	10.88%	12.39%	14.21%	19.89%	24.00%	9.33%	15.55%	18.46%	15.96%	15.12%	15.26%	18.80%	19.28%	16.33%	14.93%	16.30%
Welfare Transition		PY 11-12	PY 12-13	PY 13-14	PY 14-15	PY 15-16	PY 16-17	PY 17-18	PY2018 2019												
Open Case Load	Marion	972	1,131	1,216	1,355	1,286	1,073	942	158	169	169	199	182	151	143	141	137	151	164	166	902
	Citrus	461	359	353	422	384	379	311	50	56	54	58	57	40	46	43	31	33	41	40	272
	Levy	200	197	186	161	180	150	136	26	34	27	22	31	28	26	21	20	18	17	15	108
	Total	1,633	1,687	1,755	1,938	1,850	1,602	1,389	234	259	250	279	270	219	215	205	188	202	222	221	1,282
Participation Rate	All Family	45.90%	44.40%	41.20%	44.10%	35.80%	30.70%	36.50%	33.00%	33.10%	33.60%	41.30%	37.20%	42.30%	40.60%	40.60%	36.00%	36.60%	35.90%	30.50%	36.90%

*All November 2018 MRU numbers represent hurricane recovery efforts in the panhandle

Training		PY 09-10	PY 10-11	PY 11-12	PY 12-13	PY 13-14	PY 14-15	PY 15-16	PY 16-17	PY 17-18	PY2018 2019												
		JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	YTD									
Occupation Skills Traing	Citrus	427	237	171	172	118	115	142	121	91	14	19	9	21	18	18	14	21	28	31	28	62	122
	Levy	172	124	74	53	73	68	54	34	24	4	5	5	6	9	8	6	6	8	6	6	4	19
	Marion	1366	1761	792	617	389	339	224	233	335	120	121	113	125	113	92	125	115	111	125	135	365	
	Subtotal	1965	2122	1037	842	580	522	420	388	450	138	145	127	152	140	118	145	142	151	148	159	201	506
Skills Upgrade	Citrus	0	5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	6	6
	Levy	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	1	2	
	Marion	3	159	20	4	0	0	0	0	2	1	1	1	1	0	0	0	0	27	46	18	59	
	Subtotal	3	166	20	4	0	0	0	0	2	1	1	1	1	0	0	0	0	28	46	25	67	
OJT	Citrus	9	29	18	11	3	8	8	13	4	1	2	2	1	1	1	1	0	0	0	0	0	3
	Levy	1	3	5	0	0	1	0	0	0	0	1	0	1	2	0	0	0	0	0	0	3	
	Marion	103	150	129	29	18	22	11	14	81	24	43	52	31	17	0	6	7	6	5	4	4	97
	Subtotal	113	182	152	40	21	31	19	27	85	25	46	54	33	20	1	7	7	6	5	4	4	103
Entrepreneurial	Citrus	0	0	0	0	0	0	0	0	3	0	0	0	0	0	0	0	0	0	0	0	0	0
	Levy	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Marion	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0
	Subtotal	0	0	0	0	1	1	0	0	4	0	0	0	0	0	0	0	0	0	0	0	0	0
Internships	Citrus	0	32	4	5	4	1	5	2	4	1	0	0	0	0	0	1	1	2	1	0	0	3
	Levy	0	6	5	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0
	Marion	0	113	97	11	6	0	4	3	9	4	4	4	3	3	0	2	1	2	2	3	3	12
	Subtotal	0	151	106	17	11	1	9	5	13	5	4	4	3	3	0	3	2	4	3	3	4	15
Customized Training	Citrus	7	17	13	233	214	8	5	2	7	0	0	0	0	0	0	0	0	0	0	0	0	0
	Levy	4	7	1	10	7	2	0	1	6	0	0	0	0	0	0	0	1	1	1	1	0	1
	Marion	51	100	72	186	110	26	21	21	58	2	2	2	0	0	0	1	0	5	5	5	0	10
	Subtotal	62	124	86	429	331	36	26	24	71	2	2	2	0	0	0	1	0	6	6	6	0	11
Total		2143	2745	1401	1332	943	591	474	444	625	171	198	188	189	163	119	156	151	167	190	218	234	702
Placements		PY 09-10	PY 10-11	PY 11-12	PY 12-13	PY 13-14	PY 14-15	PY 15-16	PY 16-17	PY 17-18	PY2018 2019												
		JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	YTD									
Citrus		423	626	1363	703	374	343	260	225	189	7	8	12	11	7	15	24	7	10	15	3	3	122
Levy		49	193	357	178	129	93	87	86	70	2	3	5	8	3	5	8	9	3	4	2	0	52
Marion		1622	2099	4461	2418	1640	1171	1275	944	1008	26	82	66	67	51	46	135	56	34	28	30	22	643
External/New Hire Report		203	267	77	8309	11428	9735	8680	6167	3002	128	151	140	207	145	133	145	167	169	166	170	144	1865
Total		2297	3185	6258	11608	13571	11342	10302	7422	4269	163	244	223	293	206	199	312	239	216	213	205	169	2682

*Training data is reported by activity. This data does not represent distinct individuals.



Workforce Intelligence

June 2019

CBT Agreements PY2018

Carry Forward from PY 17/18	1	Number Served	12
New for PY 18/19	5	Amount Spent	\$25,033.49

Business	Industry	Outcome Certification	Total Trained	Employer Contribution	CareerSource Reimbursement	Contract #	Begin	End Date	Status
Ocala Aviation	Transportation	Flight Instructor Multi-engine	1	\$667.00	\$5,220.00	CBT 17-04-17 MT	5/7/2018	8/31/2018	Complete
Ocala Aviation	Transportation	Flight Instructor Pilot Training	1	\$612.00	\$5,508.00	CBT 18-07-01 MT	7/2/2018	5/30/2018	Complete
Artemis Plastics	Manufacturing	Lead Auditor	1	\$403.34	\$3,626.79	CBT 18-08-02 MS	8/13/2018	8/31/2018	Complete
Ocala Aviation	Transportation	Flight Instructor Multi-engine	1	\$474.50	\$4,270.50	CBT 18-12-03 MT	12/14/2018	1/11/2019	Complete
WINCO	Manufacturing	Medical Device Risk Management	2	\$1,658.72	\$1,658.72	CBT 18-03-01BJ	3/19/2019	4/20/2019	Complete
Artemis Plastics	Manufacturing	Corrective and Preventative Action	6	\$608.61	\$4,749.48	CBT 18-03-02 LG	3/20/2019	3/29/2019	Complete

OJT Agreements PY2018

Carry Forward from PY 17/18	9	Number Served	105
New for PY 18/19	20	Amount Spent	\$84,843.36

Business	Industry	Outcome Certification	Total Trained	Employer Contribution	CareerSource Reimbursement	Contract #	Begin	End Date	Status
Scorpion Engineering	Manufacturing	CNC Operator	1	\$2,400.00	636.65	OJT 17-04-18 LG	04/23/18	07/15/18	Completed
Solar Lights and More	Construction	Solar Technician	1	\$1,440.00	997.02	OJT 17-04-17 MS	04/23/18	07/15/18	Completed
Alien Engineering Products	Manufacturing	Welder	1	\$1,440.00	4244.4	OJT 17-04-16 MS	5/3/2018	7/25/2018	Completed
OFAB	Manufacturing	Parts Sorter	1	\$2,640.00	2640	OJT 17-04-19 MS	5/3/2018	7/25/2018	Completed
OFAB	Manufacturing	Assembly	1	\$2,640.00	2454.38	OJT 17-04-20 MS	5/3/2018	7/25/2018	Completed
eResources	Technology	Support Desk Technician	1	\$1,800.00	1800	OJT 17-05-21 GP	5/14/2018	7/1/2018	Completed
Solar Lights and More	Construction	Solar Technician	1	\$3,120.00	1291.29	OJT 17-05-23 MS	5/14/2018	8/5/2018	Completed
Air FX	Other	HVAC Technician	1	\$1,680.00	359.63	OJT 17-06-24 MS	6/5/2018	8/27/2018	Completed
Lockheed Martin	Manufacturing	Electronic Associate	12	\$5,160.00	3440	OJT 17-06-25 MS	6/18/2018	7/2/2018	Completed
Lockheed Martin	Manufacturing	Electronic Associate	7	\$3,010.00	2789.63	OJT 18-07-01 MS	7/30/2018	8/12/2018	Completed
Marion Metal Works	Manufacturing	Admin Assistant	1	\$1,200.00	535.88	OJT 18-07-02 MS	7/31/2018	9/30/2018	Completed
Lockheed Martin	Manufacturing	Electronic Associate	14	\$6,020.00	6020	OJT 18-08-03 MS	8/13/2018	8/26/2018	Completed
Lockheed Martin	Manufacturing	Electronic Associate	20	\$8,600.00	8420.48	OJT 18-08-04 MS	8/27/2018	9/9/2018	Completed
Lockheed Martin	Manufacturing	Electronic Assembler	16	\$6,880.00	6734.88	OJT 18-09-05 MS	9/10/2018	9/23/2018	Completed
Central Florida Electric	Construction	Electrician Helper	1	\$1,440.00	4104	OJT 18-09-06 MS	9/24/2018	12/16/2018	Completed
Central Florida Electric	Construction	Electrician Helper	1	\$1,800.00	285.87	OJT 18-09-07 MS	9/24/2018	12/16/2018	Completed
Lockheed Martin	Manufacturing	Electronic Assembler	13	\$5,590.00	5418	OJT 18-10-08 MS	10/8/2018	10/21/2018	Completed
A & M Manufacturing	Manufacturing	Fiberglass laminator	1	\$3,520.00	3520	OJT 18-10-10 LG	10/24/2018	2/13/2019	Completed
A & M Manufacturing	Manufacturing	Build Team Assembler	1	\$3,520.00	1444.22	OJT 18-10-09 LG	10/24/2018	2/13/2019	Completed
A & M Manufacturing	Manufacturing	Build Team Assembler	1	\$3,520.00	2760.37	OJT 18-10-11 LG	10/30/2018	2/19/2019	Completed
A & M Manufacturing	Manufacturing	Fiberglass Laminator	1	\$3,520.00	125	OJT 18-11-12 MS	11/14/2018	3/5/2019	Completed
A & M Manufacturing	Manufacturing	Lamination Leader	1	\$4,560.00	1788.5	OJT 18-11-13 MS	11/14/2018	3/5/2019	Completed
Mestizo Foods, LLC	Manufacturing	General Utility Packer	1	\$1,430.00	3525.47	OJT 18-11-14 MS	11/19/2018	2/17/2019	Completed
Solar Lights and More	Construction	Solar Technician	1	\$1,680.00	4594.07	OJT 18-01-01 MS	2/4/2019	5/5/2019	Completed
Central Florida Electric	Construction	Electrician Helper	1	\$2,880.00	2985.81	OJT 18-01-02AW	1/28/2019	4/28/2019	Completed
DS Contracting, LLC	Construction	Commercial Painter	1	\$1,680.00	5040	OJT 18-02-01 AW	2/27/2019	5/28/2019	Completed
Monterey Boats	Manufacturing	HR Assistant	1	\$2,400.00	2197.81	OJT 18-04-01 BJ	4/22/2019	6/17/2019	Completed
Paul E Anderson, OD, PA	Healthcare	Receptionist/Technician	1	\$2,080.00	\$2,380.00	OJT 18-04-02 EV	4/25/2019	6/25/2019	In Process
Sandalwood Rehabilitation	Healthcare	Office Administrator	1	\$2,310.00	\$2,310.00	OJT 18-06-01 EV	6/24/2019	9/16/2019	In Process

WE Agreements PY2018

Carry Forward from PY 17/18	1	Number Served	9
New for PY 18/19	8	Amount Spent	\$22,289.47

Business	Industry	Position	Total Trained	Wage	Begin	End Date	Status
Allin Family Dentistry	Healthcare	Dental Assistant	1	\$12.60	4/23/18	7/15/18	Completed
MC Board of County Commissioners	Other	PT Circulation Assistant	1	\$8.74	7/2/18	9/23/18	Completed
Krausz USA, Inc	Manufacturing	Data Entry Clerk	1	\$10.80	7/2/18	9/23/18	Completed
A Better U Healthcare	Healthcare	Administrative Assistant	1	\$9.90	1/7/2019	3/10/2019	Completed
Memes Care at Home	Healthcare	Medical Secretary	1	\$9.90	1/14/2019	1/18/2019	Completed
Quad Nurse, LLC	Healthcare	Administrative Assistant	1	\$8.46	2/11/2019	5/5/2019	Completed
Closetmaid	Manufacturing	HR Assistant	1	\$13.50	3/4/2019	5/24/2019	Completed
Stevenson Dental	Manufacturing	Dental Lab Technician	1	\$9.45	3/11/2019	5/30/2019	Completed
MCBOCC	Other	Circulation Assistant	1	\$8.47	5/23/2019	5/31/2019	Completed

Apprenticeship Agreements PY2018

Carry Forward from PY 17/18	0	Number Served	
New for PY 18/19	0	Amount Spent	

Business	Industry	Outcome Certification	Total Trained	Employer Contribution	CareerSource Reimbursement	Contract #	Begin	End Date	Status
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Internship Agreements PY2018

Carry Forward from PY 17/18	2	Number Served	8
New for PY 18/19	6	Amount Spent	\$22,428.90

Business	Industry	Position	Total Trained	Wage	Begin	End Date	Status
ITonDemand/eResources	IT	Support Desk Technician	1	\$13.50	4/23/18	7/15/18	Completed
Fidelity Manufacturing	Manufacturing	Mechanical Drafter	1	\$10.80	5/3/2018	7/25/2018	Completed
Front Street Property Management	Other	Marketing Assistant	1	\$13.50	8/20/2018	11/11/2018	Completed
Front Street Property Management	Other	Broker Assistant	1	\$13.50	9/4/2018	10/28/2018	Completed
SPX FLOW, Inc.	Manufacturing	HR Assistant	1	\$16.20	1/23/2019	4/16/2019	Completed
Hospice of Marion County	IT	Report Writer	1	\$14.40	5/13/2019	8/2/2019	In Process
USA4Sale	IT	Web developer assistant	1	\$15.14	6/3/2019	8/25/2019	In Process
T. Michel Productions	IT	Jr. Software Developer	1	\$19.80	6/3/2019	8/25/2019	In Process

Term	Definition
CBT	Custom Business Training
DW	Dislocated Worker (funding stream for WIOA)
Entered Employment Rate	The number of individuals exiting the system with employment divided by the total number of exiters.
LWIA	Local Workforce Investment Area
MMR	Monthly Management Report - produced by the State for the local areas
OJT	On the Job Training
RA	Reemployment Assistance (used to be Unemployment Compensation)
REA	Reemployment Assistance Act
Spidered Job Order	Job Orders pulled into the system from outside sources
WE	Work Experience
WIOA	Workforce Innovation and Opportunity Act (Training Program)
WP	Wagner Peyser Act (Universal Jobseeker Program)
WT	Welfare Transition Program

PERFORMANCE MEASURES

PY 2018/2019

Numbers current as of 5/31/2019

Performance Measure	Performance PY2016	Performance PY2017	Previous Month Performance April 2019	Current Month Performance May 2019	Performance YTD PY2018/2019	Previous Month Ranking	State Ranking YTD PY2018/2019
WP Entered Employment Rate	40.10%	37.00%	42.50%	43.90%	42.80%	7	8
WIOA AD/DW Entered Employment Rate	96.00%	97.30%	100.00%	100.00%	100.00%	1	1
WTP Entered Employment Rate	30.20%	35.40%	36.70%	50.00%	33.30%	12	11
All Family Partic. Rate	30.70%	35.60%	36.60%	35.90%	37.40%	8	8
2-Parent Partic. Rate	34.00%	46.20%	66.70%	100.00%	53.30%	6	6
			Previously Reported Quarter	Current Reported Quarter			
IEP/ISS/IRP Quality Pass Rate	93.30%	93.30%	80.00%	100.00%	93.30%	n/a	n/a
Case Note Quality Pass Rate	99.30%	99.30%	100.00%	100.00%	99.30%	n/a	n/a

MMR:
Run Date: June 2019

Based on Local Monitoring
Case Notes & IEP/ISS: PY2018



CITRUS COUNTY

SERVICES: APR-JUN 2019

UNEMPLOYMENT DATA

	MAY 2019	APR 2019
CITRUS	4.6% (2,222)*	4.3% (2,073)
FLORIDA	3.1%	2.9%
US	3.4%	3.3%

Not seasonally adjusted

AVERAGE ANNUAL WAGE

	2018	2017
CITRUS	\$37,289	\$36,520
FLORIDA	\$50,090	\$48,452

CANDIDATE SERVICES

- Online Job Listings and Referrals
- Computers and Office Equipment (Copiers, Fax and Telephones)
- Resume Writing Assistance
- Networking Events and Job Fairs
- Employability Workshops
- Career Counseling

BUSINESS SERVICES

- Recruitment Assistance
- Targeted Industry Talent Marketplaces
- Outplacement Services
- Training Grants
- Labor Market Data
- Financial Incentives

TOTAL RECEIVING SERVICES	CENTER TRAFFIC
941	1,794
VETERANS SERVED	TRAINING PROVIDED
70	79
BUSINESSES SERVED	WELFARE TO WORK TRANSITION
111	76
POSITIONS POSTED	TOTAL PLACEMENTS
527	55
	Average Placement Wage: \$11.05

Your Employment Solution Starts Here

CareerSource Citrus Levy Marion brings together business and community partners, economic development leaders and educational providers to connect employers with qualified, skilled talent and candidates with employment and career development opportunities. **Contact us at 1.800.434.5627.**

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LEVY COUNTY

SERVICES: APR-JUN 2019

UNEMPLOYMENT DATA

	MAY 2019	APR 2019
LEVY	3.6% (608)*	3.4% (579)
FLORIDA	3.1%	2.9%
US	3.4%	3.3%

Not seasonally adjusted

AVERAGE ANNUAL WAGE

	2018	2017
LEVY	\$32,671	\$31,512
FLORIDA	\$50,090	\$48,452

CANDIDATE SERVICES

- Online Job Listings and Referrals
- Computers and Office Equipment (Copiers, Fax and Telephones)
- Resume Writing Assistance
- Networking Events and Job Fairs
- Employability Workshops
- Career Counseling

BUSINESS SERVICES

- Recruitment Assistance
- Targeted Industry Talent Marketplaces
- Outplacement Services
- Training Grants
- Labor Market Data
- Financial Incentives

TOTAL RECEIVING SERVICES

301

CENTER TRAFFIC

954

VETERANS SERVED

15

TRAINING PROVIDED

11

BUSINESSES SERVED

36

WELFARE TO WORK TRANSITION

33

POSITIONS POSTED

384

TOTAL PLACEMENTS

38

Average Placement Wage: \$9.73

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MARION COUNTY

SERVICES: APR-JUN 2019

UNEMPLOYMENT DATA

	MAY 2019	APR 2019
Marion	3.7% (5,070)*	3.5% (4,798)
FLORIDA	3.1%	2.9%
US	3.4%	3.3%

Not seasonally adjusted

AVERAGE ANNUAL WAGE

	2018	2017
Marion	\$38,267	\$37,233
Florida	\$50,090	\$48,452

CANDIDATE SERVICES

- Online Job Listings and Referrals
- Computers and Office Equipment (Copiers, Fax and Telephones)
- Resume Writing Assistance
- Networking Events and Job Fairs
- Employability Workshops
- Career Counseling

BUSINESS SERVICES

- Recruitment Assistance
- Targeted Industry Talent Marketplaces
- Outplacement Services
- Training Grants
- Labor Market Data
- Financial Incentives

TOTAL RECEIVING SERVICES	CENTER TRAFFIC
2,925	6,284
VETERANS SERVED	TRAINING PROVIDED
210	240
BUSINESSES SERVED	WELFARE TO WORK TRANSITION
342	307
POSITIONS POSTED	TOTAL PLACEMENTS
2,699	440
	Average Placement Wage: \$12.94

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MOBILE RESOURCE UNIT 1

SERVICES: APR-JUN 2019

MOBILE RESOURCES

Our largest Mobile Resource Unit, MOBY1, will bring job search and business services right to your door. Fully equipped and staff supported. No charge for services!

Please visit

www.careersourceclm.com

for upcoming schedules and events.

JOB CANDIDATE AND BUSINESS SERVICES

- Business Hiring Events/Job Fairs
- Onsite Workshops/Training
 - Job Seeker Support
- Outplacement Services
- Job Seeker Self Services/Staff Assisted Services
- Career Research & Counseling

SERVICES RENDERED

	REACT	Job Search Support	Hiring Event	Other	Total Served
CITRUS	0	25	0	0	25
MARION	0	110	58	13	181
LEVY	0	3	0	0	3
TOTAL	0	138	58	13	209

Your Employment Solution Starts Here

The 40-foot MRU-1 is equipped with 10 computer workstations, internet access and office equipment to assist both businesses and candidates.

Each month, MRU-1 visits numerous public library branches and community centers in Citrus and Marion Counties as well as the Ocala campus of the College of Central Florida.

Contact us at 1.800.434.5627.



MOBILE RESOURCE UNIT 2

SERVICES: APR-JUN 2019

SCHEDULE

Location	Date/Time	Place
Bronson	F 10:30-3 PM	Bronson Library
Inglis	2 nd /4 TH W 10-3 PM	Town Hall
Williston	TH 10-3 PM	Williston Library

JOB CANDIDATE SERVICES

- Online Job Listings & Referrals
- Registration with the Employ Florida Marketplace
- Computers, Printers, Faxes & Copiers
 - Resume Writing Assistance
 - Career & Wage Information
 - Career Research & Counseling

SERVICES RENDERED

	REACT	Job Search Support	Hiring Event	Other	Total Served
CITRUS	0	0	0	0	0
LEVY	0	56	0	0	56
MARION	0	0	0	0	0
TOTAL	0	56	0	0	56

Your Employment Solution Starts Here

Our 22-foot MRU-2 provides four computer work stations and also has internet access and office equipment available. It visits locations in Levy and Marion Counties.

Please visit the Events calendar at www.careersourceclm.com for upcoming schedules and events.



CITRUS COUNTY

SERVICES: JUL 2018-JUN 2019

UNEMPLOYMENT DATA

	MAY 2019	APR 2019
CITRUS	4.6% (2,222)*	4.3% (2,073)
FLORIDA	3.1%	2.9%
US	3.4%	3.3%

Not seasonally adjusted

AVERAGE ANNUAL WAGE

	2018	2017
CITRUS	\$37,289	\$36,520
FLORIDA	\$50,090	\$48,452

CANDIDATE SERVICES

- Online Job Listings and Referrals
- Computers and Office Equipment (Copiers, Fax and Telephones)
- Resume Writing Assistance
- Networking Events and Job Fairs
- Employability Workshops
- Career Counseling

BUSINESS SERVICES

- Recruitment Assistance
- Targeted Industry Talent Marketplaces
- Outplacement Services
- Training Grants
- Labor Market Data
- Financial Incentives

TOTAL RECEIVING SERVICES	CENTER TRAFFIC
2,932	6,392
VETERANS SERVED	TRAINING PROVIDED
185	134
BUSINESSES SERVED	WELFARE TO WORK TRANSITION
215	272
POSITIONS POSTED	TOTAL PLACEMENTS
1,177	284
	Average Placement Wage: \$12.06

Your Employment Solution Starts Here

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LEVY COUNTY

SERVICES: JUL 2018 – JUN 2019

UNEMPLOYMENT DATA

	MAY 2019	APR 2019
LEVY	3.6% (608)*	3.4% (579)
FLORIDA	3.1%	2.9%
US	3.4%	3.3%

Not seasonally adjusted

AVERAGE ANNUAL WAGE

	2018	2017
LEVY	\$32,671	\$31,512
FLORIDA	\$50,090	\$48,452

CANDIDATE SERVICES

- Online Job Listings and Referrals
- Computers and Office Equipment (Copiers, Fax and Telephones)
- Resume Writing Assistance
- Networking Events and Job Fairs
- Employability Workshops
- Career Counseling

BUSINESS SERVICES

- Recruitment Assistance
- Targeted Industry Talent Marketplaces
- Outplacement Services
- Training Grants
- Labor Market Data
- Financial Incentives

TOTAL RECEIVING SERVICES	CENTER TRAFFIC
941	4,136
VETERANS SERVED	TRAINING PROVIDED
44	26
BUSINESSES SERVED	WELFARE TO WORK TRANSITION
74	108
POSITIONS POSTED	TOTAL PLACEMENTS
584	148
	Average Placement Wage: \$11.33

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MARION COUNTY

SERVICES: JUL 2018 – JUL 2019

UNEMPLOYMENT DATA

	MAY 2019	APR 2019
Marion	3.7% (5,070)*	3.5% (4,798)
FLORIDA	3.1%	2.9%
US	3.4%	3.3%

Not seasonally adjusted

AVERAGE ANNUAL WAGE

	2018	2017
Marion	\$38,267	\$37,233
Florida	\$50,090	\$48,452

CANDIDATE SERVICES

- Online Job Listings and Referrals
- Computers and Office Equipment (Copiers, Fax and Telephones)
- Resume Writing Assistance
- Networking Events and Job Fairs
- Employability Workshops
- Career Counseling

BUSINESS SERVICES

- Recruitment Assistance
- Targeted Industry Talent Marketplaces
- Outplacement Services
- Training Grants
- Labor Market Data
- Financial Incentives

TOTAL RECEIVING SERVICES

8,933

CENTER TRAFFIC

24,798

VETERANS SERVED

676

TRAINING PROVIDED

542

BUSINESSES SERVED

626

WELFARE TO WORK TRANSITION

902

POSITIONS POSTED

6,694

TOTAL PLACEMENTS

1,961

Average Placement Wage: \$12.23

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MOBILE RESOURCE UNIT 1

SERVICES: PY2018 - 2019

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- Business Hiring Events/Job Fairs
- Onsite Workshops/Training
 - Job Seeker Support
- Outplacement Services
- Job Seeker Self Services/Staff Assisted Services
- Career Research & Counseling

SERVICES RENDERED

	REACT	Job Search Support	Hiring Event	Other	Total Served
CITRUS	0	74	0	0	74
MARION	116	288	129	54	587
LEVY	0	3	0	0	3
Hurricane Michael Relief	0	0	0	478	478
TOTAL	116	365	129	532	1,142

Your Employment Solution Starts Here

The 40-foot MRU-1 is equipped with 10 computer workstations, internet access and office equipment to assist both businesses and candidates.

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MOBILE RESOURCE UNIT 2

SERVICES: PY2018 - 2019

SCHEDULE

Location	Date/Time	Place
Bronson	F 10:30-3 PM	Bronson Library
Inglis	2 nd /4 TH W 10-3 PM	Town Hall
Williston	TH 10-3 PM	Williston Library

JOB CANDIDATE SERVICES

- Online Job Listings & Referrals
- Registration with the Employ Florida Marketplace
- Computers, Printers, Faxes & Copiers
 - Resume Writing Assistance
 - Career & Wage Information
 - Career Research & Counseling

SERVICES RENDERED

	REACT	Job Search Support	Hiring Event	Other	Total Served
CITRUS	0	0	0	0	0
LEVY	0	215	0	0	215
Hurricane Michael Relief	0	0	0	390	390
TOTAL	0	215	0	390	605

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Measures	PY2017-2018 4th Quarter Performance	PY 2017-2018 % of Performance Goal Met For Q4	PY 2017-2018 Performance Goals	PY2018-2019 1st Quarter Performance	PY 2018-2019 % of Performance Goal Met For Q1	PY2018-2019 2nd Quarter Performance	PY 2018-2019 % of Performance Goal Met For Q2	PY2018-2019 3rd Quarter Performance	PY 2018-2019 % of Performance Goal Met For Q3	PY 2018-2019 Performance Goals
Adults:										
Employed 2nd Qtr After Exit	90.70	101.91	89.00	90.40	106.35	91.80	108.00	94.90	111.65	85.00
Median Wage 2nd Quarter After Exit	\$6,361	81.03	\$7,850	\$8,090	118.10	\$7,782	113.61	\$7,655	111.75	\$6,850
Employed 4th Qtr After Exit	90.50	106.47	85.00	88.70	108.17	85.60	104.39	89.80	109.51	82.00
Credential Attainment Rate				88.70	104.35	89.10	104.82	91.40	107.53	85.00
Dislocated Workers:										
Employed 2nd Qtr After Exit	88.90	107.11	83.00	100.00	120.48	100.00	120.48	100.00	120.48	83.00
Median Wage 2nd Quarter After Exit	\$12,124	176.99	\$6,850	\$11,339	165.53	\$12,569	183.49	\$12,233	178.58	\$6,850
Employed 4th Qtr After Exit	83.30	105.44	79.00	85.70	114.27	88.90	118.53	100.00	133.33	75.00
Credential Attainment Rate				100.00	133.33	100.00	133.33	100.00	133.33	75.00
Youth:										
Employed 2nd Qtr After Exit	83.50	109.87	76.00	87.00	116.00	85.40	113.87	85.50	114.00	75.00
Employed 4th Qtr After Exit	68.40	99.13	69.00	65.90	95.51	71.40	103.48	70.10	101.59	69.00
Credential Attainment Rate				92.80	109.18	93.90	110.47	98.50	115.88	85.00
Wagner Peyser:										
Employed 2nd Qtr After Exit	68.90	107.66	64.00	66.70	107.58	66.70	107.58	67.20	108.39	62.00
Median Wage 2nd Quarter After Exit	\$4,890	100.82	\$4,850	\$4,841	99.81	\$4,902	101.07	\$4,997	103.03	\$4,850
Employed 4th Qtr After Exit	68.70	104.09	66.00	69.00	107.81	67.60	105.63	66.30	103.59	64.00

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



CITRUS COUNTY

Comparison: PY2017/PY2018

TOTAL RECEIVING SERVICES	CENTER TRAFFIC
<u>PY2018: 2,932</u> PY2017: 3,955	<u>6,392</u> 6,278
VETERANS SERVED	TRAINING PROVIDED
<u>185</u> 242	<u>134</u> 101
EMPLOYERS SERVED	WELFARE TO WORK TRANSITION
<u>215</u> 283	<u>272</u> 311
POSITIONS POSTED	TOTAL PLACEMENTS
<u>1,177</u> 1,203	<u>284</u> (Avg Wage: \$12.06/hr) 616 (Avg Wage: \$11.88/hr)

Your Employment Solution Starts Here

CareerSource Citrus Levy Marion brings together business and community partners, economic development leaders and educational providers to connect employers with qualified, skilled talent and job seekers with employment and career development opportunities. **Contact us at 1.800.434.5627.**

CareerSource Citrus Levy Marion is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers listed above may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711. If you need accommodations, please call 1 800 434-5627, ext. 7878 or e-mail accommodations@careersourceclm.com. Please make request at least three business days in advance. CareerSource Florida Member.

Comparison: PY2017/PY2018

TOTAL RECEIVING SERVICES	CENTER TRAFFIC
<u>PY2018: 941</u> PY2017: 1,206	<u>4,136</u> 4,085
VETERANS SERVED	TRAINING PROVIDED
<u>44</u> 60	<u>26</u> 24
EMPLOYERS SERVED	WELFARE TO WORK TRANSITION
<u>74</u> 77	<u>108</u> 136
POSITIONS POSTED	TOTAL PLACEMENTS
<u>584</u> 673	<u>148</u> (Avg Wage: \$11.33/hr) 261 (Avg Wage: \$11.13/hr)

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MARION COUNTY

Comparison: PY2017/PY2018

TOTAL RECEIVING SERVICES	CENTER TRAFFIC
<u>PY2018: 8,933</u> PY2017: 12,705	<u>24,798</u> 30,119
VETERANS SERVED	TRAINING PROVIDED
<u>676</u> 810	<u>542</u> 476
EMPLOYERS SERVED	WELFARE TO WORK TRANSITION
<u>626</u> 705	<u>902</u> 942
POSITIONS POSTED	TOTAL PLACEMENTS
<u>6,694</u> 5,145	<u>1,961</u> (Avg Wage: \$12.23/hr) 3,048(Avg Wage: \$11.27/hr)

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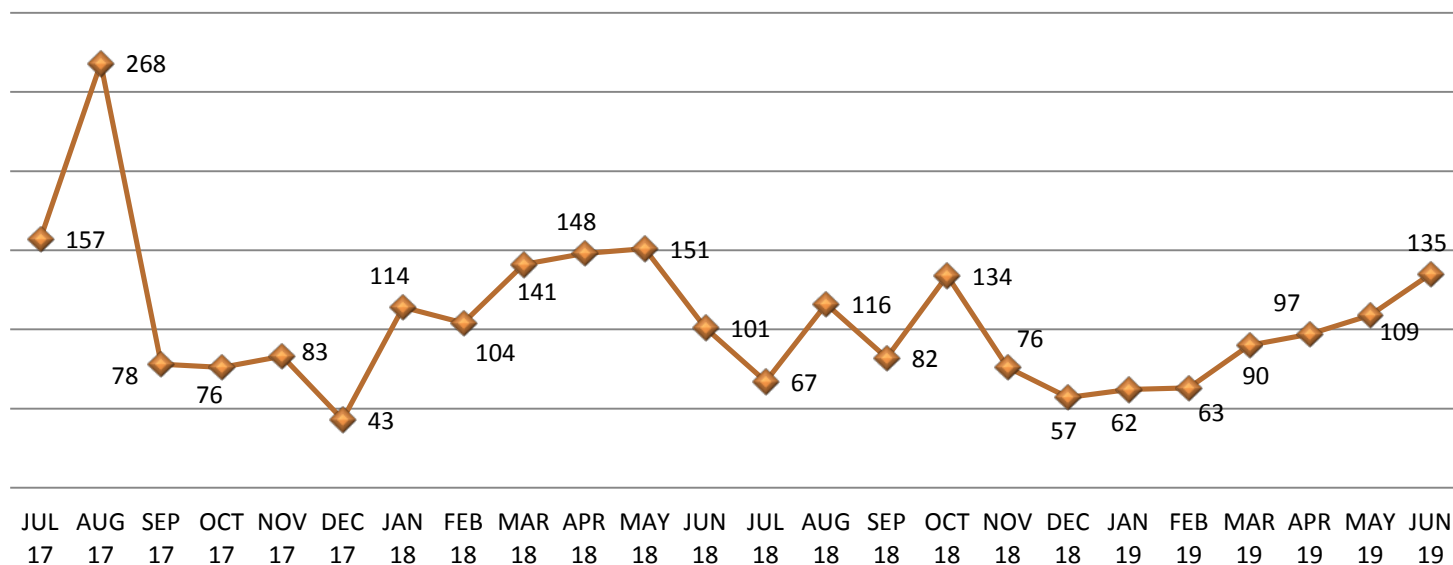
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Comparison: PY2017/PY2018

CENTER TRAFFIC	INTERNSHIPS/OJT's
<u>PY2018: 1,088</u> PY2017: 1,464	<u>6</u> 11
JOB REFERRALS	PLACEMENTS
<u>323</u> 280	<u>98 (Avg Wage: \$17.38)</u> 64 (Avg Wage: \$14.17/hr)

CENTER TRAFFIC BY MONTH



Professional Recruitment Services

Are you a recent graduate focused on growing your career? Are you a professional interested in advancement of a career change? If so, it's time to refocus and reconnect with the work place. Talent Center provides professional-level career coaching and recruiting to connect businesses and professionals. **Contact us at 1.844.364.9859.**



June 2019

Business Services Events (Onsite & Offsite)



June 2019

Total # of Events: 7
Total # of Attendees: 150
Total # of Positions: 49
Reported Hires: 60

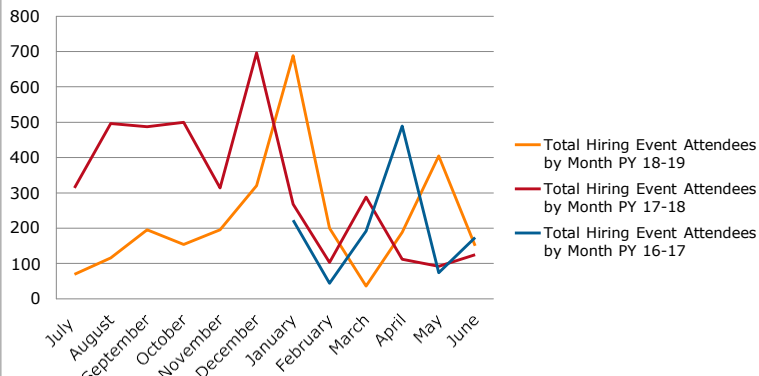
PY18-19 To Date

Total Events: 128
Attendees: 2,717
Reported Hires: 675

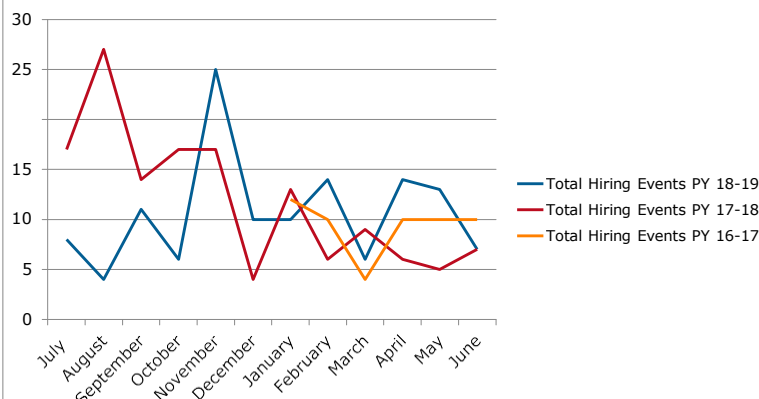
2019 Youth Job Fair

Attendees: 375
Businesses: 34

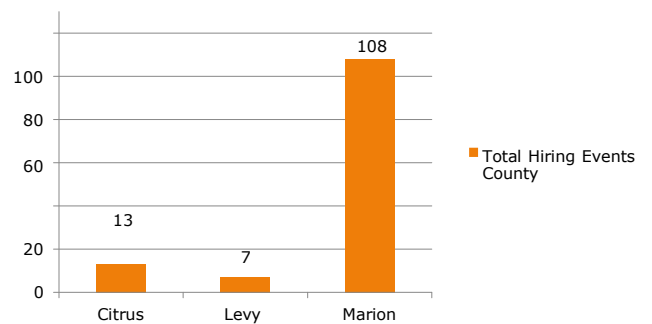
Total Hiring Event Attendees By Month



Total Hiring Events By Month



Hiring Events by County PY18-19



Other Recruitment Events 06/01/2019 - 06/31/2019

Event Date	Event Name	Target Audience	Event Location	County
6/20/2019	Energy Academy - Eckerd	HS 9th - 12 Grades	CF - Hampton Center	Marion
6/21/2019	Real Truck	General Public	Real Truck Facility	Marion



eNPS Survey Report



Region 10 June 2019

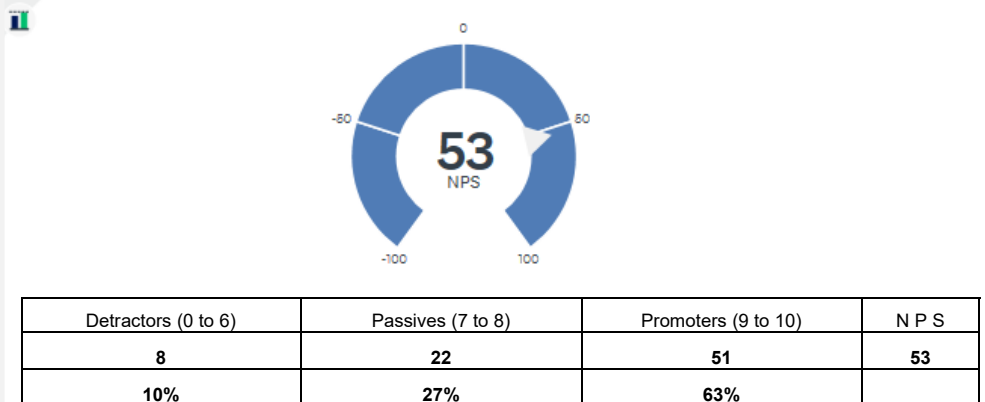
Combined—Final Report 6/12/2019

eNPS Score

2019 Overall eNPS

How likely is it that you would recommend employment at CareerSource CLM to a friend or colleague?

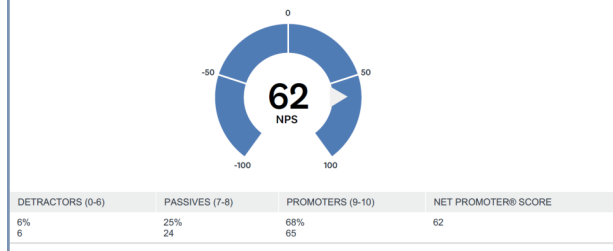
Answered: 70 Skipped: 0



2018 Overall eNPS

Q1 How likely is it that you would recommend employment at CareerSource CLM to a friend or colleague?

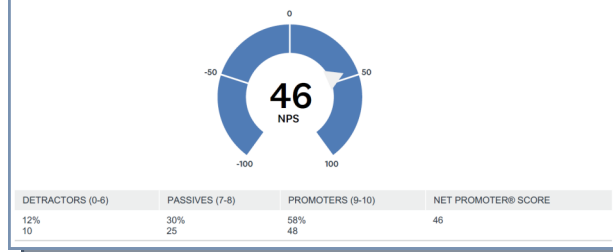
Answered: 95 Skipped: 0



2017 Overall eNPS

Q1 How likely is it that you would recommend employment at CareerSource CLM to a friend or colleague?

Answered: 83 Skipped: 0



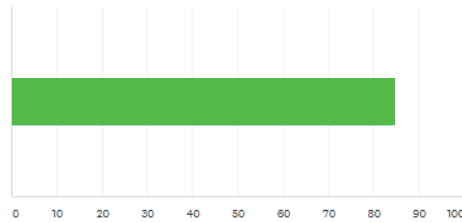
Comment: Promoters are down 5% - Detractors are up 4%

Slider Score

2019 Overall Slider Score

Overall, how satisfied or dissatisfied are you with your employment at CareerSource CLM? Use the Slider to select a number between 0 and 100.

Answered: 70 Skipped: 0



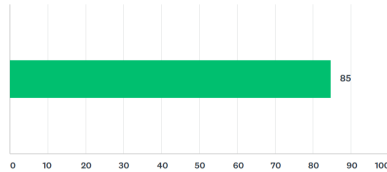
85

ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
Responses	84	5,905	70
Total Respondents: 70			

2018 Slider Score

Q3 Overall, how satisfied or dissatisfied are you with your employment at CareerSource CLM? Use the Slider to select a number between 0 and 100.

Answered: 95 Skipped: 0



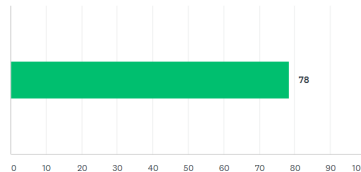
85

ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	85	8,059	95
Total Respondents: 95			

2017 Slider Score

Overall, how satisfied or dissatisfied are you with your employment at CareerSource CLM? Use the Slider to select a number between 0 and 100.

Answered: 83 Skipped: 0



78

ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
Responses	78	6,514	83
Total Respondents: 83			

Comment: Parity

“Why” Comments

Q2 Why did you provide the rating you did? Please be as specific and detailed as possible in your answer...

Aligned eNPS score is noted in red...Customer Satisfaction—“Slider Score” is in blue...

8	Friendly atmosphere. Team members always willing to jump in and assist. Benefits are amazing.	100
8	Great working conditions and team mates. The mission is really good for the community.	70
5	Work load isn't fair. Some departments have minimal duties to none at times where others work constantly - in this wages should reflect the workload. In serious conversations all should address others, from coworkers to management, in a positive respectful manner in a professional tone. If a reply isn't in that manner maybe it shouldn't be said. I respect others but there are times I've spoken out/up when cornered. I feel that should "NOT" have been measures I had to take – at that moment I felt I had no other recourse. There are positives working here, this is of highest importance to me, the Center Manager is fair. If you are wrong she'll let you know respectfully, but she's approachable, fair and professional. Sometimes negative comments are made from those who smile in her face and other wise when she isn't present; this shouldn't be it lessens the morale in the workplace. If it isn't positive and/or productive "Keep it to yourself".	50
10	World class leadership	100
4	The benefits are great but there are a lot of systemic issues.	20
8	I think it is a great career - love helping folks, but feel we are being short sided and need to be updated to current workforce needs. We are still old school on benefits and flexibility.	92
10	Good place to work, fair, competitive salary, decent benefits.	61
8	At times, it seems that staff are too focused on their goals and miss out on helping individuals that are not going to add any value to their goals.	90
8	Good place to work	51
10	I enjoy what I do very much along with the people on my team and the organization.	100
9	Career Source has come along way over the years, it's name is starting to over come the negativity that was attached for many years	90

Why” Comments

10	CareerSource is an excellent place to work! I appreciate that most of the employees truly care about the candidates.	100
10	There's no other place where they can find that everyone is so helpful and passionate in what they do.	85
10	Because of the work we do, working here is extremely gratifying. I also believe from the top down the organization genuinely cares about staff.	95
6	Change is an important part of any organization, but change of cubicles, areas, departments, job descriptions on an annual basis shows inconsistency and promotes disorganization.	46
10	Excellent working environment and benefits	100
9	Good benefits, if you like to help others, this is the place to be	86
9	CareerSourceCLM affords excellent opportunities for individuals particularly interested in human services and/or human resources.	93
10	Services provide to customer is excellent!	98
6	Benefits are good but a little high for a family - basically working for Insurance	70
10	Great environment and focused mission.	99
10	CLM provides great working environment and great benefits	100
10	Co-workers support each other and management treats everyone very well.	100
10	Everyone in this office gets along well with each other. We all help where we are needed.	100
10	CareerSource CLM is a great organization, has great benefits, and provides a career that allows you to make a difference in someone's life and the community.	90
7	Prefer not to go into details.	71
10	CSCLM treats their employees very well; very competitive salary and benefits for the area; great working environment.	97
10	1) The organization's mission and vision - it is important to me to give back and work toward the greater good. 2) Our leadership team is topnotch with years of dedicated service and institutional knowledge, plus they believe in what we do and believe in/support/champion our team. And 3) I don't think I've ever worked with a better staff, everyone I've encountered goes the extra mile, is professional, generally pleasant, and appears genuinely committed to the cause. By and large, the CSCLM team is passionate about what they do, compassionate and competent!	95

“Why” Comments

10	Excellent benefits, team environment. I would only recommend someone who had a desire to work in this field, however.	100
9	Good management and great coworkers.	90
10	One of the reasons that I love working at CareerSource is because it gives me an opportunity to help people. The other reason is that I love the staff. There's nothing like a friendly work environment!	100
10	After 6 years of employment I can honestly say I love it here. I have found my niche for the remaining years of my employment life I believe. Career Source offers a tight family environment which offers many opportunities for individuals willing and able to grow with the ever changing labor market. Kathleen Woodring is one of the warmest and most compassionate people I have ever met professionally. She inspires me to do a good job for her, and Brenda Chrisman supports me in ways that make me want to stay with the company for many years to come. Thank you Kathleen and Brenda for your encouragement over the years. Rusty Skinner is super smart and I feel has a compassionate heart that truly sees the vision of helping people overcome their employment hurdles. I think what he and the rest of HR do to make this machine run properly is mind-boggling and I am totally impressed. The issues that have arisen in my opinion have been addressed appropriately by Ilianette Hernandez, who I respect and admire professionally and personally. Through collaboration I can more effectively manage conflict and my position and future transition have become much more tolerable and exciting. I think the companies forward thinking in incorporating 180 Skills Conflict Resolution training as a alternative to dismissal is brilliant. It gives us the opportunity to heal our work family relationships rather than end them. All in all I feel blessed God has given me the opportunity to work with Career Source now and hopefully for many more years to come.	100
10	Great place to work, very organized and efficient.	95
9	It is a great work environment with excellent benefits.	90
7	It's an okay place at times.	80
10	It is a great organization with strong values and opportunities of growth.	90

“Why” Comments

8	It seems that at times staff are focused only on their individual goals and how it is going to benefit them directly instead of truly focusing on helping individuals attaining employment and working in desired filled or planning out steps of how to get there with an individual.	80
10	It is an awesome place to be a part of with tremendous support and growth opportunities.	100
8	I see problems in different areas with some people not stepping up and doing what they need to do and expecting others to do their work.	71
10	Great company to work for	100
10	Because Career Source CLM is a no profit organization, a friend, colleague or other person can take a benefic of that receiving help or assistant of the employs: Looking for a job, Apply for a job, Register on the Website Employ Florida, Complete the Career Source Plan to meet a Job Readiness Coach, Educational Assistant of WIOA program, Trainings, Workshops, Mock Interviews, Update a Resume. Using computer, fax, copy machines, Be oriented or guide to obtain their goals and a others services.	95
8	Overall it is a great place to work. The pros outweigh the cons.	50
6	The work overall can be a bit tedious and monotonous - not the right fit for just anyone. I also think that lends to a bit more negative chatter among employees which can be challenging to work within and around.	52
9	Did not give a perfect score because there is room for improvement.	92
8	good pay/time benefits.	95
8	The Hours are very convenient and most of the staff is both passionate and professional in their desire to assist our candidates.	90
10	Already have referred a friend.	90
10	It's a good feeling to know that you have helped someone in a positive manner, especially the way the world is today.	90
8	Too many changes and lack of communication	85
8	Good place to work. Good pay and benefits.	50
8	CareerSource is a rewarding place to work but one must be willing to put up with the politics.	70
8	CareerSource is a rewarding place to work but one must be willing to put up with the politics.	70
10	We have great services and labor market information to offer to others.	85

“Why” Comments

10	Very balanced employer. Senior management is well informed, kind and concerned with helping candidates, businesses and employees.	98
10	CareerSource Citrus Levy Marion is a really good organization that maintains a very open and accepting atmosphere. Employment here means being part of something with an important mission. Employees here are really good people. Continual training is provided and the management keeps everyone informed and engaged. This second part of this comment pertains to the next question, which does not provide a comment box. It is said that DEO does not provide its part-time temps with benefits such as health, holiday and sick leave. While this is quite often the case with part-time positions everywhere, when the State keeps people at a temporary status for long periods of time, one has to wonder if they are doing what is morally right. Balance Careers has this to say about providing no benefits to part-time employees: "Before the organization decides against offering part-time employee benefits, consider the impact of not offering them. Employee retention, productivity, and a more engaged workforce are all win-win situations for your company." OPS employees are no doubt satisfied overall with working for this wonderful organization and are happy to contribute their best effort to their jobs. It just seems like it would behoove the State of Florida to want to retain these dedicated employees and provide them a bit more incentive.	85
7	It's a good place to work.	60
10	It is an excellent company to work for.	100
10	Fabulous management team who values our candidates, employers and their employees. Our employees rock as well!	95
8	CareerSource CLM is a great place to work and with great benefits.	95
9	First up I never give 10's. Additionally, I feel working at CSCLM I'm valued and treated very well, not to mention from management down we have wonderful staff who are genuine and professional.	87
9	The job satisfaction is high, inter-office and intra-office interactions are more pleasant than the majority of other companies of 50+ staff, benefits are fairly good and communication to and from upper management is effective.	90

“Why” Comments

5	Most of my friends would not be interested in this type of work.	85
9	I already have recommended friends	91
9	Career Source is a wonderful organization. I feel blessed to be given an opportunity to work closely with such great people.	90
10	Excellent work environment, and benefits	100
10	Professional environment. Most are willing to help others improve. Family oriented environment. Great opportunity to help others.	80
5	For those that came from a for profit or military background, the lack of a cohesive training program for each position doesn't exist. There is no one to do on boarding for new employees which then requires multiple visits to complete your paperwork	48
9	I have generally found the work gratifying, colleagues congenial, management responsive, and pay appropriate.	90
7	Insurance rates not feasible for most families.	56
10	This is great place to work. We have a great mission and all staff strive to achieve the goals.	96
10	I like working at CareerSourceCLM.	90
10	I rated it as an 8 at this time, because there are times that I feel that the performance goals are stressful and unfair. I don't feel that one should be judged on performance measures for something that may be beyond their control.	50
10	Great service and knowledgeable	96
10	There is such a positive vibe at CareerSource. I enjoy the team spirit and togetherness. In addition, the rewards to give back to our community, empowering them with the resources and skills to make them successful is priceless.	100
10	CareerSource CLM has always provided wonderful services. When I first came here as a job seeker in 2014 I would have never thought that I would get an awesome opportunity to work with such great people. This has been the BEST job I have ever had!! CareerSource will always be the first that recommended for employment.	100

“Why” Comments

10	Career source is what it says a source to find a job or career. The center's resources and the people that work in there provide tools that allow you to reach for whatever career you are skilled for and are willing to take on. I have personally used CareerSource and realized that the resume skills and interview skills that I had were not as good as I thought. It has taken my resume writing and interview skills to the next level! Thank you!	100
10	I enjoy what I do and think they would too	90
10	The people	90
10	Received several complaints about participants feeling unwelcomed in the front when coming in.	90
10	An overall great environment to work in.	100
10	Many staff still treat job seekers as people who are coming to receive a type of charity. Many staff do not spend enough time looking to see what the candidate's "spark" is. Yes some job seekers have difficulties and live their lives differently but we are supposed to be the change agents.	61

NET PROMOTER

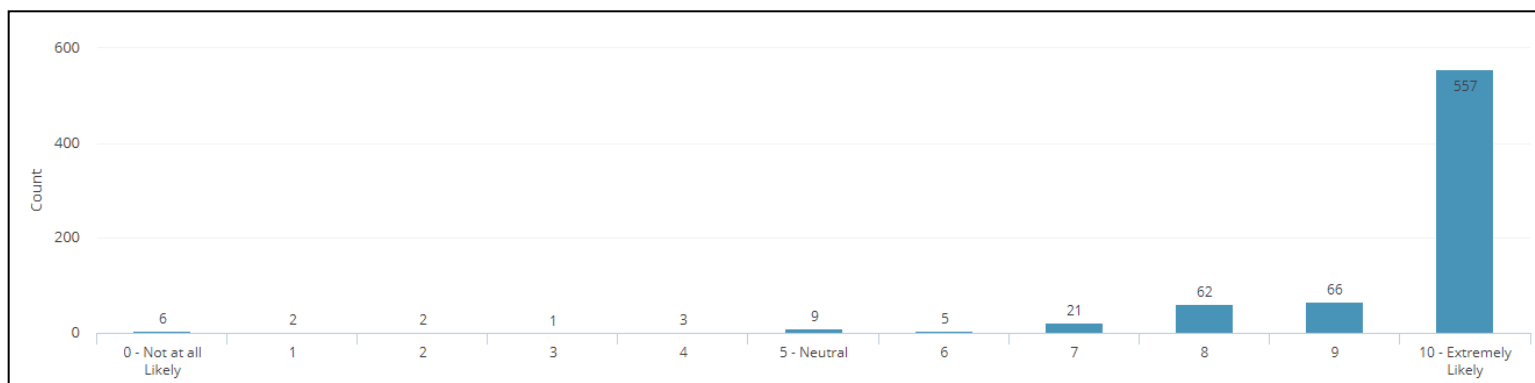
Transactional Net Promoter Cumulative Report Program Year 18 - 19

Candidate Report	Region 10 Net Promoter Score
Net Promoter Score–Area/Region	► +81

Some Context on the Score: This score is based on a survey taken approximately 1 to 4 weeks after the first service. Net Promoter scores range between -100 and +100. Based on global NPS standards, any score 0 to 49 would be considered “Good” – scores between 50 and 69 are “Excellent” and scores 70 and above are considered “World Class” or “Exceptional”. Simply put, any positive score means that you have more promoters (advocates willing to recommend you) than detractors (unhappy or dissatisfied customers).

	NPS	Distribution	Detractors	Passives	Promoters
734	81		4	11	85

Transactional Net Promoter Score Distribution By Rating



Transactional Net Promoter Score By Office

City		NPS	Distribution	Detractors	Passives	Promoters
Chiefland	50	76		6	12	82
Lecanto	175	83		3	11	86
Ocala	509	81		4	11	85

Transactional Net Promoter Word Cloud

helpful staff job great service friendly resume professional people always career knowledgeable information extremely good everyone time questions helped informative nice excellent get assistance search services source customer go helping needed well employment looking lot new way experience resources work computer need available can courteous many willing assist employees everything feel kind like made office one provided received will know letterman polite really also better computers ms person process amazing explained finding getting given much patient every got mr use working able center front just members needs prompt worked application attentive awesome debbie easy encouraging first gave jobs make

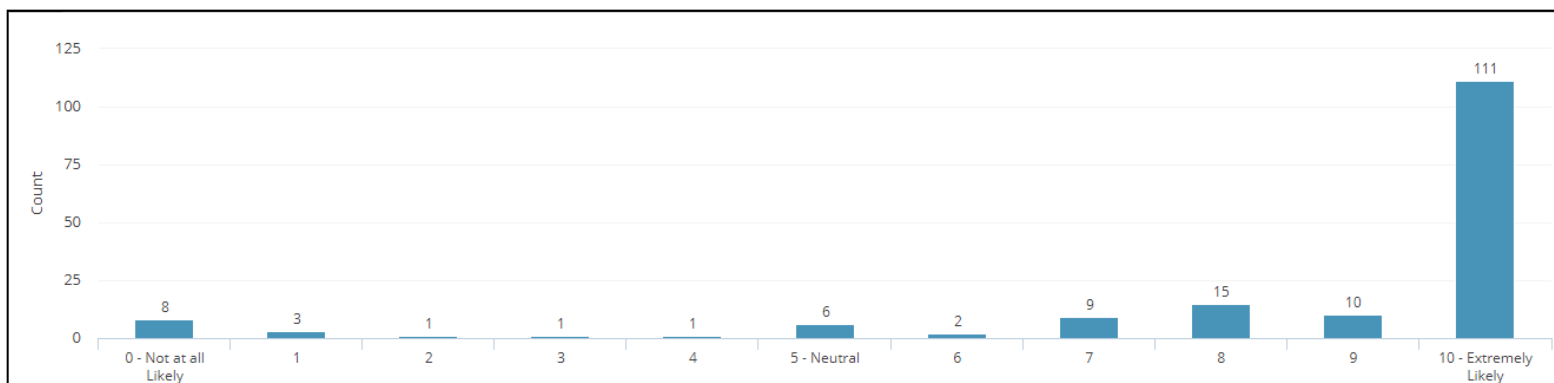
Relationship Net Promoter Cumulative Report Program Year 18 - 19

Candidate Report	Region 10 Net Promoter Score
Net Promoter Score—Area/Region	► +59

Some Context on the Score: This score is based on a survey taken approximately 6 months after the first service. Net Promoter scores range between -100 and +100. Based on global NPS standards, any score 0 to 49 would be considered “Good” – scores between 50 and 69 are “Excellent” and scores 70 and above are considered “World Class” or “Exceptional”. Simply put, any positive score means that you have more promoters (advocates willing to recommend you) than detractors (unhappy or dissatisfied customers).

	NPS	Distribution	Detractors	Passives	Promoters
167	59		13	14	72

Relationship Net Promoter Score Distribution By Rating



Relationship Net Promoter Score By Office

City		NPS	Distribution	Detractors	Passives	Promoters
Chiefland	18	44		17	22	61
Lecanto	36	61		11	17	72
Ocala	112	61		13	13	74

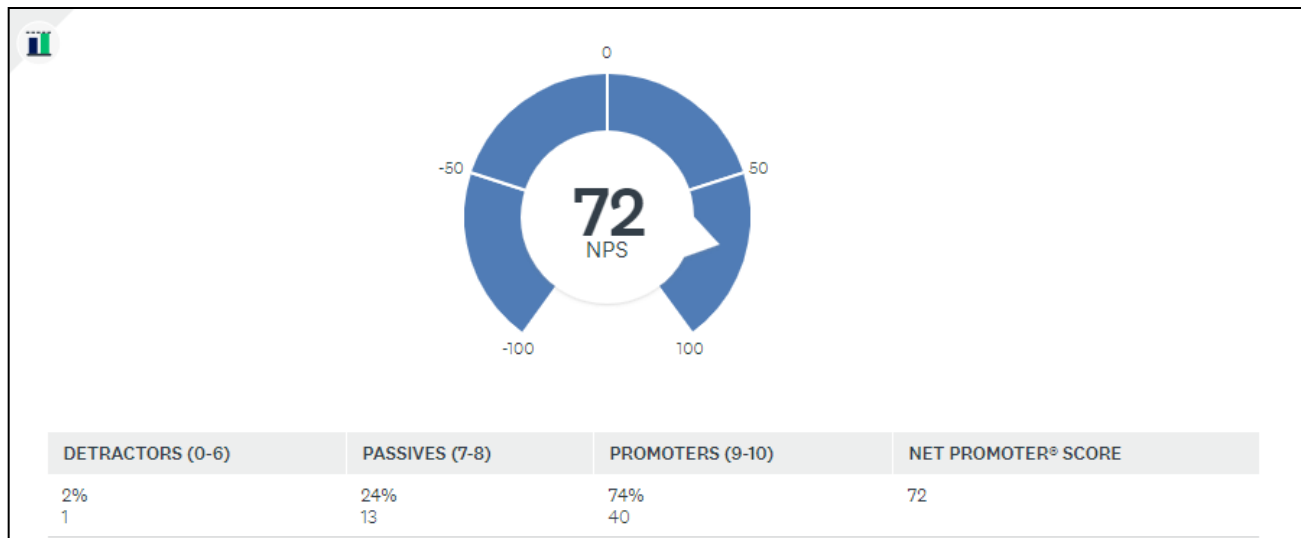
Relationship Net Promoter Word Cloud

helpful staff job service friendly great employment good people everyone find get helped career excellent knowledgeable work always experience need professional employees extremely helping office opportunities place resume source careersource cdm even informative needed provided resources resumes services still system apply available back better classes current finding florida getting given information interviews kept know like lot money much never new nice obtain one re received school time use useful willing

Talent Center Cumulative Report Program Year 18 - 19

Candidate Report	Talent Center Net Promoter Score 2018
Net Promoter Score	► +72

Some Context on the Score: This score is based on a survey taken approximately 1 to 4 weeks after the first service. Net Promoter scores range between -100 and +100. Based on global NPS standards, any score 0 to 49 would be considered “Good” – scores between 50 and 69 are “Excellent” and scores 70 and above are considered “World Class” or “Exceptional”. Simply put, any positive score means that you have more promoters (advocates willing to recommend you) than detractors (unhappy or dissatisfied customers).



How We Compare

During the recent state programmatic monitoring, Andy Windsor shared some interesting statistics related to how Region 10 compared to the state average in a number of key areas during PY 2018 - 2019. It's interesting and telling to compare ourselves with others and the state average. Please note that information below...

WP Applications

- Region 10 had **3,700** new Wagner Peyser Applications.
- The state had **183,000** new Wagner Peyser Applications.

Participation and Exit

- Overall the Region 10 average number of days between initial participation and exit for all participants was **56** days. **The state average was 87 days**
- Overall the Region 10 average number of days between initial participation and exit for a veteran was **64** days. **The state average was 79 days.**
- Overall the Region 10 average number of days between initial participation and exit for an RESEA participant was **33** days. **The state average was 44 days.**

Activities per Case

- Overall the Region 10 average activities entered in EF per case was **18**.
- The state average number of activities entered per case was **16**.

WP % Placed

- Overall the Region 10 average % of candidates placed was **11.5%**.
- The state average % of candidates placed was **11.7%**.

% of Referrals Resulting in Placement

- Overall the Region 10 - % of referrals resulting in Placement was **9.2%**.
- The state average % of referrals resulting in Placement was **9%**.

% of Cases Without Email (high percentages here might hint at impropriety)

- Overall the Region 10 - % of cases without email was **5.5%**.
- The state average % of cases without email was **10.5%**.

% of Cases With Phone # Anomalies (high percentages here might hint at impropriety)

- Overall the Region 10 - % of cases with phone anomalies was **1.3%**.
- The state average % of cases with phone anomalies was **4%**.

Performance Standard #1

Referral Quality Success Rate

What does this measure? This measures how successful regional staff members are at issuing quality referrals – and more specifically how successful they are as a whole in issuing job referrals that result in placement.



Performance Standard #1

Referral Quality Success Rate

Goal Considerations: Since implementation – the average regional **RQSR** stands at 12.71% (through 4/30/2019).

Needs Improvement – **0% to 11.9%**

Successful – **12% to 12.9%**

Exceptional – **13%+**

Performance Standard #2

Wagner Peyser Employed Second Quarter after Exit (Retention)



What does this measure? This measures how successful Region 10 is at creating and supporting candidates who have a job at exit and then who either retain that job or replace it if they lose it within the second quarter timeframe.

Performance Standard #2

Wagner Peyser Employed Second Quarter after Exit (Retention)

Goal Considerations: A mass of accessible (if not timely) data exists for this goal. Our DEO goal is 62%. We have been performing at 66% to 67% on this goal.

Needs Improvement – **0% to 57.9%**

Successful – **58% to 64.9%**

Exceptional – **65%+**



Performance Standards and Management Tools

Program Year 2019 – 2020

Our approach this year will be founded on 3 touchstone principals:

1. **Less is more** – Encourage performance using as few performance standards as possible
2. **Keep it simple** – Staff should be able to understand and see how their work contributes to regional goal achievement and performance.
3. **Actively use “Management Tools”** – As opposed to focusing on multiple performance standards - managers should receive an array of useful and timely information and then use it to support overall performance.

What’s the difference between a Performance Standard and a Management Tool?

Performance Standard – A performance standard is a quantifiable measure that is used to gauge performance over time. It is based on objective information and is used to encourage the achievement of organizational and/or individual performance goals. For our purposes, a performance standard outcome (rating) would contribute to a final rating score on the yearly individual performance appraisal.

Management Tool – A management tool is a metrics driven set of data and/or information which can be used by managers to measure individual and programmatic progress toward one or more goals. For our purposes, individual progress on various management tools would not be considered specifically during the individual performance appraisal. Rather they will be used by managers to enhance various and desired organizational outcomes.

Performance Standards

Cory and I agree that each of these is applicable, trackable and reportable. Additionally, the adoption of any of these performance standards fully support state established WIOA indicators.

Referral Quality Success Rate

- **What does this measure?** This measures how successful regional staff members are at issuing quality referrals – and more specifically how successful they are as a whole in issuing job referrals that result in placement.
- **How does this contribute to Region 10 performance?** Connecting qualified candidates to a business customer’s open and available job opportunities is our central mission. Encouraging performance on this is supports our WIOA indicators.

- **Do all staff members contribute to performance on this measure?** In the broadest sense – Yes. Most staff members now issue referrals. Those staff members who do not, still contribute by screening and referring for recruitment and placement services and/or by helping create qualified job candidates.
- **Does the goal have an “upside”?** Yes – this is not a new goal. It was implemented as an individual goal last year so staff members are widely familiar with it. There was some resistance to it as an individual goal at implementation but now, near the end of our program year 70% of staff members with this as a goal are meeting or exceeding it – some by large margins. Those staff members not meeting it are “all in the game” with improving scores. Overall this has been a successful individual goal that ties in nicely with our State imposed regional goals. The conversion of this to a team goal will wash away the remaining concerns.
- **Does the goal have a “downside”?** Yes – we do have some staff members who do not issue referrals. The resource room staff members largely make up this population. This leaves us with two approaches. **First** – we simply accept that they contribute by doing their current jobs – see the narrative above. I absolutely believe this is true. Or... **Secondly** – we could bring them into the game by empowering them – maybe even requiring them to issue referrals. Doing so would likely drive down regional team performance on this measure but that could be factored in when goal setting. *Open for full discussion.*
- **Goal Considerations:** Since implementation – the average regional **RQSR** stands at 12.71% (through 4/30/2019). If we are interested, Cory can calculate what performance has been historically to help us decide a performance matrix for goal setting.

Established Standard

Needs Improvement – **0% to 11.9%**
 Successful – **12% to 12.9%**
 Exceptional – **13%+**

Wagner Peyser Employed Second Quarter after Exit (Entered Employment)

- **What does this measure?** This measures how successful Region 10 is at creating and supporting candidates who have a job at exit and then who either retain that job or replace it if they lose it within the second quarter timeframe.
- **How does this contribute to Region 10 performance?** This is an actual WIOA goal! Providing services which enhance the hiring and retention odds for our candidates is an important responsibility of every staff member. Maximizing the number (and percentage) of participants who are working at exit and who then also retain employment is a long range support for our retention goals.
- **Do all staff members contribute to performance on this measure?** In the broadest sense – Yes. The services and assistance all staff provides enhance a candidate’s ability to find an original job and then another job if they lose the one they exit with.
- **Does the goal have an “upside”?** Yes – it directly supports a WIOA goal. This would be an easy goal for staff members to accept – once the linkage to retention is outlined.
- **Does the goal have a “downside”?** Yes – simply put - as a goal it is a little “removed” from the day to day work most of our staff members do. They focus on the here and now and feel less responsible for the longer term retention of a job. Also data is delayed and it will take some mathematical calisthenics to calculate. But staff won’t have to worry about that – they will simply see the end result %.
- **Goal Considerations:** A mass of accessible (if not timely) data exists for this goal. Cory would be integral in the setting of this goal.

Established Standard

Needs Improvement – 0% to 57.9%

Successful – 58% to 64.9%

Exceptional – 65%+

Management Tools

Business Services – Number of Single Employer Hiring Events Tracking of single employer hiring events.

- **Simple Definition:** Tracking of single employer hiring events
- **Purpose:** To ensure region 10 is providing the proper level of support to its business customers.
- **Focus:** Maintenance of or increase in attendance and/or the number of events.
- **Data Source:** Manual tracking by BDMs – could be supported by MIS reporting. The tracking mechanism is already in place. MIS could augment or replace through employer service entry tracking.
- **Who Tracks, Manages and Reports this tool?** Designated BDCs by sector
- **Positions:** Team - Applies to BDCs by sector
- **Target:** Based on PY 18 – 19 baseline

Business Services – Number of Job Fair Hiring Events Tracking of Job Fair events.

- **Simple Definition:** Tracking of Job Fair events
- **Purpose:** To ensure region 10 is providing the proper level of support to its business customers.
- **Focus:** Maintenance of or increase in business participation and/or the number of events
- **Data Source:** Manual tracking by BDMs – could be supported by MIS reporting. The tracking mechanism is already in place. MIS could augment or replace through employer service entry tracking.
- **Who Tracks, Manages and Reports this tool?** Designated BDMs
- **Positions:** Team - Applies to BDMs regionally
- **Target:** Based on PY 18 – 19 baseline

Business Services – Outreach through Presentations and Attendance at Events Tracking of outreach to businesses.

- **Simple Definition:** Tracking of outreach to businesses.
- **Purpose:** To help measure the impact and success of the “refocus” on outreach activities.
- **Focus:** Expanding the number and types of community events accessed for CSCLM marketing.
- **Data Source:** Manual tracking and reporting. The tracking mechanism is already in place. MIS could augment or replace through employer service entry tracking.
- **Who Tracks, Manages and Reports this tool?** Designated BDMs
- **Positions:** Individual - Applies to each BDM by sector and each Eckerd Workforce Development Specialist.
- **Target:** Five (5) per BDM/Specialist per quarter

Business Services – Recruitment of New Businesses Tracking of Business Services success at new business recruitment.

- **Simple Definition:** Tracking of Business Services success at new business recruitment.
- **Purpose:** To help measure the impact and success of the “refocus” on business recruitment activities.

- **Focus:** Expanding the number of new businesses listing job orders in Employ Florida (employer penetration).
- **Data Source:** MIS Reporting.
- **Who Tracks, Manages and Reports this tool?** The Program Development and Reporting Manager
- **Positions:** Individual - Applies to each BDM by sector and each Eckerd Workforce Development Specialist.
- **Target:** Based on PY 18 – 19 baseline

Business Services – Repeat Business Tracking of Business Services success at maintaining the business relationship.

- **Simple Definition:** Tracking of Business Services success at maintaining the business relationship.
- **Purpose:** This measures the number of businesses served during the current year that were served in the prior three (3) years.
- **Focus:** Ensuring that Business Services maintains established relationships.
- **Data Source:** MIS Reporting.
- **Who Tracks, Manages and Reports this tool?** The Program Development and Reporting Manager
- **Positions:** Team - Applies to everyone who works in Business Services.
- **Target:** 30%+ Reengagement

Talent Center – New “Pure” Akken Job Orders Tracking of success at increasing Akken job orders.

- **Simple Definition:** Tracking of success at increasing Akken job orders.
- **Purpose:** To help measure the impact and success of the “refocus” on business recruitment activities.
- **Focus:** Expanding the number of new Akken job orders.
- **Data Source:** Akken Reporting
- **Who Tracks, Manages and Reports this tool?** The Program Development and Reporting Manager
- **Positions:** Individual - Applies to TC BDM
- **Target:** 10 per quarter

Business Services – Survey Completion Tracking of business survey completion.

- **Purpose:** To help measure business services success at initiating surveys.
- **Focus:** Meet or exceed state survey goal requirements.
- **Data Source:** Salesforce Reporting.
- **Who Tracks, Manages and Reports this tool?** The Director of Continuous Improvement
- **Positions:** Team - Applies to BDMs and BDCs by sector
- **Target:** 867

Business Services – Percent of Job Orders Without Referrals Tracking of “orphan” job orders.

- **Simple Definition:** Tracking of “orphan” job orders.
- **Purpose:** To help measure the impact and success of the “refocus” on job order fill activities.
- **Focus:** Minimizing the number/percentage of Tier 2 and 3 orphan job orders.
- **Data Source:** MIS Reporting.
- **Who Tracks, Manages and Reports this tool?** The Program Development and Reporting Manager
- **Positions:** Team - Applies to BDMs, BDCs and Recruiters by sector
- **Target:** Trend line tracking for PY 19 - 20

Business Services – Business Video Marketing

- **Simple Definition:** Tracking of success in marketing business videos
- **Purpose:** To help measure the impact and success of the “refocus” on business outreach.
- **Focus:** Increase business access to and use of CSCLM no cost videos.
- **Data Source:** Manual Tracking
- **Who Tracks, Manages and Reports this tool?** Designated BDMs

- **Positions:** Individual - Applies to each BDM by sector (Appropriate for Eckerd?)
- **Target:** 1 per BDM per quarter

Monitoring - QA/QC Regular internal programmatic monitoring continues as a management tool.

- **Simple Definition:** Regular internal programmatic monitoring continues as a management tool.
- **Purpose:** To help region 10 maintain acceptable compliance with state and local policies and procedures.
- **Focus:** In the new PY the focus is on validity and correct documentation of Placements and Obtained Employments.
- **Data Source:** Manual case and job order reviews by Program Managers and Managers. Also an outside monitoring vendor will provide an alternate process.
- **Who Tracks, Manages and Reports this tool?** The Director of Continuous Improvement and the Administrative Manager and EO Officer
- **Positions:** Individual - Applies to all positions that enter candidate and business services into Employ Florida
- **Target:** 85% correct

Veterans Services – Case Management Tracks the percentage of SBE veterans who accept case management services.

- **Simple Definition:** Tracks the percentage of SBE veterans who accept case management services.
- **Purpose:** To help measure DVOP (and process) effectiveness at encouraging veteran completion of the case management process.
- **Focus:** Ensure that at least 51% of SBE veterans accept and comply with case management.
- **Data Source:** EF Reporting and DEO monitoring
- **Who Tracks, Manages and Reports this tool?** The Director of Continuous Improvement
- **Positions:** Individual - Applies to each DVOP
- **Target:** 51%+

Resource Room/WTP/SNAP – 180 Skills Referral Tracks the number of “qualified” candidates referred for 180 Skills screening by resource room staff.

- **Simple Definition:** Tracks the number of “qualified” candidates referred for 180 Skills screening by resource room staff.
- **Purpose:** To help measure the impact and success of the “refocus” on internal processes.
- **Focus:** Ensure that WP/Universal candidates are referred for 180 Skills utilization.
- **Data Source:** Manual Tracking
- **Who Tracks, Manages and Reports this tool?** Center Manager
- **Positions:** Office Team Goal – All Resource Room Staff
- **Target:** Trend line tracking for PY 19 - 20

Workshops – Workshop Attendance Tracks Workshop traffic/attendance.

- **Purpose:** To help measure workshop utilization.
- **Focus:** Ensure that workshops have an appropriate ROI.
- **Data Source:** Manual Tracking
- **Who Tracks, Manages and Reports this tool?** Workshop Coordinator
- **Positions:** Workshop Coordinator
- **Target:** 5% increase in traffic across all workshops

Ticket to Work – Payments Tracks the amount of Ticket to Work revenue produced.

- **Purpose:** To monitor the influx of unrestricted TTW dollars.
- **Focus:** Ensure that CSCLM maximizes the opportunity to secure available funds for our TTW activities.
- **Data Source:** Maximus SSA Reporting

- **Who Tracks, Manages and Reports this tool?** Ticket to Work Coordinator
- **Positions:** Individual Goal – Career Development Coach
- **Target:** TBD

Welfare Transition – Participation Rate Tracks the compliance activity of WT participants.

- **Simple Definition:** Tracks the compliance activity of WT participants.
- **Purpose:** To monitor how effective CSCLM is at compelling WT participation.
- **Focus:** Ensure that CSCLM meets or exceeds the mandated participation rate in the All Family and Two Parent programs.
- **Data Source:** OSST
- **Who Tracks, Manages and Reports this tool?** WT/SNAP Program Coordinator
- **Positions:** Team – Applies to all WT program staff.
- **Target:** TBD