



Consortium Meeting
College of Central Florida
Enterprise Center, Suite 206
3003 SW College Rd., Ocala, FL 34474

AGENDA

Friday, February 28, 2020 – 10:00 a.m.

(Revised 2-24-2020)

<http://careersourceclm.adobeconnect.com/consortium2-28-2020/>

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

Call to Order		J. Smith
Roll Call		C. Schnettler
Approval of Minutes, June 19, 2019	Pages 2 - 3	J. Smith

DISCUSSION ITEMS

County Liability		R. Skinner
Senate Bill 1244 / House Bill 1271	Pages 4 - 6	R. Skinner
WIOA Primer for Elected Officials	Pages 7 - 50	R. Skinner

ACTION ITEMS

LEO Agreement	Pages 51 - 58	R. Skinner
Inter-Local Agreement	Pages 59 - 72	R. Skinner
Re-Appointment of Board Members	Pages 73 - 74	R. Skinner
Board Member Appointments	Pages 75 - 81	R. Skinner
Local Plan – Initial Draft	Pages 82 - 171	R. Skinner
By-Laws	Pages 172 - 193	R. Skinner

PROJECT UPDATES

None

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.



**CAREERSOURCE CITRUS LEVY MARION
Consortium**

MINUTES

DATE: June 19, 2019
PLACE: College Of Central Florida, Enterprise Center, Building 42, Ocala, FL
TIME: 1:00 p.m.

MEMBERS PRESENT

Commissioner Smith
Commissioner Gold

MEMBERS ABSENT

Commissioner Brooks

OTHER ATTENDEES

Rusty Skinner, CSCLM
Robert Stermer, Attorney
Cira Schnettler, CSCLM

CALL TO ORDER

Commissioner Smith asked Commissioner Gold to Chair as he was attending by telephone. The meeting was called to order by Commissioner Gold, at 9:30 a.m.

ROLL CALL

Cira Schnettler called roll and a quorum was declared present.

APPROVAL OF MINUTES

Commissioner Smith made a motion to approve the minutes from the February 25, 2019 meeting. Commissioner Gold seconded the motion. Motion carried.

ACTION ITEMS

2019 - 2020 Budget

Commissioner Smith made a motion to approve the 2019-2020 budget. Commissioner Gold seconded the motion. Motion carried.

State ITA Waiver

Commissioner Smith made a motion to approve the request for the State ITA waiver. Commissioner Gold seconded the motion. Motion carried.

Board Member Re-Appointments

Rusty Skinner stated that all the current board members are in good standing and are seeking reappointment.

Commissioner Smith made a motion to approve board member reappointments. Commissioner Gold seconded the motion. Motion carried.

DISCUSSION ITEMS

Board Member Recruitment

Rusty Skinner reviewed the Terms Matrix and encouraged the Commissioners to recruit new board members. Rusty noted that the full board is aware of the vacancies and have been asked to recruit board members as well. He stated that once the contact has been made with a potential member by a board member, he will reach out and provide specifics.

Form 990

Rusty Skinner informed the Commissioners that the 990 has been filed and can be found on the IRS website, the CLM website, and hard copies can be provided if needed.

2019 – 2020 Work Plan

The Work Plan was attached for review.

CEO Contract

The CEO Contract was attached for review.

DEO Investigation of Tampa Bay

Rusty Skinner asked if there were any questions regarding the investigation. Rusty informed the Commissioners that internal monitoring is conducted on a regular basis of our procedures and that the executive committee is working with staff to research the benefits of having an external monitor also review our policies and procedures.

PROJECT UPDATES

Grant Updates

Rusty Skinner reviewed highlights from the presentation. He noted that apprenticeship programs will be developing through-out the year. The current staff handling experiential learning will handle the case management of the apprenticeship programs. The 180 Skills online training program is another tool in our toolbox that can be offered for career exploration and career development. Brenda Chrisman is working with several businesses that have expressed interest in the program as well.

MATTERS FROM THE FLOOR

None

ADJOURNMENT

There being no further business, the meeting was adjourned at 10:15 a.m.

APPROVED:

SB 1244: State Workforce Development Boards

Sponsored by Senator Ben Albritton

SUMMARY:

SB 1244 restructures the duties and authorities of CareerSource Florida Inc. (CSFL), primarily moving them under the 'State Board,' Department of Economic Opportunity (DEO), and/or 'State Board' in consultation with the DEO.

CSFL is replaced with the 'State Board' or the DEO in provisions related to local workforce development boards.

CHANGES TO LOCAL GOVERNANCE/STRUCTURE:

- This bill adds language that the chief elected official may remove a member of the **local board, the executive director of the local board, or the designated person responsible for the operational and administrative functions of the local board for cause.** (Section 5. Section 445.007 (2c))
- Adds language to allow the department to issue technical assistance letters on the operation of federal programs and the expenditure of federal funds by the state board **or any local workforce development board.** The technical assistance letter must be in writing and posted on the department's website, and remains in effect until superseded or terminated (Section 3. Section 445.004 (11.c))
- Removes the process for using a charter process to grant charters to LWDBs and **removed language for allowing local decision making and control as being important in the charter process.** (Section 3. Section 445.005 (11))
- Changes who provides fiscal and programmatic guidance to the state board and **all local workforce boards** from CareerSource Florida, Inc. to the department. (Section 5. Section 445.007 (10))
- Adds prior approval from the department for **local boards to contract with members of that local board.** (Section 5. Section 445.007 (11)) This is a change as prior language allowed fiscal thresholds for notifying DEO of the contract.
- Changes the **submission of the LWDBs annual budget** from CareerSource Florida, Inc. to the department. (Section 5. Section 445.007 (12))

IMPORTANT DEFINITIONS

- The definition of 'for cause' has been removed in reference to the Governor's ability to remove board members, executive directors, or anyone with operational oversight of local boards 'for cause'

- ~~‘For cause’ -- ‘includes but not limited to engaging in fraud or other criminal acts, incapacity, unfitness, neglect of duty, official incompetence, and irresponsibility.’~~
- ‘State board’ -- ‘means the state workforce development board established pursuant to WIOA. State board shall be supported by CareerSource Florida at the direction of the state board in consultation with DEO.’

MAJOR CHANGES:

- 445.003.
 - [Original legislation pertaining to WIOA implementation-](#) has been adjusted to replace ‘CareerSource Florida, Inc.’ with the ‘state board’ and/or the DEO (in several instances the state board will consult with the DEO) in regard to the four-year plan, fund management, and waivers.
 - Long term workforce consolidation authorities are moved from CareerSource Florida, Inc. to the state board.
 - The state board is also granted authority to hire a director to assist the DEO in the functions of WIOA.
 - \$2 million may ~~shall~~ be reserved for the incumbent worker training program (essentially allows funding instead of guaranteeing it)
- State board will enter into MOU with the FL Dept of Education (to fulfill WIOA) and remain in compliance with state workforce development plans.
- Moving Career Source Florida, Inc. under agreement with the department instead of prior wording that the department did not control, supervise, or direct Career Source Florida, Inc. (Section 3. Section 445.004 (1))
- Adds language to define the role of CareerSource Florida, Inc. as providing administrative services to the state board, which serves as the principal workforce policy organization for the state. Also added language that CareerSource Florida, in agreement with the department, will implement directives of the state board and administer workforce programs. (Section 3. Section 445.004 (2))
- Removes the governance of CareerSource Florida, Inc. by a board of directors. (Section 3. Section 445.004 (3a))
- Removes entirely section 13 regarding the creation of regional planning areas and subsequent preparation of regional plans. (Section 5. Section 445.007 (13))
- Adds wording that all donations and grants received by CareerSource Florida must be reported to the department. (Section 7. Section 445.008 (2))
- Changes the approval of other programs recommended for inclusion on the high wage occupations list from CareerSource Florida, Inc. to recommended by the state board and approved by the department. (Section 8. Section 445.009 (8a))
- Changes the review of ITA pricing schedules from CareerSource Florida, Inc. to the department, and allows the department to present findings and recommendations for process improvement to the President of the Senate and the Speaker of the House of Representatives. (Section 8. Section 445.009 (8c))

- Changes the procurement of workforce information systems from CareerSource Florida, Inc. to the department and removes language that a competitive process, including requests for proposals, competitive negotiation, and other competitive processes shall be employed to ensure that the procurement results in the most cost-effective investment of state funds. (Section 9. Section 445.0011 (2))
- Changes the coordination of development and implementation of workforce information systems from CareerSource, Florida, Inc. to the department. (Section 9. Section 445.0011 (3))

THE WORKFORCE INNOVATION AND OPPORTUNITY ACT

A PRIMER FOR LOCAL GOVERNMENT OFFICIALS





The United States Conference Of Mayors

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Mayor of Baltimore
President

Mick Cornett

Mayor of Oklahoma City
Vice President

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Mayor of New Orleans
Second Vice President

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This report was prepared by Rochelle J. Daniels
General Counsel, CareerSource Broward
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THE WORKFORCE INNOVATION AND OPPORTUNITY ACT

A PRIMER FOR LOCAL GOVERNMENT OFFICIALS

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INTRODUCTION: A WORKFORCE SYSTEM FOR THE NEXT DECADE AND BEYOND

A WORKFORCE SYSTEM FOR THE NEXT DECADE AND BEYOND

The Workforce Innovation and Opportunity Act of 2014 (WIOA)¹ is a bill of opportunity and daring. It was born as the country was shaking off the remnants of a recession and reflects Congressional support of America's Job Centers² as well as a desire on the part of the Congress to leverage all of the federally funded workforce programs so that limited funds can serve expanded demand. The Statement of Managers, which accompanied the publication of the bill refers to WIOA as the ***“nation's primary programs and investments in employment services, workforce development, adult education and rehabilitation activities.”*** WIOA, replaces the Workforce Investment Act of 1998, (WIA)³ reauthorizes the Adult Education and Family Literacy Act of 2003⁴, amends the Wagner Peyser Act of 1933⁵, amends and reauthorizes various sections of the Rehabilitation Act of 1973⁶.

WIA was Congress' first serious attempt to urge states and localities to coordinate and integrate programs and services. The degree to which state and local workforce providers cooperated was largely left to the good intentions of the agencies and organizations providing the services. In WIOA, we see the future of workforce unfolding into a system of coordinated, integrated and regionalized service delivery moving closer and closer to seamless access for the job seeker and business customers.

Of the nation's investments in workforce, the WIOA adult, dislocated worker and youth systems, programs and assets are the three funding streams whose resources, investments and activities are controlled by local elected officials together with the majority private sector boards that they appoint.

The WIOA Title I adult, dislocated worker and youth funds are awarded by formula to each local workforce development area. Chief local elected official(s), together with their local workforce development boards, are charged with making policy decisions for their area to address the workforce needs of their citizens and residents. Economic, business and job development are local initiatives. The opportunity for local areas in WIOA lies in the agility of local board members and local elected officials to immediately respond to the changing needs of their local communities. WIOA has great flexibility allowing local decision makers to be nimble in implementing the right strategy, at the right, time to satisfy the demands of their local economy.

One of the most critical changes to WIOA from its predecessor WIA is recognizing the employer as a customer with needs equal to those of workers and jobseekers. The local system operated under this assumption throughout WIA implementation but the formal acknowledgement in WIOA clearly appreciates the significant role of employers in any workforce strategy. This opens the door to being able to invest resources in new ways to engage employers and is sure to make the workforce system more relevant to employers.

¹The Workforce Innovation and Opportunity Act 29 U.S.C. § 3101 et seq

²Often referred to as one-stop centers or one-stop career centers

³28 U.S.C. § 2801 et seq (2015)

⁴29 U.S.C. § 3101 et seq (2015) Note (Chapter 32, Subchapter II)

⁵29 U.S.C. § 49 et seq (2015)

⁶29 U.S.C. § 701 et seq (2015)

Another central theme that winds its way throughout the legislation is coordination among core and one-stop partners with respect to funding, data collection and sharing information. Acknowledging the benefit of coordination is what will make the partners work in unison.

To make sure that workforce partners, providers and the public are involved in as much of the decision making as possible, state and local boards must make their membership, meetings, meeting minutes and their plans available to the public. Decisions including approval of state and local plans must be made in the “sunshine” and membership lists, member affiliations, meeting minutes and notice of meetings need to be published in advance to give the public access to the process. So while workforce boards may be smaller under WIOA, the tent is pitched so that everyone may enter and be a part of the one-stop as well as many of the decision-making processes.

Shortly after the passage of WIOA, the United States Department of Labor (USDOL) held a series of capacity-building sessions to introduce WIOA to the workforce system. They described the changes in moving from WIA to WIOA with the follow phrases:

- Strengthening the governing bodies that establish state, regional and local workforce investment priorities;
- Fostering regional collaboration to meet the needs of regional economies;
- Aligning federal investments to support job seekers and employers;
- Targeting workforce services to better serve job seekers;
- Improving services to individuals with disabilities;
- Helping employers find workers with the necessary skills; and
- Aligning goals and increasing accountability and information for job seekers and the public.



WIOA and its proposed regulations unfold over more than 1,000 pages of text. Another way of describing the change from previous workforce legislation is encapsulated in the following broad topical areas:



GOVERNANCE



REGIONALISM



COORDINATION



ONE-STOP OPERATIONS



EMPHASIS ON SELF-SUFFICIENCY FOR THE NATION'S MOST FRAGILE



BUSINESS AS A CUSTOMER



INVESTMENTS IN TRAINING



YOUTH PROGRAMS



PERFORMANCE

GOVERNANCE: WHO'S ON FIRST?



ANSWER: The state.

QUESTION: How does my city, county, municipality become a workforce area?

ANSWER: It's complicated.

THE STATE'S ROLE

As in WIA, Governors are tasked with appointing state board members just as the chief, local elected officials in a workforce development area are tasked with appointing local board members. Membership on both the state and local boards is different under WIOA from what was required under WIA. The following chart shows the difference in membership at the state board level under WIA and WIOA:

STATE BOARD MEMBERSHIP

Required Category	WIOA ⁷	WIA ⁸	Notes
One member from each chamber.	Yes	Yes	Appointed by the presiding officers of each chamber, same as WIA.
Private sector majority.	Yes	Yes	WIA and WIOA have similar nominations processes with the governor selecting the chair. WIOA requires small business representatives and includes representatives of business organizations in the definition of private sector member.
Organized Labor.	20%	2	WIOA requires a minimum of three labor representatives. To meet the 20 percent requirement for this category, the balance of the members may be representatives of labor or community based organizations.
Representatives with experience with respect to youth activities.	No	2	
One member with primary responsibility for Vocational Rehabilitation.	Yes	Yes	These are the core partners. They share common performance measures. State board members may only represent one category of membership, business, workforce or government. Under WIA, these funding streams were required one-stop partners
One member with primary responsibility for Wagner-Peyser.	Yes	Yes	
One member with primary responsibility for the adult, dislocated workers and youth workforce funding streams.	Yes	Yes	
One member with primary responsibility for Adult Education and Family Literacy.	Yes	Yes	
Chief elected officials from a city and a county where appropriate.	Yes	Yes	
State agency officials from agencies that are one-stop partners.	Optional	Yes	
State agency officials representing economic development.	Optional	Optional	
Individuals representing Native American Tribes.	Optional		
State agency officials representing education.	Optional	2	WIA required two representatives with experience and expertise in the delivery of workforce investment activities, which could be from the community colleges or community-based organizations.
State agencies representing Juvenile Justice.		Optional	No specific reference in WIOA.

⁷29 U.S.C. § 3111 (2015)

⁸29 U.S.C. § 2829 (2014)

WIOA is much more detailed than WIA in its description of state board functions. Apart from setting policy and making recommendations on state level deployment of WIOA, there are new responsibilities that directly affect local delivery systems.

The chart below compares the state board's role under WIA and WIOA.

THE STATE WORKFORCE DEVELOPMENT BOARD	
WIA	WIOA
Development of the state plan.	Development, implementation, and modification of the state plan.
Comment annually on the Carl D. Perkins Vocational and Applied Technology Education Act measures.	Review statewide program policies. Make recommendations on the alignment of workforce programs to achieve a comprehensive and streamlined system. Review and comment on non-core program one-stop partner state plans.
Development and continuous improvement of statewide system activities carried out by the one-stop system.	The development and continuous improvement of the workforce system including:
Develop linkages to assure coordination and non-duplication among one-stop partners.	<ul style="list-style-type: none"> • Identify barriers and ways to remove barriers to better coordinate, align, and avoid duplication among the system's programs and activities; • Identify regions, including planning regions. Designate local areas after consultation with local boards and chief elected officials; • Develop strategies to support the use of career pathways for low-skilled adults and youth with barriers to employment or disabilities with workforce activities, education, and support services to enter or retain employment; • Develop outreach and improved access strategies to workforce system services for job seekers and employers; • Develop and expand in-demand industry / occupational sector strategies to meet employer, worker and job-seeker needs; • Develop and continuously improve the local one-stop system by assisting local boards, one-stop operators, one-stop partners, and providers with planning, service delivery, training and support services; • Develop strategies to support staff training and awareness across the workforce system;
Review local plans.	
Develop local allocation formulas for adult and youth activities.	Develop local allocation formulas for adult and youth workforce activities.
Develop statewide employment statistics system per Wagner-Peyser Act §15(e).	Develop the statewide workforce and labor market information system.
Prepare the annual report to the Secretary.	Prepare the annual reports.

THE STATE WORKFORCE DEVELOPMENT BOARD

WIA	WIOA
<p>Develop continuous improvement of state performance measures to assess the effectiveness of the workforce investment activities in the state as required under §136(b).</p>	<p>Develop and update state performance accountability measures, including state-adjusted levels of performance, to assess the effectiveness of the core programs;</p> <p>Identify and disseminate best practices for:</p> <ul style="list-style-type: none"> • Business outreach partnerships and service delivery strategies for use by the one-stop; • Development of effective local boards, how to exceed performance measures, sustain fiscal integrity, and any other measures of effectiveness; • Training programs that respond to real-time labor market analysis, use of direct and prior learning assessments to measure knowledge, skills, competencies, and experience, to evaluate transferability of skills, and competencies for placement into employment or career pathways. <p>Develop and review statewide policies affecting coordination of services in the one-stop regarding:</p> <ul style="list-style-type: none"> • Objective criteria and procedures local boards can use to assess the effectiveness and continuous improvement of one-stop centers; • Guidance regarding the allocation of one-stop center infrastructure funds; • Policies regarding roles and contributions of entities carrying out one-stop partner programs in the one-stop including how to facilitate cost allocation in such system. <p>Develop technology based strategies to facilitate access to, and improve the quality of one-stop services and activities by:</p> <ul style="list-style-type: none"> • Enhancing digital literacy skills; • Accelerating skill and post-secondary credentials acquisition; • Strengthening the professional development of providers and workforce professionals; • Ensuring technology is accessible to individuals who reside in remote areas or have disabilities. <p>Develop strategies, with local input, to align one-stop partner technology and data systems to improve services coordination, implement common intake, data collection, case management, performance measures and reporting processes.</p>
<p>Develop an application for an incentive grant under section 503.</p>	<p>Develop policies to promote statewide objectives and enhance the performance of the state workforce development system.</p>

As can be seen by comparing the list of WIA responsibilities against the list of WIOA responsibilities, the state board has been assigned broad authority under WIOA to provide policy and guidance to local boards, local one-stop delivery systems and one-stop partner programs. While many of the state board recommendations and decisions affecting the local workforce areas require consultation with local elected officials and local boards, consultation has not been further defined in the law or regulations and as such may be construed as nothing more than notice and an opportunity to be heard. There is no requirement for the state to act on the consultation.

The areas requiring the state to consult with the local elected officials and/or boards consist of:

STATE DECISIONS REQUIRING CHIEF LOCAL ELECTED OFFICIAL/LOCAL BOARD CONSULTATION
DESIGNATION OF LOCAL AREAS
DESIGNATION OF REGIONS ESTABLISHMENT AND OPERATION OF THE FISCAL AND MANAGEMENT INFORMATION SYSTEM
THE CRITERIA TO BE USED TO CERTIFY ONE-STOP CENTERS
GUIDANCE ON EQUITABLE AND STABLE ONE-STOP INFRASTRUCTURE FUNDING
NEGOTIATING WITH ONE-STOP PARTNERS ON FUNDS FOR ONE-STOP INFRASTRUCTURE
THE LOCAL ALLOCATION FORMULA FOR ADULT, DISLOCATED WORKER AND YOUTH FUNDS
WAIVER REQUESTS

LOCAL WORKFORCE AREAS

To be awarded WIOA funds, states must first designate local workforce development areas⁹. The purpose of a local area is to serve as a jurisdiction for the administration of workforce development activities and funds allocated by the state for the one-stop system, adult, dislocated worker, and youth programs¹⁰. The local governmental unit is the grant recipient for the formula funds awarded to local workforce development areas and is liable for the funds. Within each local workforce development area, the local workforce development board, appointed by the chief local elected official(s), oversee the functions of the administrative entity. The local boards, together with the chief local elected official(s) as assigned by WIOA, are responsible for strategic planning, service delivery design choices, resource investment decisions, one-stop infrastructure cost negotiations, and coordination among the one-stop partners at the sub-state level.

Previous workforce legislation dating back to the Comprehensive Employment and Training Act of 1973¹¹, identified local areas using local units of government and population as the criteria. Once an area consisting of a unit or two or more contiguous units of local government met the population threshold, a request by the chief local elected official to be designated a local workforce area had to be honored by the state. The criteria for designation as a local workforce area under WIOA are different from previous legislation.

Under WIOA, local workforce areas which were workforce areas under the Workforce Investment Act (WIA) of 1998 must be designated if:

- The area met the federal performance measures for the two program years preceding the passage of WIOA;
- The area exhibited fiscal integrity; and
- The chief local elected official requests designation.

⁹ There are a few states which are considered single workforce area states. In those states the governor acts as the chief local elected official for the statewide workforce area and the state board stands in the place of a local board. States which had local areas under WIA cannot become single state areas under WIOA, unless all the local areas agreed not to seek designation.

¹⁰ 20CFR679.220 (2015)

¹¹ 29 U.S.C. § 801. Repealed

¹² Training Employment Guidance Letter 27- 14 (April 15, 2015)

¹³ 29 U.S.C. §3121. Met performance is further defined to mean that the local area met at least 80% of the negotiated level of performance. Met and failed performance will be defined in accordance with the state's plan following initial designation.

The terms “performed successfully” and “fiscal integrity” are defined in the statute and by the USDOL in a Training and Employment Guidance Letter (TEGL)¹² and in their proposed regulations. “Performed successfully” means that a local area met their negotiated federal performance measures for the two years preceding WIOA enactment and thereafter for the two year modification period governing local plan approval. “Met negotiated performance” means the local area did not fail any individual measure two years in a row¹³. “Fiscal integrity” means that there has not been a formal determination by the Secretary of Labor that the grant recipient or administrative entity mis-expended funds due to willful disregard of the law or regulations, gross negligence, or failure to comply with accepted standards of administration for the two-year period preceding the determination.

Designation of local areas is biennial. Thereafter to continue to be eligible for designation, performance and fiscal integrity standards must be met every two years by those areas which were designated under the above criteria. Once initial designation is satisfied, the proposed regulations relieve local elected officials from having to request re-designation every two years.

If a political unit or units of government was not previously designated as a workforce area, WIOA provides guidance for state consideration of an application by a single or multiple units of local government through its chief elected officials. But workforce area designation status is at the governor’s discretion following state board recommendation. Local governmental units that were not previously workforce areas are dependent upon the below listed criteria, state board recommendation and governor approval to be designated.

DESIGNATION CRITERIA FOR NEW WORKFORCE DEVELOPMENT AREAS

- The extent to which an area is consistent with labor market areas;
- The extent to which an area is consistent with regional economic development areas;
- Whether the area has sufficient federal and non-federal resources to administer the WIOA activities, and
- The availability of education and training providers in the area.

There is no mandate in the law to grant a local request. In addition to consultation with chief local elected officials, the governor must allow an opportunity for the local elected officials, the local board and the public to provide public comment prior to a final decision. Governors may re-designate areas at any time, even within the two year designation period upon a request from an area that meets the above criteria and is recommended for designation by the state board, or upon review and evaluation of whether an area continues to meet the requirements for designation.

If a local area is not initially or subsequently designated, the law requires the state to provide a “due process” appeal. Local areas may appeal a denial of workforce area designation to the Secretary of Labor once the state level appeal process has been completed.

REGIONALISM



In addition to designating local workforce development areas to be awarded their WIOA state grant, governors must develop a policy and process for identifying regions in their state¹⁴ in consultation with local boards and chief local elected officials by July 1, 2017. Regions may consist of a single workforce development area, two or more contiguous workforce areas, or even two or more contiguous interstate workforce areas. When a region consists of two or more workforce development areas they are referred to as “planning regions.”¹⁵ Designated local workforce development areas may not be split and assigned to two different regions.

In creating regions the governor may consider whether the local workforce areas:

- Share a labor market area;
- Share a common economic development area;
- Possess the federal and non-federal resources to administer WIOA activities;
- Population centers;
- Commuting patterns;
- Land ownership;
- Industrial composition;
- Location quotients;
- Labor force conditions;
- Geographic boundaries; and
- Additional factors the Secretary of Labor might prescribe.

If two or more local workforce development areas are assigned to a region and become a “planning region,” the local workforce development boards and chief elected officials must enter into a joint planning process that results in:

- A single regional plan rather than individual workforce development area plans;
- Development of regional service strategies for job seekers and workers;
- Development of cooperative service delivery agreements;
- Development of sector initiatives for in-demand industries and occupations;
- The analysis and use of the region wide labor market data in partnership with the state;
- The establishment of administrative cost arrangements including the pooling of administrative costs as appropriate;

- The coordination of services with regional economic development initiatives; and
- Agreement on how the local workforce areas in the planning region will negotiate local performance accountability measures for the planning region.

Clearly, local areas grouped into regions will have to behave as one entity even though the allocations to each area within the planning region will be separately awarded. This may present some challenges depending upon the relationship and the focus of the local areas within a planning region. WIOA requires states to provide financial assistance to local areas that want to merge and become one area. The takeaway here is that WIOA may, over time, result in fewer local workforce areas. Smaller areas may consolidate within the regions they are assigned to and become part of a larger overall workforce area.

CHIEF LOCAL ELECTED OFFICIALS

Once a local workforce area has been designated, the chief local elected official is required to appoint a local workforce development board. There must be one workforce development board for each workforce development area in a state. Workforce development boards are organized differently around the country. Some of the boards are organized as not for profit corporations. Others operate under the umbrella of a local governmental unit in a manner similar to that of a planning and zoning board appointed by a county or municipality. Staff providing support for the board may be employed directly by the board, by a governmental unit in the workforce development area, by a council of governments or an alternative entity under contract with the board or governmental unit.

In a workforce development area consisting of one unit of local government, it is easy to identify the chief local elected official. It will either be the mayor or the chair of the county commission, depending on the nature and type of governmental unit. In a local area that includes more than one unit of general local government, it will be those elected officials designated pursuant to a contract or an agreement, sometimes referred to as an inter-local agreement, entered into between those units of government to form a consortium of governments as described in WIOA §107 (c)(1)(B).

¹⁴ 29 U.S.C. §3121, WIOA §§102(b)(2)(D)(i)(iii), 106(a)(1), 20 CFR 679.210 (2015)

¹⁵ Id.

“IN GENERAL. In a case in which a local area includes more than one unit of general local government, the chief elected officials of such units may execute an agreement that specifies the respective roles of the individual chief elected officials ...”

The agreement must address who will appoint the local workforce development board members, the appointment process, and how the local elected officials will carry out the responsibilities assigned to local elected officials under WIOA. Where local elected officials representing multiple units of government in a local workforce development area cannot come to an agreement, the law directs the governor to step in and appoint the workforce development board.

Multiple units of government entering into an inter-governmental or inter-local agreement may consider creating a council or board consisting of a representative number of elected officials from the units of government in the area authorized to act for all the governmental units in that workforce area. Generally these agreements should describe:

- How the WIOA required actions and activities attributable to the local elected officials will be carried out;
- The process for selecting one of the elected officials to serve as the chief local elected official for the local area;
- How liability for the funds will be distributed among the governmental units; and
- The selection process for the workforce development board members.

The agreement may also include any other conditions agreed to by the elected officials. The form of agreement will be governed by the state law.

The following are the responsibilities assigned solely to local elected officials under WIOA:

SERVE AS THE GRANT RECIPIENT OR DESIGNATE A SUB-GRANT RECIPIENT

The governmental unit may be the grant recipient, employ the staff that comprises the administrative entity or may designate the board or a third party entity to serve as the sub-grant recipient.

ENTER INTO AGREEMENTS WITH EACH OTHER IN MULTI-JURISDICTIONAL AREAS

If a local workforce development area consists of more than one unit of general purpose government, the local elected officials must agree on how the responsibilities assigned to chief local elected officials will be deployed.

The agreement would ordinarily be approved by a county commission, city council or similar body. The agreement may assign the responsibility for the official who will be the chief local elected official for the area, or may allow for the elected officials, who represent each of the governmental units to select who among them will fill that role. They may even agree to rotate the role of chief elected official.

BE LIABLE FOR THE FUNDS

While the grant recipient (the sub-state governmental unit) may not transfer liability for the funds, the grant recipient may and should require that their sub-grant recipient purchase appropriate insurance coverage and that the policies indemnify or co-insure the grant recipient. Generally, almost every contingency can be covered by insurance except mismanagement. Even then errors and omissions insurance may cover all possible contingencies. However, the cost of errors and omission insurance may have to come from non-federal resources.

REQUEST LOCAL AREA DESIGNATION

In order for an area to be designated, the chief local elected official must request in writing that the governor designate the area as a workforce development area. WIOA provides that once designation is perfected, it will be assumed that the chief local elected officials want to continue to be designated without their having to make the request at the end of every workforce plan cycle. WIOA chief local elected officials would only need to make a request if they no longer wanted their governmental unit to be a workforce development area, wanted to join a different area or wanted to merge areas.

SELECT A FISCAL AGENT

The governmental unit determines the organization that will serve as the fiscal agent as it is the governmental unit that is liable for the funds. Most frequently, if the local governmental unit does not want to act as the fiscal agent, the local workforce board serves as the fiscal agent/administrative entity and disburses the funds, but that is not the only option. A third party organization may also serve as the fiscal agent and/or the administrative entity and be responsible for disbursing the funds. The entity serving as the fiscal agent draws down the grant funds, reports on expenditures to the state, and provides for an annual audit in accordance with the Office of Management and Budget requirements. The ability to provide an accurate monthly financial report on expenditures means that the board and elected officials can make course corrections as needed to assure funds allocated to the local area are being spent as intended. The expenditure of funds is governed by the “first in first out” rule, meaning the oldest money is

deemed to have been expended prior to any later award of funds. Local areas have two years to spend their funds and may only carry forward 20 percent of their allocations from one year to the next. Local areas which cannot accurately account for their expenditures on a monthly basis may also be experiencing other more serious fiscal integrity issues.

CREATE BY-LAWS WITH RESPECT TO THE LOCAL BOARD APPOINTMENT PROCESS

This is a new requirement under WIOA intended to squarely place the appointment process for the local workforce development boards on the chief local elected official(s).

APPOINT LOCAL WORKFORCE BOARD MEMBERS

All private sector members recommended for appointment to the local board must be nominated by a local business association, such as a chamber or economic development council, or by a trade association.

There is also a nomination process applicable to non-private sector and labor representatives. Many local workforce development boards have standing or ad hoc nominating committees. These committees assist in identifying persons in the community interested in serving on the local board.

Individuals appointed to local boards are expected to have optimum policy-making authority for their organizations. This means that they can make commitments for their organization. In making appointments, an individual may represent more than one category of membership if they meet all the criteria for representation. All required board members must have voting privileges

IDENTIFY INDIVIDUALS IN ADDITION TO THE MANDATORY BOARD MEMBERS TO SERVE ON THE LOCAL BOARD

Chief local elected officials may appoint individuals to the local workforce development board in addition to the mandatory members so long as: 1) the appointments do not run afoul of the governor's certification requirements; 2) the majority private sector requirement is maintained; and 3) the 20 percent labor representatives requirement is met. When non-mandatory members are appointed to the board, the appointing official must determine whether to award voting privileges to the non-mandatory board member.

CONSULT WITH THE GOVERNOR ON THE REORGANIZATION OR DECERTIFICATION LOCAL BOARDS

Reorganization and decertification are punitive actions available to the governor to address failed performance, fraud, abuse or mismanagement.

The role of the local elected officials in oversight over the workforce system can be limited to those things described in the law or can be expanded to meeting jointly with the board they appoint and weighing in on all the decisions.

The local elected officials appoints the local workforce boards. Prior to doing this the statute and regulations state that the chief local elected official must establish by-laws that describe the appointment process. The by-laws must include:

- The nomination process for the board chair and members;
- The length of the board member appointment terms. Member terms must be staggered so not all member terms expire at the same time;
- Board member term limits;
- The notification process for board vacancies;
- Whether proxies or alternate designees will be allowed;
- How technology, such as phone and the internet, will be used to promote board participation;
- A process to ensure the board convenes local stakeholders, brokers relationships with employers and leverages support for the workforce system;
- Any other conditions governing appointment or membership on the local boards as desired by the elected official(s).

These are new requirements. The purpose is to assure local elected officials stay connected with their boards.

Local workforce development boards can be much smaller than the workforce investment boards under WIA. It is no longer required that the local boards include a representative of each of the mandatory one-stop partners. Other than the private sector and organized labor members, the other categories of membership require only one representative. WIA boards ranged from 33 members to over 50 members. WIOA boards may number as few as 19 members. This reduction in required board members was in response to: 1) the difficulty experienced by some rural communities in filling all the required seats, and 2) a consensus that it was difficult for the large WIA boards to be as strategic as was anticipated by the previous legislation.

WORKFORCE DEVELOPMENT BOARD MEMBERSHIP AND NOMINATION REQUIREMENTS

LOCAL WORKFORCE DEVELOPMENT BOARDS

Category	Nominated By	Notes
Private Sector ¹⁶	Local business organizations or business trade associations.	Must be the majority of the members. Two Members must be from small business. ¹⁷
Labor Representatives Minimum of three members	Local labor federations or, if none, by other representatives of employees.	Must comprise 20 percent of the board. Two members from labor organizations. ¹⁸ One training director or union member from a joint labor-management or union-affiliated registered apprenticeship program. The balance of the 20 percent may be from specified community-based organizations. ¹⁹
A provider administering adult education and literacy activities	If there is more than one provider locally, the providers nominate the member.	One Member. Core One-Stop Partner.
A higher education representative	If there is more than one provider locally the providers nominate the member.	One Member. Provide workforce investment activities. Can be the community college.
An economic and community development entity representative		One Member.
The state employment service office		One Member. Wagner-Peyser Act Core One-Stop Partner.
Vocational Rehabilitation		One Member. Rehabilitation Act Core One-Stop Partner.
Entities administering education and training activities		Optional Member. Representatives of local educational agencies or community-based organizations with expertise assisting individuals with barriers to employment.
Governmental and economic and community development entities		Optional Member. May represent transportation, housing, and public assistance programs.
Philanthropic organizations		Optional.
Other individuals selected by the chief elected official		

¹⁶Means an owner, chief executive officer, chief operating officer, or individual with optimum policy-making or hiring authority and provide employment opportunities in in-demand industry sectors or occupations

¹⁷Small business is defined in accordance with the US Small Business Administration

¹⁸Where labor organizations don't exist in the area, representatives must be selected from other employee representatives. If no union-affiliated registered apprenticeship programs exist in the area, a representative of a registered apprenticeship program with no union affiliation would be appointed.

¹⁹1) Expertise in addressing the employment, training or education needs of individuals with barriers to employment; 2) Serve veterans; 3)Provide or support competitive integrated employment for individuals with disabilities; 4)Expertise serving eligible youth.

CHIEF LOCAL ELECTED OFFICIALS AND LOCAL WORKFORCE DEVELOPMENT BOARDS

The state, chief local elected official(s) and local boards all have distinct and overlapping roles in providing policy direction and oversight over the workforce development system. At the local level, the chief local elected official(s) and local workforce development boards are jointly responsible for the tasks listed below.

COMMENT ON THE STATE PLAN

This is an opportunity for the board and elected official(s) to provide their input on those portions of the state plan which will impact the local workforce development system.

DEVELOP THE LOCAL FOUR-YEAR PLAN

The local plan is the road map that spells out how the resources allocated to the local workforce development system will be invested in meeting the WIOA objectives. The local plan must be reviewed and updated every two years to reflect changes in the local economy.

REGIONAL PLANNING

Regional planning means that the local board and chief local elected official(s) in all the areas that comprise the region must agree to the elements of a single local plan. The plan will need to reflect how the region will coordinate to provide seamless access to services across the region.

SET POLICY FOR THE LOCAL AREA

The chief elected official and local board set policy for the local area. It is important for the chief local elected official(s) and local board to determine what matters must come before them and what can be handled by staff. Anything that must come before the board and/or the chief local elected official(s) should appear on a board agenda for approval at a publicly noticed meeting.

ENTER INTO AN AGREEMENT REGARDING THEIR ROLES AND RESPONSIBILITIES

The local governmental units and local boards may serve in a variety of roles such as fiscal agent, local board staff, one-

stop operator, direct provider of career services and/or training provider. WIOA requires that chief local elected official(s) and the board enter into an agreement to spell out their respective roles and responsibilities. A good way to do this is to list each of the governance and policy areas required by WIOA and assign them to the chief local elected official(s), the workforce development board, the board and elected officials acting in concert, or the staff. By doing this, each actor in the administration of the funds, programs, activities and services will know where their responsibility lies.

DEVELOP THE LOCAL BOARD BUDGET

The joint responsibility of deciding on the funds necessary to support the local board must be done in the context of all the other services and activities which need to be funded in the local area. In practice, it is the entire budget which must be considered and approved. In addition to approving how federal funds will be spent, WIOA requires joint approval regarding the use of non-federal funds.

APPROVAL OF NON-MANDATORY ONE-STOP PARTNERS

WIOA lists those programs and funding streams that legislatively must participate in the one-stop system. These programs are referred to as the mandatory partners. Often other organizations want to be included. All non-mandatory partners must be approved by the chief local elected official(s) and the local workforce development board. The one-stop partners must enter into a memorandum of understanding (MOU) with the local board regarding the deployment of their services through the one-stop and their support of the infrastructure. Non-mandatory partners must be willing to participate in the one-stop MOU.

SELECT AND TERMINATE THE ONE-STOP OPERATOR

The one-stop operator is selected jointly by the chief local elected official(s) and the local workforce development board. The one-stop operator is required to be competitively selected.²⁰ A new procurement must be released every four years. The chief local elected official(s) and local workforce development boards must agree if the workforce development board wants to serve as the one-stop operator. However, even if they agree, the local board must still participate in a competitive procurement that has the firewalls in place to assure that conflict-of-interest principles are observed. Finally when the

²⁰One-stop operator selection must be made in accordance with the procurement requirements set forth in 2 CFR 200 Uniform Administrative Requirements, Cost Principles, And Audit Requirements for Federal Awards.

local board wants to serve as the one-stop operator, gubernatorial approval is also required. The roles and responsibilities of the one-stop operator are not specified in WIOA, except to require that the one-stop operator coordinate among the one-stop partners. Local workforce development boards, together with their chief local elected official(s), would be responsible for determining the responsibilities of the one-stop operator and including those responsibilities in the one-stop operator procurement specifications.

WORK WITH THE GOVERNOR IN A DISASTER

In the event of a natural disaster or when a governor declares a state of emergency, funds are often allocated to assist the affected areas to recover from the disaster.

OVERSIGHT

Local workforce development boards and chief local elected official(s) are responsible for providing program and fiscal oversight. This is one of their most important joint responsibilities. Every three years local boards must assess the effectiveness, program and physical accessibility of the one-stop using continuous improvement principles developed by the state board, as well as any stipulated local criteria. While the assessment must occur every three years, it is expected that local boards and elected officials will review and the update continuous improvement criteria every two years as part of the local plan modification process. One-stops will have to meet state and local certification criteria in order to be able to receive contributions toward the funding of the infrastructure from the core partners.

NEGOTIATE THE PERFORMANCE MEASURES

There are six federal adult/dislocated worker and six federal youth WIOA performance measures. The measure attainments are negotiated first between the state and the Department of Labor and then by the governor and local workforce areas or regional planning areas. Failure to meet a measure two years in a row may lead to reorganization of the local board.

APPEAL A GOVERNOR DECISION TO REORGANIZE

Local boards may be decertified or subject to reorganization:

- If they fail the same performance measure two years in a row;
- For fraud or abuse;
- For failure to carry out the functions of the local board as described in WIOA and the regulations.

In such instance, governors must confer with the chief local elected official(s) prior to making the determination to decertify or reorganize the local board. Decertification or reorganization may mean the appointment of a new local board, a different administrative entity or fiscal agent, selection of a different one-stop operator or service providers.

LOCAL WORKFORCE DEVELOPMENT BOARDS

Local workforce development boards must be certified by the governor every two years. The governor is charged with developing the state certification criteria. In most states the criteria has mirrored the federal membership requirements, however, in some states governors have added their own criteria. Just as WIOA elaborates on the duties and functions of the state and local elected officials, WIOA also specifies the expectations regarding local workforce development boards' functions and activities. Many of the local board functions are also translated into actions necessary for the board and local elected officials to complete their four-year plans.

Boards are expected to begin their plan by agreeing to a strategic vision and goals targeted at preparing an educated and skilled workforce. To do this, local boards are asked to plan a one-stop system that will coordinate and align programs and resources with those of the WIOA core partners, and identify the other workforce partners to be included in the workforce system. Local boards must describe many of their functions in terms of the strategies they will employ to carry out those functions in their local plans. The local plans must be developed and approved by both the chief local elected official(s) and the local workforce development board. The local board functions are listed below along with the ancillary plan requirement as appropriate.

LOCAL BOARD FUNCTIONS AND RESPONSIBILITIES

Function	Comment
Elect a chair.	Although the elected official(s) appoints the board, the board may elect its own chair.
Create standing committees and <ul style="list-style-type: none"> • Direct their activities; • Appoint the members; • Assure the chair is a board member. 	<p>It is the norm for boards to create committees to help carry out their business. Committees can pay attention to single issue concerns that would be difficult to address at board meetings with large agendas.</p> <p>Under WIOA, a youth council is no longer required. Most of the one-stop partners are also no longer required to be appointed to the local board. Committees are a way to include community stakeholders and to recruit new board members.</p> <p>WIOA suggests that boards consider creating standing committees to address 1) youth issues; 2) one-stop issues; and 3) disability issues in employment. If created, the committees are required to include non-board members.</p> <p>Boards can decide whether to create the recommended committees or to create other or no committees.</p>
Analyze economic conditions	<p>Boards make decisions regarding training and resource investments. They can make better decisions if they are aware of new and emerging industries and occupations and anticipate changes to the local job market over the course of the two-four-year WIOA plan.</p> <p>This is a local plan requirement. The local plan must describe how boards will coordinate with economic development including the promotion of entrepreneurial skills training and microenterprise services. This requires the board to be aware of the economic conditions in their area.</p>
Engage employers Pursue employer linkages through intermediaries	<p>Boards are asked to engage employers:</p> <ul style="list-style-type: none"> • As a recruitment strategy for new members; • To encourage employer use of the one-stop system; • To enhance communication and collaboration between employers, economic development, and service providers; and • To ensure workforce activities meet employer needs and support economic growth. <p>This is a local plan requirement. The plan must include an analysis of the knowledge and skills needed by local employers and the strategies and services that will be used to facilitate employer engagement. This cannot be done without engaging employers.</p> <p>A new option for boards is to use intermediaries to meet business needs, coordinate workforce programs with economic development, and to strengthen linkages between the one-stop and unemployment insurance through work-based training options.</p>

LOCAL BOARD FUNCTIONS AND RESPONSIBILITIES

Function	Comment
Assist the Governor to develop, collect, analyze and use statewide Wagner-Peyser labor market information.	<p>Local boards are urged to gather information about the workforce needs in their communities by coordinating with other local and state workforce organizations.</p> <p>Often local board members are aware of changes to the labor market in advance of the state. Local boards use labor market information to make decisions about investments in their local workforce areas.</p> <p>This is a local plan requirement. Labor market information is used to trend hiring and layoffs. The state provides rapid response services in the event of a business closing or layoff. Local areas share rapid-response responsibilities with the state and must describe how they will coordinate with statewide rapid response.</p> <p>Any activities involving hiring or layoffs require a knowledge of the labor market conditions.</p>
Convene stakeholders.	<p>Local boards are encouraged to convene stakeholders to get their input as a part of the local plan development.</p> <p>Many of the stakeholders are no longer required members of the local board. These same entities have important information about the local economy and labor market. By bringing them together, boards can identify non-federal expertise and resources which can be invested in the local workforce system.</p> <p>This is a local plan requirement. Local boards are asked to describe their successful strategies and how they will be disseminated and shared.</p> <p>As a part of the planning process, local boards must invite stakeholders and the public to comment on the plan prior to its submission to the state.</p> <p>All these activities are a part of the board's role as a convener.</p>
Lead efforts to develop and implement career pathways.	<p>Career pathways and career plans are required elements of participant assessment and service strategy decisions.</p> <p>Many states have already adopted career pathway strategies to help youth, adults and dislocated workers make training decisions. This strategy is being universally used throughout the workforce system to align participant services with their career futures.</p> <p>This is a local plan requirement. The plan must describe how the local board and core program partners will expand access to employment, training, education, and support for eligible individuals, and facilitate development of career pathways and co-enrollment in core programs.</p>

LOCAL BOARD FUNCTIONS AND RESPONSIBILITIES

Function	Comment
Identify and promote strategies and initiatives to meet employer, worker and jobseekers needs.	<p>With the employer as a customer equal to jobseekers and workers, local boards must assure that the one-stop system provides both physical and program accessibility to all users.</p> <p>Local boards like the state board are prompted to identify proven and promising best practices among workforce partners and stakeholders.</p> <p>This is a local plan requirement. The local plan must include an analysis of the workforce in the region, by describing who comprises the current labor force, employment and unemployment data, information on labor market trends, and the educational and skill levels of the workforce.</p> <p>Strategies in this regard will also be connected to the continuous improvement principles, which are a part of the WIOA objectives.</p>
Local boards must enter into a memorandum of understanding (MOU) with the one-stop partners to identify their contributions to the one-stop infrastructure and the services the partners will deliver through the one-stop system.	<p>Boards must ensure access to services throughout their workforce area or planning region. There is an underlying assumption that expenditures to make this happen will be allocated by the board, the elected official(s) and the one-stop partners.</p>
Facilitate one-stop partners' integration of intake and case management systems.	<p>Boards are asked to examine the needs of individuals with barriers, identify strategies to meet their needs, such as through digital literacy skills, and augment traditional service delivery options to maximize the effectiveness of the workforce system.</p>
Facilitate access to one-stop services including the development of strategies to take advantage of technology advances.	<p>However, in the case of coordinating intake and case management systems and perfecting the MOU, as well as exchanging information among workforce system stakeholders, state and possibly federal assistance will be needed to make this a reality.</p> <p>This is a local plan requirement. A description of the one-stop delivery system must be laid out in the plan. Providing access to the disabled in compliance with the Americans with Disabilities Act ²¹ (ADA) is a requirement in the operation of the one-stop. The board must describe its strategies for facilitating access to one-stop services including in remote areas. There is an expectation that boards will invest in technology to accomplish both of these objectives.</p> <p>As a part of the technology strategies, boards are asked to implement and transition to integrated, technology-enabled intake and case management for WIOA and its partner programs. This initiative will need state assistance as indicated above.</p>

²¹42 U.S.C. §12101

LOCAL BOARD FUNCTIONS AND RESPONSIBILITIES

Function	Comment
Select career services providers through contract awards, if the services are not delivered by the one-stop operator.	<p>The local elected official(s) and the local board select the one-stop operator and specify the operator's responsibilities. If the one-stop operator does not provide the career services, then the services must be contracted. The service providers are selected by the local board.</p> <p>This is a local plan requirement. The plan must identify the type and availability of adult and dislocated worker career services that will be offered in the local area.</p> <p>To make sure quality career services are provided, local boards must describe how they will invest in the continuous improvement of their service providers and assure compliance with the ADA.</p>
Deciding to provide framework services for youth.	<p>Youth services must be procured. However, grant recipients and sub-grant recipients, which may be the governmental unit or the local boards, can provide recruitment, eligibility determination and case management services.</p> <p>There are 14 required youth elements most of which are not part of the framework services. They must be procured and the providers are selected by the local board.</p>
ITA's may be combined with the framework services. Under WIA a waiver was necessary to provide out-of-school youth with an individual training account, however, under WIOA, a waiver is not needed.	
Select and terminate youth providers.	<p>Finding performing youth providers can be difficult. WIOA allows for sole source procurement where the local board determines there are insufficient local providers.</p> <p>This is a local plan requirement. The type and availability of youth providers must be described in the plan. Decisions related to sole source procurement should also be described in the plan.</p>
Youth providers must be competitively selected based on recommendations of the youth standing committee if one is established. If there is no youth committee then the board acts in place of the committee.	
Work with the state to ensure there are sufficient numbers and types of career services and training providers.	<p>The state has ultimate authority for including training providers on the statewide list. However, it is the local workforce board and staff that know which career services are needed in their area and which schools are performing. Local boards can make recommendations to the governor on the procedure to determine provider eligibility and report on performing and non-performing training providers.</p> <p>This is a local plan requirement. An analysis of the workforce development activities, education and training in the region, and a description of how education and workforce activities will be coordinated is a part of the strategies to be included in the local plan.</p>
Ensure customer choice in the selection of a training provider from the approved state-wide list.	<p>While one-stop systems can require that adult and dislocated worker participants have the necessary qualifications for training, they are also charged with making sure that participants can make an informed choice when selecting their training provider. This is done by publishing training provider performance and other information that will help participants make good choices.</p> <p>This is a local plan requirement. A description of how informed customer choice in selection of training will be assured must be in the plan.</p>
Local boards can coordinate with the core partners in making determinations regarding providers approved to be on the list.	

LOCAL BOARD FUNCTIONS AND RESPONSIBILITIES

Function	Comment
Approve eligible training providers and assist the state with the vetting process for determining, renewing and terminating the eligibility of training providers.	<p>Local boards are often more familiar with local training providers and the courses they offer than the state. The state-wide list of eligible training providers is made available to participants, stakeholders and employers through the one-stop system. In addition to criteria set by the state board, the local board may develop its own criteria applicable to the eligibility of local training providers, including setting higher levels of performance than required by the state. When removing providers from the list, local boards must make an appeal process available for the providers.</p> <p>This is a local plan requirement. The plan is required to chart out and guide the actions of the local board. One of those requirements is deciding on the services that will be offered to participants. The plan must spell out how training services will be provided, whether contracts for training will be used, and how training contracts will be coordinated with individual training accounts.</p>
Review AEFLA provider applications to assure they are consistent with the local plan.	The process for reviewing adult literacy provider applications is a new responsibility under WIOA.
Implement cooperative agreements between the local board and the core and one-stop partners to enhance services for jobseekers, workers and employers.	<p>This function will require the intervention of the state as it applies to those workforce programs and funding streams that are controlled at the state level.</p> <p>This is a local plan requirement. The plan must identify strategies for coordinating with the core partner programs in the one-stop and describe the roles and resource contributions of the one-stop partners.</p>
Leverage local resources and capacity, solicit and accept grants and donations from non-federal sources.	There will never be sufficient federal funds to address all of the nation's workforce needs. Many local boards have developed ingenious ways to leverage funds and increase services. Not all boards may seek out grants and non-federal donations. Some boards may decide to offer services on a fee basis. These options are open to local boards.
Incorporate and operate as a not-for-profit organization.	Some boards incorporate others do not. This is not a requirement. Incorporation establishes the board as a separate legal entity.
Hire staff.	Where boards are separately incorporated and board staff is not employed by the local governmental unit, boards typically hire staff. The staff can function as the administrative entity and fiscal agent. Staff is subject to salary caps.
Provide training services.	<p>This is a local plan requirement. The plan must describe the organization responsible for the various governance components and how service delivery providers will be selected.</p> <p>Local boards may only provide training services with the approval of the governor. Some local boards are created under the umbrella of, or are staffed by, an educational institution such as a community college. There are other instances as well where boards wish to be a training provider. If approved to provide training, the local board would have to disclose any inherent conflict to prospective participants.</p>

There are a myriad of additional decisions which will come before the local boards in their development and implementation of strategies to meet the employment and skill needs of workers and employers including:

- Whether to implement pay for performance contracts for the 14 youth elements, youth and/or adult training contracts. There is a cap on this expenditure of 10 percent of the local allocation;
- Transfers between the adult and dislocated worker funding streams need the governor's approval;
- Setting the adult priorities for receipt of services as a part of the four-year plan;
- Determining occupations in demand as this list is used to determine allowable courses of training;
- Deciding whether to award class-size training contracts in addition to the individual training accounts;
- Deciding on the criteria for increasing employer On-the-Job Training wage reimbursements from 50 percent to 75 percent;
- Deciding to use up to 20 percent of the local allocation for incumbent worker training, and setting the amount of the employer-required contribution;

- Deciding to use 10 percent of the adult/dislocated worker allocation for transitional jobs;
- Deciding on the types of investments in employer services which will be executed in collaboration with the one-stop system;
- Deciding on the types, mix and investments in services and training; and
- Deciding which support services to offer and how much to allocate to support for participants.

As can be seen from the detail of the functions and decisions assigned to local boards, it is evident that they have been given the tools to make a real difference in their communities. After the basic needs of food, clothing and shelter, people need jobs and frequently identify themselves by what they do for a living. Local workforce development boards can make workforce services available to help enrich their residents and citizens connecting them with work, increasing their earning power and simultaneously meeting employer needs for skills and workers. This is the vision of WIOA.



THE ONE-STOP CAREER SYSTEM



The one-stop career system is the heart of the workforce development system. The law provides the window dressing for the main event, which is the creation and continuation of the one-stop system branded by the US Department of Labor as America's Job Centers. People, whether they have a job and are just looking for a new job, are out of work and need a job, want to get additional skills to make themselves more competitive in the job market, or want a better job, will most likely access the one-stop career system during the course of their work history. Employers will access the one-stop career centers to the extent they believe they can fill their need for skilled employees. This is the mission assigned to the states, local elected officials, local boards and one-stop partners: to create the "go to" system for jobseekers, workers, and employers. The one-stop system currently does and will continue to provide access to:

- Job search, placement, recruitment, and labor exchange services;
- Training services;
- Employment and training activities;
- Programs and activities carried out by one-stop partners; and
- Employer services.

WIOA, similar to WIA, requires that there be one physical one-stop career center in every local workforce area. The local elected officials and local board determine how many additional full service, affiliate or satellite centers are needed and can be afforded. The governor is charged with providing guidance after consulting with chief elected officials and the local board on how the infrastructure of the one-stop will be equitably funded by the core and mandatory one-stop partners.

THE MANDATORY ONE-STOP PARTNERS

THE WIOA ADULT, DISLOCATED WORKER, AND YOUTH FUNDING STREAMS

WIOA is the nation's primary workforce development legislation. The three workforce funding streams constitute a core one-stop partner.

THE WAGNER-PEYSER ACT OF 1933

This is the national labor exchange or Employment Service. Wagner-Peyser is considered a core one-stop partner.

THE ADULT EDUCATION AND FAMILY LITERACY ACT (AEFLA)

Re-authorized by WIOA, AEFLA is considered a core one-stop partner. Funds literacy, English as a second language and General Education Degree classes.

THE REHABILITATION ACT OF 1973

Amended by WIOA with respect to Vocational Rehabilitation (VR). VR provides employment and training services to individuals with disabilities among many other services. VR is a core partner.

TITLE V OF THE OLDER AMERICANS ACT

Reauthorized in 2015. Provides for the Senior Community Service Employment Program.

THE CARL PERKINS CAREER AND TECHNICAL EDUCATION ACT OF 2006

Perkins supports career and technical education and prepares students for post-secondary education and the careers of their choice.

THE TRADE ACT

Provides job training, income support, and other employment-related benefits to American workers displaced by the forces of globalization.

COUNSELING, TRAINING AND PLACEMENT FOR VETERANS

Title 38. Veterans' benefits. Part III. Readjustment and related benefits. Chapter 41. Job counseling, training, and placement.

COMMUNITY SERVICES BLOCK GRANT (CSBG)

Provides low-income individuals with emergency support, weatherization, employment and training and other services.

HOUSING AND URBAN DEVELOPMENT (HUD) EMPLOYMENT AND TRAINING PROGRAMS

Employment and training programs for low-and very low-income persons living in HUD-assisted housing. Not available in all communities.

STATE UNEMPLOYMENT COMPENSATION PROGRAMS

Provides assistance to workers who have lost their jobs.

EX-OFFENDER PROGRAMS UNDER THE SECOND CHANCE ACT OF 2007

Provides support strategies and services to reduce recidivism by improving outcomes for ex-offenders.

PERSONAL RESPONSIBILITY AND WORK OPPORTUNITY RECONCILIATION ACT OF 1996

Provides for the Temporary Assistance to Needy Families (welfare).

A review of the above funding streams tells us that all the one-stop partners provide employment and training services or support to individuals needing those services. The one-stop core partners, as well as the mandatory partners must provide access to their services through the one-stop system. They must also contribute to the infrastructure of the one-stop. It is not enough for an organization to want to co-locate in the one-stop center or even to agree to contribute to the infrastructure. They must also participate in the memorandum of understanding between the partners which is required by WIOA.

THE ONE-STOP MEMORANDUM OF UNDERSTANDING

Congress believes in the one-stop career system which cut its teeth during the recession of 2006. But Congress believes the system can do better. Congress envisions a one-stop system where individuals are assessed once and workforce partners share information and bundle services to meet the needs of the individual. Congress singled out those one-stop partners with the lion's share of federal funds and/or responsibility for meeting workforce needs in their communities and identified them as core or mandatory one-stop partners.

The one-stop system, while not an exclusive club, still requires organizations to be approved by the chief local elected official(s) and the workforce board. That approval carries with it the requirement for dues in the form of real contributions to the infrastructure of the one-stop and coordination with all the one-stop partners. To memorialize the understanding between the one-stop partners, they are required to enter into a memorandum of understanding (MOU) with the local workforce development board which stipulates to:

- The services the partner will provide through the one-stop delivery system;
- How each one-stop partner will provide access to and coordinate its services, through the one-stop system cross referring participants as appropriate;
- How they will contribute to the cost of operating the one-stop and its infrastructure;
- The duration of the MOU which must be reviewed and renewed every three years;
- Procedures for amending the MOU; and
- Any other provisions agreed by the parties;

It will be the responsibility of the one-stop operator to coordinate among and between the one-stop partners in accordance with the MOU.

THE ONE-STOP CAREER SERVICES ²²

Basic career services are available to everyone. The services most frequently associated with the one-stop system are the labor exchange services made possible through the Wagner-Peyser Act. Under WIOA the employment service staff delivering labor exchange services are required to be co-located in the one-stop physical center(s). WIOA also provides for management of the employment service staff in the one-stop career center by the one-stop operator to further the coordination and cooperation between the labor exchange services and the adult, dislocated worker and youth services. Labor exchange and career services funded by the Wagner-Peyser Act and WIOA include the below listed services:

- Orientation to information and services available through the one-stop;
- Labor market statistics -- local, regional, and national;
- Information on in-demand industry sectors and occupations; and
- Information on non-traditional employment.
- Information on skills necessary to get a job or get a promotion in a demand occupation;
- Information on support services, referral to child care, child support, Medicaid, The Children's Health Insurance Program, Supplemental Nutrition and Assistance Program, Earned Income Tax Credits, welfare (TANF), and transportation;
- Performance and cost information for training by program and provider;
- Information about local workforce area performance;
- Information about performance for the local one-stop system;
- Job vacancy listings;
- Outreach and intake;
- Job search, which is a basic labor exchange service;
- Job placement assistance which is a basic labor exchange service;
- Help filing Unemployment Compensation claims by on-site staff trained in filing claims;²³
- Worker profiling and reemployment services for those about to exhaust their unemployment insurance benefits;
- Career counseling;
- Initial assessment of literacy, numeracy, and English proficiency, aptitudes, abilities skills gaps and support services needs;

²²29 U.S.C. §3151 (2015) WIOA §134(c) (2) 29 CFR §678.430

²³This is a new career service. It can be provided by individuals funded through the unemployment compensation system, Wagner-Peyser, or other one-stop partner staff trained to provide assistance, but only merit staff can answer questions, provide advice, or make decisions affecting claimants' unemployment compensation eligibility.

- Referral and coordination of activities to other programs within and out of the one-stop system;
- Eligibility determination for the adult, dislocated worker, and youth programs; and
- Assistance in establishing eligibility for non-WIOA funded financial aid for education and training programs.

The above services are generally provided by Wagner-Peyser or WIOA funded staff. Wagner-Peyser and WIOA funds are used to fund what is often referred to as front-door services in the one-stop career centers. Every full service one-stop center has a resource area with rows of computer banks, phones, faxes, and copy machines available to the public. Some resource rooms include Wi-Fi and hot spots that allow people to connect to the system of services from their own devices. The resource area has staff available to provide minimal assistance and guidance to people who want to access the self-help services, from updating a resume to crash courses in interviewing skills. Many people come into the one-stop centers, register for Wagner-Peyser labor exchange services and are able to get the help they need in the resource rooms without individualized assistance.

The difference between the basic labor exchange services and the WIOA-funded adult and dislocated worker services is that the basic career services are universally available to any one-stop customer. WIOA offers individualized services to adults over 18 on a priority basis and to dislocated workers. WIOA is a “work first” piece of legislation, meaning individuals who have the skills to get a job with a self-sufficient wage will be directed to do so. But for those who do not meet that description many services are available to help connect them with a job.

The WIOA priorities are defined by the local board and chief elected officials in their four-year plan as well as in the law. WIOA has identified the unemployed, those with barriers to employment, including the long-term unemployed, and the underemployed,²⁴ as meeting the priority for services and training. Training is also provided to dislocated workers. Adult and dislocated worker participants enrolled in the program may receive everything from job counseling to training, support, placement assistance and follow-up services. Under WIA and WIOA, returning veterans and their

spouses have been given a special preference or priority for receipt of services to ease their transition back to work.

Today, with technology and new software constantly available in the online marketplace, the universal population can access many free options in the one-stop centers together with the priority populations. Often workshops and computer-based instruction in areas such as those listed below are available to everyone:

- Short-term pre-vocational training consisting of communication and interviewing skills;
- Workforce preparation activities for the acquisition of basic academic skills to be able to transition into and complete post-secondary education, or training;
- Critical thinking skills, digital literacy skills, self-management skills and financial literacy services; and
- English language acquisition.

Persons meeting the priorities or eligible as dislocated workers will receive a comprehensive assessment, diagnostic testing, in-depth interviews and evaluations to identify employment barriers, career pathways and goals. They will receive counseling to determine their career achievement objectives, and an individual employment plan will be created listing the combination of services they will receive, which may include training and support services, so they can meet those objectives. Sometimes one on one services, prevocational training, an internship or a work experience will be enough to get someone on the road to gainful employment. For others, additional services such as training are needed. Training may only be in occupations in demand. It would not make sense to train workers for jobs that are obsolete.

TRAINING

WIOA training is for occupational skills, occasionally coupled with literacy skills and is generally provided through an Individual Training Account (ITA), which is like a scholarship. Every local area decides on the amount or value of the ITA that will be offered to participants. Participants may combine an ITA with a PELL²⁵ grant to pay for tuition and living expenses. Sometimes the ITA, even when combined

²⁴29 U.S.C. §3102, WIOA §3(24) Underemployed individuals include the working poor, persons with barriers to employment, the part-time employed, workers in a position that requires skills below their level of accomplishment, or where they are earning less than in their previous position, in accordance with a local or state policy.

with a PELL grant, may not be sufficient to pay for 100 percent of the tuition. Case managers try to make sure that participants can put together a budget, which may include a job and/or a student loan that will cover 100 percent of the tuition before they allow a participant to enroll in a course of study. Local WIOA performance is partially graded upon the completion rate of those persons enrolling in training and their attainment of the related credential. The budget is one of the considerations in being able to complete training. If a local area is part of a planning region, the regions may need to agree on the amount of the ITA's to provide consistency throughout the region.

Participants can take their ITA to any training provider who has been approved by the state to be included on the eligible training providers list (ETPL), so long as the participant has the qualifications to be successful in the training selected. There is no inherent right to a particular course of study or to any WIOA-funded service. Schools often refer their applicants to the one-stop career centers for financial assistance. However, the individual needs to be WIOA eligible, the local area needs to have the funds available, and the individual's assessment will need to substantiate that they have the foundation, literacy and numeracy skills to be able to successfully complete the coursework before they are approved for the training. To meet the legislative customer choice requirements, the participants will also be provided with the list of all the schools offering the same or similar course of study and the performance information about the school and training course. This not only assists in customer choice it also makes for an informed decision.

Schools apply to be on the ETPL list at the local level and must receive state approval. Each course of occupational skills training must be separately approved. Not every course of training offered by a post-secondary school, college or university will be approved to be on what is referred to by the one-stop career centers as the ITA list. WIOA is not responsible for filling school classrooms. If a course of study does not result in successful completion, attainment of the credential and placement into an unsubsidized job, then the course of study, the school or both may be removed from the ETPL and/or ITA list.

The lists include courses which prepare participants for high wage, in-demand occupations around the state and in the local area as well as registered apprenticeship programs.

Once approved for the ITA, participants are directed to enroll as they would in any post-secondary school or college.

If the local board determines that there are an insufficient number of eligible providers of training services and there is a demand for a particular skill, they may enter into a contract for class-size training. Training can be provided through a contract for a local training program of demonstrated effectiveness or that can best be provided by an institution of higher education, a community-based organization or a private entity. Contracted class-size training is one of the exceptions to the requirement that training be delivered through an ITA. Usually class-size training will be subject to the procurement requirements applicable to federal grants before the local board can enter into the contract.

There are other exceptions to training provided through an ITA. Many local boards refer to the other categories of training as the employer-based or work-based training options, because the training is provided at the worksite, the curriculum is provided by the employer, or both. In these instances, the employer often works with the one-stop career center staff to identify potential trainees making the likelihood of placement and/or retention after training very high.

WORK-BASED TRAINING OPTIONS

ON-THE-JOB TRAINING (OJT)

This is a hire first option. The employer hires the participant as a part of their regular workforce and provides training to the individual while they are on the job. The employer is reimbursed 50 percent of the participant's wage during the training period. Reimbursements may be increased to 75 percent depending upon local and state policies. OJT may also be offered to employers who participate in registered apprenticeship programs.

OJT is an allowable training option for upgrading the skills of the employer's existing workforce. It is targeted at employees who are not earning a self-sufficient wage as defined by the local board. The upgrade OJT would need to relate to the introduction of new technologies, production or service procedures, a new job that requires additional skills, workplace literacy, or for other appropriate purposes pursuant to local board policy.

²⁵20 U.S.C. §1070

OJT may also follow an ITA helping the participant to be placed and gain the experience they may need to complete the skills acquisition sought by the employer.

CUSTOMIZED TRAINING

This is training with a commitment from an employer or group of employers to hire those individuals who successfully complete training. Customized training may be offered to employed workers who are not earning a self-sufficient wage. The employer must contribute to the cost of the training pursuant to local board policy.

Customized training differs from OJT in that WIOA is paying for training as opposed to reimbursing the employer for a portion of the wage.

INCUMBENT WORKER TRAINING

This is training for workers who have been employed by their employer for at least six months. The state and local boards are charged with establishing policies for incumbent worker eligibility. The workers do not need to meet traditional WIOA adult or dislocated worker eligibility.

The training must add to the competitiveness of the employee or the employer. Incumbent worker training is meant to assist employers in retaining a skilled workforce or to avert a layoff. Local boards may negotiate with the employers to fill the vacancies that occur as trained individuals are promoted with WIOA-eligible adults or dislocated workers. This is referred to as “backfill.”

Employers must contribute to the cost of the training. Local areas may not spend more than 20 percent of their program year formula adult and dislocated worker allocations on incumbent worker training.

INTERNSHIPS AND WORK EXPERIENCE LINKED TO CAREERS

This is training at the workplace where the participant receives a planned structured learning experience for a limited period of time. It may be paid or unpaid, as appropriate, in the private-for-profit, public or the non-profit sector. Where an employee/employer relationship exists the work experience will be subject to the Fair Labor Standards Act requirements.

TRANSITIONAL JOBS

This is a new training option under WIOA. It is a time-limited work experience that is provided in conjunction with job-readiness training, adult education and literacy including English language acquisition, and integrated education and training. Transitional jobs are for low-income barriered individuals so that they may establish a work history, demonstrate success in the workplace and develop skills that can lead to a job. Local areas are limited to 10 percent of their adult and dislocated worker formula allocations for this activity.

ENTREPRENEURIAL TRAINING

There are many roads to self-sufficiency and for some people it is self-employment. During each recession we see laid-off workers who want to control their job future by going into business for themselves. Many adults and youth have entrepreneurial aspirations but do not have the tools to set up and operate a business. WIOA allows for entrepreneurial training to make these individuals more competitive in the workforce and to equip them with the skills necessary for successful self-employment.

COMBINED OR SEQUENTIAL TRAINING

WIOA allows local boards to provide participants with combined and sequential training that includes more than one training option. An example would be programs that combine workplace training with related instruction, such as cooperative education programs. It is up to the local board to establish policies in this regard.

FOLLOW-UP

While follow-up is not a training strategy, when a participant is placed into unsubsidized employment following individualized services, one-stop case managers will follow-up with the participant for 12 months after their exit from the program. This is to make sure the participant has stabilized in their employment and no longer needs additional assistance as well as to provide encouragement, support services or re-placement if needed.

YOUTH PROGRAMS



YOUTH SERVICES

Just as there are career services for adults and dislocated workers, WIOA provides for services for in-school youth aged 14–21,²⁶ and services for out-of-school youth aged 16–24 years of age. The four big changes in WIOA youth services are: 1) the definition of an out-of-school youth as being up to 24 years old; 2) the emphasis on services to out-of-school youth. WIOA requires that 75 percent of the youth allocation be spent on out-of-school youth as opposed to the 30 percent expenditure requirement under WIA; 3) the relaxed eligibility requirements as it relates to documentation collection to certify low income; and 4) the requirement that a minimum of 20 percent of the youth allocation be spent on work experience activities.

IN-SCHOOL/OUT-OF-SCHOOL YOUTH

IN-SCHOOL YOUTH

WIOA defines an in-school youth as a youth between the ages of 14 and 21 who is attending school as defined by state law, is low income and has one of the barriers listed in the legislation. However, whereas under WIA a parent had to provide proof of income to certify low income for purposes of WIA eligibility, an in-school youth may be determined as low income if they are receiving free or reduced lunch,²⁷ or if the youth is living in a high-poverty area.²⁸ This means that low income for most youth will not require the youth to bring any documentation regarding their low income status as their address will be on file with their schools and the school will have the record of whether they are receiving a free or reduced lunch.

Many local areas were heavily invested in prevention under WIA and had large in-school youth programs. Except in the larger metropolitan areas with large WIOA formula allocations for youth, the in-school programs are likely to be small as they are limited to 25 percent of the youth funds. Even in large urban areas many of the in-school youth programs will be smaller than they were under WIA.

One way to keep serving in-school youth will be to leverage the WIOA dollars and for local areas to partner with other workforce agencies and organizations serving youth. An example would be to partner with Vocational Rehabilitation. The WIOA amendments to the Rehabilitation Act of 1973

now require Vocational Rehabilitation agencies to spend 15 percent of their funds statewide helping youth with disabilities transition from high school to post-secondary school. Disabled youth are considered a family of one for purposes of determining low income and their disability is considered a barrier. As a result, most youth that have a disability are WIOA eligible. Another change under WIOA that makes it easier to work with disabled youth, is that they are no longer required to receive a traditional high school diploma for purposes of meeting performance as was the case under WIA. This makes a partnership with Vocational Rehabilitation beneficial to both funding streams. Vocational Rehabilitation can fund job coaches, support services and training. WIOA providers can offer employability skills and placement into unsubsidized employment or into post-secondary school.

Welfare is another federal workforce funding stream that can easily partner with WIOA- eligible in-school youth. An allowable welfare expenditure is an activity which furthers the four purposes of welfare, one of which is to keep people from needing to receive welfare. Targeting youth who have characteristics that make them at risk of needing welfare services in the future would be an allowable welfare expenditure. In many states, welfare funds are already coupled with workforce funds to provide a summer work experience to youth.

Many of the school systems around the country have alternative schools for youth who are not succeeding in the regular classroom. Partnering with some of the Department of Education funded-programs will help to leverage WIOA funds. Local communities with after-school programs operated by community-based organizations are also likely partners in serving WIOA in-school youth.

OUT-OF-SCHOOL YOUTH

Out-of-school youth can be divided into two groups;

GROUP ONE

A youth between the ages of 16 –24 who is not attending school as defined by state law and has any one of the below-listed characteristics:

- Is a high school dropout;

²⁶20 U.S.C. §1070

²⁶A youth who is disabled may be older than 21 if they are attending school in accordance with state law WIOA 129(a)(1)(C)

²⁷Richard B. Russell National School Lunch Act 42 U.S.C. §1751 et seq.

²⁸A high-poverty area is a Census tract, a set of contiguous Census tracts, Indian Reservation, tribal land, or Native Alaskan Village or county that has a poverty rate of at least 30 percent as set every 5 years using American Community Survey 5-Year data 20 CFR 681.260

- Is within the age of compulsory attendance but has not attended school for the last complete school year quarter prior to being determined eligible;
- Has been subject to the juvenile or adult justice system;
- Is considered homeless in accordance with WIOA;
- Is a youth in foster care, eligible for foster care in an out-of-home placement, or has aged out of foster care;
- A runaway;
- Pregnant or parenting; and
- Has a disability (the youth is considered a family of one for purposes of income determination).

Any youth who has any of the above characteristics is not required to present documentation of “low income” status to be eligible and participate in the program.

The United States Department of Labor has provided further guidance stating that a youth enrolled in a General Education Degree (GED) program is considered to be an out-of-school youth. Many states have already defined a youth in a GED program as a dropout. This makes an alignment between the AEFLA providers and WIOA to serve youth enrolled in a GED program a winning coordinative combination. AEFLA can provide the youth with academic skills. WIOA can provide youth with a work experience, employability skills, and placement into unsubsidized employment or post-secondary school, resulting in successful attainment of the federal performance goals for both funding streams.

GROUP TWO

A youth between the ages of 16-24 who has a high school diploma or GED, and is low-income, and:

- Is not attending school as defined by state law, and is basic skills deficient, which means that they are scoring below an 8.9 grade level in English or math on a nationally accepted assessment such as the Test Of Adult Basic Education (TABE); or

- Is not attending school as defined by state law, and is an English-language learner. An English-language learner is a youth who has limited ability in reading, writing, speaking, or comprehending the English language, and whose native language is not English, or who lives in a family or community where a language other than English is the dominant language;²⁹ or
- Is not attending school as defined by state law and requires WIOA assistance to enter or complete an educational program or to secure employment; or
- Requires WIOA assistance to enter or complete an educational program or to secure employment as defined in accordance with local board policy. The definition is applied in determining a youth’s eligibility.

YOUTH SERVICES

Youth services include assessment, development of an individualized service strategy including identification of a career pathway and career plan, activities leading to the attainment of a secondary-school diploma or its credential, preparation for post-secondary education and training, post-secondary training leading to attainment of a recognized post-secondary credential, and preparation for unsubsidized employment.

Youth services must be delivered by competitively procured providers unless the local board has determined that there are insufficient performing providers available in the local area and can thereby justify a sole-source procurement. Requests for proposals (RFPs) should specify that proposed program services must support attainment of a high school diploma or its equivalent, entry into post-secondary education, and career readiness.

Local workforce development boards must make sure that the 14 required WIOA elements are available as needed by the youth. They can be provided as a part of the program design offered by proposing providers or may be contracted for and offered to the youth on a one-by-one referral basis through a variety of providers.

²⁹WIOA Title II AEFLA Sec 203[7]

THE 14 REQUIRED WIOA YOUTH ELEMENTS

- 1 Tutoring, study skills training, instruction, and evidence-based dropout prevention and recovery strategies that lead to completion of the requirements for a secondary school diploma or its equivalent including a recognized certificate of attendance or similar document for individuals with disabilities, or for a recognized post-secondary credential.
- 2 Alternative secondary school services, or dropout recovery services.
- 3 Paid and unpaid work experience that has as a component academic and occupational education, such as (i) school year and/or summer employment, (ii) pre-apprenticeship programs, (iii) internships and job shadowing, and (iv) on-the-job training.
- 4 Occupational skill training leading to recognized postsecondary credentials aligned with in-demand industry sectors or occupations in the local area.
- 5 Education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster.
- 6 Leadership development opportunities, which may include community service, and peer-centered activities encouraging responsibility, and other positive social and civic behaviors.
- 7 Support services.
- 8 Adult mentoring while a youth is in the program and for 12 months after they exit the program.
- 9 Follow-up services for 12 months after the completion of participation.
- 10 Comprehensive guidance and counseling, which may include drug and alcohol abuse counseling and referral, as appropriate.
- 11 Financial literacy education.
- 12 Entrepreneurial skills training.
- 13 Services that provide labor market and employment information about in-demand jobs such as career awareness, career counseling, and career exploration services.
- 14 Activities that help youth prepare for and transition to post-secondary education and training.

Regardless of the combination or sequence of services, youth can only benefit if they participate. The challenge for youth providers is engaging the youth, especially out-of-school youth.

A large portion of out-of-school youth who are not working — those often referred to as “disconnected” or “opportunity” youth — are involved to some extent with public systems, such as welfare services, foster care, and the juvenile or criminal justice systems. They often seek services from community-based public and private organizations. In recent MDRC evaluations, including a national evaluation of YouthBuild, youth training and employment programs have reported partnering with community-based providers such as child welfare agencies, social service organizations, group homes, probation or parole officers, and even the local schools, to “catch” at-risk young people before they become disconnected.

While a majority of the out-of-school youth seek out opportunities to connect to training and work, youth programs often report difficulties in sustaining participation after the initial connection is made. WIOA-funded service providers will not only have to reach more out-of-school youth, they will also need strategies to stimulate sustained, intense engagement in services.³⁰

Local youth committees making funding recommendations to local boards will have to carefully examine proposals to see if the proposed strategies are likely to engage the youth and keep them attending until completion of their objectives.

³⁰Serving Out-of-School Youth Under the Workforce Innovation and Opportunity Act (2014) Farhana Hossain
MDRC, June 2015

PERFORMANCE



The WIOA performance measures apply to the four core programs:

- The WIOA adult, dislocated worker and youth programs and activities;
- Adult education and literacy activities;
- Wagner-Peyser Act-employment services; and
- Vocational Rehabilitation.

By coordinating and allowing each funding stream to do what they do best, all four core partners may see a benefit in better performance for their programs. The federal performance measures are very important to local boards and their chief elected official(s). If a local board misses the same performance measure two years in a row, they will lose their right to be automatically designated in the immediately subsequent designation period and can be reorganized, merged into another area, or be otherwise sanctioned at the pleasure of the governor.

The adult/dislocated worker federal performance measures are:

1. PLACEMENT

The percentage of participants in unsubsidized employment in the second quarter after they exit from the program.

2. RETENTION

The percentage of participants in unsubsidized employment during the fourth quarter after they exit from the program.

3. WAGE

The median earnings of participants in unsubsidized employment the second quarter after exit.

4. CREDENTIAL ATTAINMENT

The percentage of participants who obtain a post-secondary credential, or a high school diploma or GED during participation or within one year after exit who are also placed in an unsubsidized job or go into post-secondary training.

5. MEASURABLE PROGRESS

The percentage of participants in an education or training program leading to a post-secondary credential or employment and who are achieving measurable skill gains toward such a credential or employment.

6. THE EMPLOYER MEASURE

The indicators of effectiveness in serving employers. This measure will be developed by the Secretaries of Labor and Education.

To calculate each measure, the US Department of Labor will issue guidance on how the numerator and denominator are determined.

Under WIA most states had a waiver to be measured using the three common measures developed by the US Department of Labor. They were placement, retention and wage. Under WIOA there are now six measures for all the core partner programs. The measures apply to all four core programs but there will be a different baseline negotiated with each of the core partners. The education measures will not apply to Wagner-Peyser labor exchange programs because they do not offer participants educational options.

In addition to the new measures, there are some other changes under WIOA. First, the measure for placement and wage will not be counted until the second quarter after a participant exits the system. Second, rather than use an average for the wage measure, the core partners will be measured using the median wage of all the participants in the cohort being measured. Third, the employer measure is still unknown.

The measures for WIOA youth are the same as they are for adults but the components of how they are calculated vary in some cases from the core partner measures. The youth performance measures are:

1. PLACEMENT

The percentage of participants in education, training or unsubsidized employment, during the second quarter after exit.

2. RETENTION

The percentage of participants in education, training or in unsubsidized employment, the fourth quarter after exit.

3. WAGE

The median earnings of participants in unsubsidized employment the second quarter after exit.

4. CREDENTIAL ATTAINMENT

The percentage of participants who obtain a post-secondary credential, a high school diploma or GED during participation or within one year after exit, who are also placed or go on into post-secondary training.

5. MEASURABLE PROGRESS

The percentage of participants in an education or training program leading to a post-secondary credential or employment and who are achieving measurable skill gains toward such a credential or employment.

6. THE EMPLOYER MEASURE

The indicators of effectiveness in serving employers to be developed by the Secretaries of Labor and Education.

The state negotiates the performance measures with the Secretary of Labor for the WIOA adult, dislocated worker and youth funding streams. Then the governor negotiates with each of the local workforce development areas in the state. States cannot veer too far from the measures negotiated with the federal government when negotiating with local areas or they risk failing the overall negotiated state measures. Under WIOA states may be sanctioned for failing their performance measures.

In addition to reporting on the measures, WIOA requires the states to report on a myriad of other elements. Some of the more significant information WIOA directs the states to report to the US Department of Labor are:

- The total number of participants served by each Core program;
- The number of participants who received career and training services, during the most recent and the preceding program years, and the amount of funds spent on each type of service;
- The number of participants who exited from career and training services during the most recent program year and the preceding program years;
- The average cost per participant who received career and training services, respectively, during the most recent program year and the three preceding program years;
- The percent of participants who received training services and obtained training related jobs;
- The number of participants with barriers to employment served by each core programs by each subpopulation;

- The number of participants enrolled in more than one core program;
- The percent of the state's annual allotment spent on administrative costs.

Congress is also asking for performance information from the eligible training providers including:

- The total number of students who exit from the programs of study;
- The total number of participants who received training by funding stream, and type of entity providing the training;
- The average cost per participant for those who received training by the type of entity that provided the training; and
- The number of individuals with barriers to employment served by each funding stream and by each subpopulation and by race, ethnicity, sex, and age.

This information will help local areas better target training funds to performing schools and effective courses of training.

Conclusion

WIOA does not consolidate or integrate workforce programs. The expectation is that the states and local boards will work on coordinating, integrating and leveraging their workforce resources to create a comprehensive workforce system. To accomplish this state and local boards have expanded functions and flexibility. By allowing states to organize local areas into regions smaller areas may eventually merge or be consolidated by working through a regional planning process that requires agreement by all the areas on policies and deployment of services.

The unified planning process allows governors to make access to the core partners' workforce services seamless to the users. By aligning the core partners' performance measures, there is a strong incentive for the core partners to work together to achieve their performance objectives. Because WIOA requires the core and mandatory one-stop partners to financially contribute to the one-stop center operations, there is an inducement to co-locate and by co-locating become familiar with each other's services and share information. Job seekers will get the combination of services they need to be successful and employers will be engaged because they can find the workers they need.

In each of the states and in each of the one-stop centers it will be up to the partners to determine how successful their workforce system will be in serving their customers.



A WORD FROM THE AUTHOR

I hope that local elected officials, board members and their staffs find this guide helpful in navigating the Workforce Innovation and Opportunity Act of 2014. Writing the guide gave me the opportunity to think of all the ways in which the workforce system makes a difference in people's lives. When I was asked by the Workforce Development Council to take on this task, it gave me a chance to share the knowledge and expertise acquired as an attorney working inside the workforce system over the course of my career. It was my pleasure to be able to contribute in this small way to the workforce programs of the states and localities throughout our great United States. I would also like to thank the CareerSource Broward Council of Elected Officials and the Broward Workforce Development Board, Inc. for allowing me the time to produce this guide and the CareerSource Broward staff that often raise workforce issues that require me to think about practical solutions. Finally, this took a little time to write so I would like to thank my husband who says he often lives alone when I am just in the other room on the computer.





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Tel: 202.293.7330
Fax: 202.293.2352



RECORD OF ACTION/APPROVAL

Consortium Meeting Friday, February 28, 2020

TOPIC/ISSUE:

Renewal of LEO Agreement

BACKGROUND:

The current LEO agreement expires June 30, 2020. The local area's Annual Plan is due March 16, 2020 and requires an up to date Agreement between the Consortium and the CLM Board on duties and responsibilities.

POINTS OF CONSIDERATION:

The Renewal of the LEO Agreement extends the Agreement through June 30, 2025

STAFF RECOMMENDATIONS:

COMMITTEE ACTION:

BOARD ACTION:

MEMORANDUM OF AGREEMENT

BETWEEN

**THE CITRUS, LEVY, MARION REGIONAL WORKFORCE DEVELOPMENT
BOARD, INC.**

AND

**THE CITRUS, LEVY, MARION WORKFORCE
DEVELOPMENT CONSORTIUM**

THIS AGREEMENT is made and entered into between the Citrus, Levy, Marion Regional Workforce Development Board, Inc., hereinafter referred to as the **CLMRWDB**, and the Citrus, Levy, Marion Workforce Development Consortium, hereinafter referred to as the **CLMWDC**, for the purpose of establishing a Workforce Development Partnership, as authorized and provided for under Public Law 113-128, enacted by the Congress of the United States, which act is known as the "Workforce Innovation and Opportunity Act (herein after referred to WIOA), and Florida Statutes (F.S.) Chapter 445, and for the purpose of establishing an integrated management and control structure for the provision of job training, job placement and related benefits service.

WITNESSETH:

WHEREAS, the receipt and expenditure of WIOA funds authorized for certain Workforce Development Programs within local Workforce Development Areas (WDA) are dependent upon the establishment of a partnership between business and government; and

WHEREAS, the Governor on the part of the State of Florida has designated the counties of Citrus, Levy and Marion as a WDA; and

WHEREAS, the Counties of the WDA each represented by an Elected Official appointed by the governing board, have formed the **CLMWDC** through adoption of an Amended Interlocal Agreement pursuant to Florida Statutes, Chapter 163.01 to carry out these local governments' responsibilities within their collective and respective boundaries for the purpose of Workforce Development; and

WHEREAS, the **CLMRWDB**, representing business by its private sector majority, has been duly appointed by the **CLMWDC**; and

WHEREAS, the **CLMRWDB** is empowered and has the responsibility under the WIOA to provide policy guidance for, and exercise oversight with respect to, activities under a Plan for the WDA in partnership with the **CLMWDC**; and

WHEREAS, the WIOA requires the **CLMRWDB** and the **CLMWDC** to define the scope of their partnership by means of an Agreement; and

WHEREAS, the U.S. Department of Labor, has encouraged the development of a workforce development system governed by local workforce investment boards; and

WHEREAS, the purpose of these local boards is to develop local workforce development policies and strategies; to oversee the management and administration of those policies and strategies; and to develop an approach which consolidates the delivery of those workforce development strategies into a comprehensive, customer-centered system at the local level in concert with the chief elected officials of the local governments; develop broad regional plans that promote economic development through a trained workforce; and

WHEREAS, within the WDA comprised of Citrus, Levy and Marion Counties, there currently exists an effective, efficient and highly successful delivery system of federally and state-funded employment and training programs which are not customer-centered; and

WHEREAS, the programs envisioned under the control of the local workforce development boards include, but are not limited to, those funded through the WIOA, the Wagner-Peyser Act, Perkins vocational training, school-to-work transition programs, vocational rehabilitation, Job Opportunity Basic Skills Program (JOBS), Welfare to Work (WTW), Supplemental Nutritional Assistance Program (SNAP), Re-Employment Services and other workforce development programs and services;

NOW THEREFORE, be it resolved that this Agreement be made and entered into by the **CLMRWDB** and **CLMWDC** pursuant to WIOA, and that the parties mutually agree as follows:

I. Authorities and Responsibilities Held Jointly by CLMRWDB and CLMWDC

A. It is the joint responsibility and responsibility of both parties to ensure effective service delivery to provide the most beneficial program services possible to the eligible residents of the WDA. It is further the shared

responsibility of all sectors of the community to participate in the provision of program services.

B. **CLMWDC** hereby designates CLMRWDB as the grant recipient and administrative entity for the WDA for the period July 1, 2020 through June 30, 2025.

C. **CLMRWDB** and **CLMWDC** shall jointly submit an approved local Workforce Development Plan to the Governor in accordance with the provisions of the WIOA and other applicable laws. CLMRWDB shall develop, in concert with other workforce investment boards within the workforce development region prescribed by the Governor, and present to the CLMWDC, a regional workforce development plan in accordance with Section 106 (c) of WIOA, to be approved and forwarded to the Governor.

D. **CLMRWDB** and **CLMWDC** shall decide the allocation of funds for the Workforce Development Plan's Budget.

E. **CLMRWDB** and **CLMWDC** shall jointly select and approve of the One Stop Operator.

F. Because the WIA indicates that a partnership exists that requires mutual agreement on certain matters, any disputes between the partners to this Agreement shall be resolved by a mutually satisfactory negotiation. It is understood that in accordance with the WIA, the failure to resolve any dispute to the mutual satisfaction of both parties regarding the WFR's make-up, submission of the Workforce Development Plan, designation of an administrative entity and grant recipient, or **CLMRWDB's** make-up shall result in the forwarding of the unresolved matter to the Governor of the State of Florida for resolution.

II. Authorities and Responsibilities of the CLMRWDB

CLMRWDB shall:

A. Develop, review and approve the Workforce Development Plan for the WDA and the Regional Plan (WIOA, 106 (c);

B. Provide policy guidance in the development of Workforce Development activities and for the provision of services;

C. Provide oversight of Workforce Development programs, activities

and services conducted under the Workforce Development Plan;

D. Solicit the input and participation of the local business community in the development and provision of program services to eligible residents of the WDA;

E. Develop By-Laws to determine its operation;

F. Have the authority to:

1. Develop and approve a budget for itself within the parameters established in the Workforce Development Plan's provisions and WIOA Budget contained therein;

2. Select and hire a staff; and, establish criteria for its chief executive to be approved by CLMWDC;

3. Develop and prepare five year local and regional Workforce Development Plans for approval by the **CLMRWDB** and by the **CLMWDC**;

4. Provide staff support to the **CLMWDC**;

5. Collect data necessary for management and evaluation and the preparation of required and desired reports;

6. Exercise oversight with respect to activities under the Workforce Development Plan;

8. Arrange for service delivery through non-financial agreements; and contracts.

9. Procure all goods, services and property, including the maintenance and inventorying thereof, necessary for its proper operation;

10. Procure annual audits of funds and resolve any questions arising therefrom and provide copies of same, as well as an audited financial statement, to the **CLMWDC** annually;

11. Develop and maintain procedures to hear and resolve grievances;

12. Perform such other duties as are necessary to fulfill its obligations and responsibilities under this Agreement and applicable Federal and State laws, rules, policies and plans;

13. Procure director's and officer's and other liability insurance on behalf of itself and the **CLMWDC** to the extent that such insurance is available, budgetarily feasible, and allowable as an expense;

14. Provide quarterly reports to the **CLMWDC**; and

15. Remove **CLMRWDB** members for cause per procedures established by the **CLMWDC**; and

III. Authorities and Responsibilities of the CLMWDC

The **CLMWDC** shall:

A. Review and approve the Workforce Development Plans for the WDA and Regional Programs;

B. Provide public policy guidance in the development of job training activities and provision of services under the Workforce Development Plan;

C. Establish the **CLMRWDB**, appoint members to the **CLMRWDB** if such authority is delegated to individual **CLMWDC** members by their respective county commissions (absent such delegation the power to appoint CLMRWDB members from any of the three counties shall reside in the respective County commissions and the power to appoint area representatives shall reside in the three county commissions or in their respective **CLMWDC** representatives authorized to appoint members, if any) and maintain the make-up of the **CLMRWDB** in compliance with the requirements of the WIOA, F. S, Chapter 445 and other applicable laws on a continuous basis, all in accordance with the agreement which created the **CLMRWDB**; and

D. Suggest such changes in the organization, composition and management of the **CLMRWDB** or shall be desirable to best meet the needs of the citizens of the counties within the WDA.

IV. Term of Agreement

This Agreement shall become effective July 1, 2020 and shall continue in effect until June 30, 2025. Thereafter, this Agreement may be renewed by a further

writing between the parties.

V. Merger

It is understood and agreed that the entire Agreement between the parties is contained herein and that this Agreement supersedes all oral agreements and negotiations between the parties relating to the subject matter hereof. All items and other agreements referred to in this Agreement are incorporated herein by reference, and are deemed to be part of this Agreement. This Agreement replaces all prior Agreements between the parties as to the subject matter hereof as of the effective date of this Agreement.

VI. Amendment

Either party to this Agreement may propose to amend or modify the terms of this Agreement consistent with applicable Federal and State laws, Federal Regulations and State requirements, by providing to the other party sixty (60) days written notice of any proposed amendments. Any and all modifications or amendments to this Agreement are subject to the approval of both the **CLMRWDB** and **CLMWDC**.

VII. Independence of Terms Under This Agreement

If any terms or provisions of this Agreement or the application thereof to any person or circumstance shall, to any extent be held invalid or unenforceable, the remainder of this Agreement, or the application of such term or provision to such person or circumstances other than those as to which it is held invalid or unenforceable, shall not be affected thereby and every other term and provision of this Agreement shall be valid and enforced to the fullest extent permitted by law.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement on the ____ day of _____, 2019, and hereby agree to be bound by the terms and provision set forth herein effective July 1, 2020.

**Citrus, Levy, Marion Regional Workforce
Development Board, Inc.**

BY: _____
Rachel Riley, Chair

Witnesses as to CLMRWDB

**Citrus, Levy Marion Workforce
Development Consortium**

BY: _____
Commissioner Jimmie T. Smith,
Consortium Chair

Witnesses to CLMWDC



RECORD OF ACTION/APPROVAL

Consortium Meeting Friday, February 28, 2020

TOPIC/ISSUE:

Approval to Submit Interlocal extension

BACKGROUND:

The Interlocal Agreement between Citrus, Levy and Marion Counties to establish the workforce region, authorize the Citrus Levy Marion Regional Workforce Development Consortium expires June 30, 2020. The agreement enables the area to receive federal workforce, TANF and related funds to assist area residents in gaining training and finding employment.

The proposed extension will extend the agreement through June 30, 2025

POINTS OF CONSIDERATION:

. The Annual Plan for our area is due March 16, 2020 and the updated Interlocal is required to be part of the Plan

STAFF RECOMMENDATIONS:

Request approval to submit to each County Commission for action.

COMMITTEE ACTION:

BOARD ACTION:

**INTERLOCAL AGREEMENT AMENDING THE
CITRUS, LEVY, MARION WORKFORCE
CONSORTIUM AS CALLED FOR BY THE
WORKFORCE INNOVATION AND OPPORTUNITY
ACT, Public Law No. 113-128**

THIS INTERLOCAL AGREEMENT, made and entered into as provided in paragraph 12, pursuant to the authority of Section 163.01, Florida Statutes, by and between the counties of Citrus, Levy and Marion, of the State of Florida, each of which has adopted a resolution approving this Agreement.

WITNESSETH:

WHEREAS, Public Law 113-128, enacted by the Congress of the United States effective July 22, 2014, which act is known as the "Workforce Innovation and Opportunity Act" (hereinafter "WIOA") establishes a program to prepare youth and unskilled adults for entry into the labor force and to afford job training to those economically disadvantaged individuals and other individuals facing serious barriers to employment, who are in special need of such training to obtain productive employment; and

WHEREAS, the WIOA replaces the Workforce Investment Act of 1998 under which Federal job training monies were administered, and the adoption of the WIOA necessitates the amendment of the Interlocal Agreement Creating the Citrus, Levy, Marion Workforce Consortium; and

WHEREAS, the WIOA creates a partnership among state and local governments, and the private sector, with primary emphasis upon the coordination of workforce development programs; and

WHEREAS, the WIA requires the Governor to designate Workforce Development Areas (WDA) to promote the effective delivery of workforce development programs and further provides that a consortium of units of general local government may constitute such a WDA; and

WHEREAS, Citrus, Levy and Marion Counties desire to form a WDA under the WIOA for workforce development; and

WHEREAS, the Board of County Commissioners of each of the parties to this Agreement desires that its county be included in an area workforce development plan to avail its citizens of the benefits of the WIOA; and

WHEREAS, the Governor has the authority to "grandfather" the parties to this Agreement as a WDA for the purposes of the WIOA; and

WHEREAS, the WIOA requires the establishment of a Workforce Investment Board (WIB) to provide policy guidance for, and exercise oversight with respect to, activities under the Workforce program for its WDA in partnership with the units of general local government within its WDA; and

WHEREAS, it is the responsibility of the Board of County Commissioners of each County in the WDA to appoint members to the WIB in accordance with the WIOA and an agreement entered into by the Board of County

Commissioners of each County; and

WHEREAS, it is the responsibility of the WIB, in accordance with an agreement with the Board of County Commissioners of each County in the WDA, to develop a workforce development plan; and

WHEREAS, the workforce development plan must be approved jointly by the WIB and the Board of County Commissioners of each County in the WDA and thereafter be submitted to the Governor; and

WHEREAS, within the Workforce Development Area comprised of Citrus, Levy and Marion Counties, there currently exists an efficient and effective delivery system of federally and state- funded employment and training programs which are customer-centered; and

WHEREAS, Citrus, Levy and Marion Counties now desire to enter into an Interlocal Agreement to provide for the creation of a local WIB and to provide workforce development services within the WDA; and

WHEREAS, the U.S. Department of Labor, has encouraged the development of a workforce development system governed by local WIBs; and

WHEREAS, the purpose of these local boards is to develop local workforce development policies and strategies; to oversee the management and administration of those policies and strategies; and to develop an approach which consolidates the delivery of those workforce development strategies into a comprehensive, customer centered system at the

local level in concert with the chief elected officials of the local governments of the WDA; and

WHEREAS, the programs envisioned under the control of the local workforce development boards include, but are not limited to, those currently funded through the WIOA, the Florida Welfare Transition Program, the Wagner-Peyser Act, Perkins vocational training, school-to-work transition programs, vocational rehabilitation, Job Opportunity Basic Skills Program, (JOBS), Welfare to Work (WTW), Supplemental Nutritional Assistance Program (SNAP), Re-Employment Services and other workforce development programs;

NOW, THEREFORE, the parties hereto agree as follows:

1. Establishment of the Citrus, Levy, Marion Workforce Development Consortium (CLMWDC).

There is hereby established a multi-jurisdictional arrangement, the "Citrus, Levy, Marion Workforce Development Consortium" (CLMWDC) among all the parties hereto for the express purpose of collectively carrying out the individual responsibilities of each party to this Agreement under the WIA. The CLMWDC shall consist of three (3) members. The Boards of County Commissioners of each county shall each designate a member of the County Commission to serve as the County's representative on the CLMWDC.

2. Identification of Parties to this Agreement

Each of the parties to this Agreement is a county of the State of Florida,

and as such is a general purpose political subdivision which has the power to levy taxes and spend funds, as well as general corporate and police powers. The governing body of each of the parties to this Agreement is its Board of County Commissioners and each party to this Agreement is identified as follows:

NAME/ADDRESS

Board of County Commissioners
Citrus County, Florida
110 N. Apopka Ave.
Inverness, FL 34450

Board of County Commissioners
Levy County, Florida
P. O. Box 310
Bronson, FL 32621

Board of County Commissioners
Marion County, Florida
601 SE 25th Avenue
Ocala, FL 34471

3. Geographical Area to be Served by this Agreement

The geographical areas which will be served by this Agreement are the entire geographical areas of each of the three (3) member counties, which geographical areas are legally described in Chapter 7, Florida Statutes, which legal descriptions are incorporated herein by this reference.

4. Size of Population to be Served

The population of the three-county area to be served by this Agreement is 548, 676 (Citrus 147,929 / Levy 40,770 / Marion 359,977) based upon the population projections prepared by the Florida Department of Economic Opportunity, Labor Market Information Center, 2018.

5. Agreement Not Prohibited By Law

This Agreement is not prevented by State or local law from taking effect in the entire geographical area which the parties intend to serve.

6. Powers of the CLMWDC.

The parties hereto empower the Citrus Levy Marion Workforce Development Consortium (CLMWDC) to exercise the following designated decision-making powers, delegated to the Board of County Commissioners of each county pursuant to the WIOA, over all plans, programs, and agreements and to enter into agreements and contracts to provide those services currently provided or contemplated to be provided under Florida's Welfare Transition Program, the Wagner-Peyser Act, Perkins vocational training, school-to-work transition programs, Vocational rehabilitation, JOBS, WTW, Supplemental Nutritional Assistance Program (SNAP), Re-Employment Services and other workforce development programs. More specifically, the CLMWDC is hereby authorized and empowered:

- (1) to establish the WIB as the Citrus, Levy, Marion Regional

Workforce Development Board (CLMRWDB) and, where such authority is delegated by an individual Board of County Commissioners to its CLMWDC member, to appoint local members to the CLMRWDB, all in accordance with Section 107 of the WIOA and F.S. 445. CLMRWDB board members shall serve the functions described in Section 107 of the WIOA. In the absence of such delegation, the authority to appoint local CLMRWDB Board members shall reside in the individual Boards of County Commissioners for the county from which the individual CLMRWDB Board member is to be appointed. The authority to appoint at-large members to the CLMRWDB shall reside in the CLMWDC; and

(2) to enter into an agreement(s) with the CLMRWDB to determine the selection of a grant recipient and an entity to administer the job training plan, the one stop operator and to determine the procedures for development of the job training plan as described in Section 108 of WIOA; and

(3) to review and approve all workforce development plans prepared under Section 108 of the WIOA and jointly submit, along with the CLMRWDB, said plans to the Governor; and

(4) to perform any other appropriate duties necessary for the accomplishment of and consistent with the purposes of this Agreement and the WIOA; and

(5) to further empower the CLMRWDB to enter into agreements with the State of Florida Department of Economic Opportunity(DEO) or any other selected entity to administer Florida's Welfare Transition Program, Wagner-Peyser Act

Funds, Perkins vocational training, school-to-work transition programs, vocational rehabilitation, JOBS, WTW, Supplemental Nutritional Assistance Program (SNAP), Re-Employment Services and other workforce development programs; and to manage and control all those local functions traditionally managed and controlled by the DEO and,

(6) to further empower CLMRWDB to enter into agreements to provide marketing services for the above referenced functions; and,

(7) to establish rules for the conduct of business.

7. Quorum and Voting

At all meetings of the CLMWDC, the presence in person of a majority of the whole CLMWDC shall be necessary and sufficient to constitute a quorum for the transaction of business. At all meetings of the CLMWDC at which a quorum is present, all matters shall be decided by a majority vote of the members of the CLMWDC present.

8. Workforce Area Designation

Pursuant to the designation by the Governor, the three (3) counties constituting the CLMWDC shall be the WDA as provided for in Section 106 of the WIOA for the geographical area covered by this Agreement.

9. No Local Funds Required of Counties

No funds will be provided from the treasuries of any of the parties to this Agreement for implementation of the WIOA program, it being the intent hereof that all funding of the WIOA program and the other programs contemplated to be

managed pursuant to this Agreement shall be accomplished entirely by grants pursuant to the WIOA and any other available State or Federal grants. However, in accordance with Section 117(d)(3)B of the WIA, each county recognizes that appointing a WIB does not release the local elected officials or the Governor of the State of Florida for liability for misuse of grant funds obtained under the WIOA.

10. Legal Requirements

a. All parties agree to comply with all Federal, State and Local anti-discrimination laws in the administration of this Agreement.

b. All Workforce Development Plans shall be approved by the CLMRWDB and all individual members of the CLMWDC.

11. Duration of Agreement

This Agreement shall commence on the Effective date described in Paragraph 12 and shall run through the thirtieth (30th) day of June 2025. Thereafter, this Agreement may be renewed by a further writing between the parties.

12. Applicability and Effective Date

This Agreement replaces the previous Interlocal Agreement Creating the Citrus, Levy, Marion Workforce Consortium and shall be effective July 1, 2020 upon the execution hereof by the final signatory adopting this Agreement and upon filing the same with the Clerk of the Circuit Court in each County prior to July 1, 2020.

13. Dispute Resolution Process

If, during the course of this Agreement, there is a dispute between the parties, the following procedures will apply:

(1) The party which has the dispute shall notify the other parties of the nature of the dispute, in writing, with a copy to the Governor of the State of Florida;

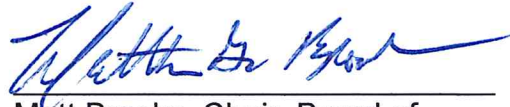
(2) All disputes and controversies of every kind and nature between the parties arising out of or in connection with this meaning, performance, nonperformance, enforcement, operation, breach, continuance, or termination shall be submitted to non-binding mediation. If the parties cannot agree upon a mutually satisfactory mediator within sixty (60) days of receiving a request for appointment of a mediator from any party to this agreement, then the Chief Judge of the Fifth Judicial Circuit shall be requested to select a mediator to mediate the dispute. The cost of the mediator shall be shared equally by the parties.

(3) If, after hearing the dispute, accord is not reached on the resolution of the dispute, the party that raised the dispute may, by giving one hundred eighty (180) days written notice, before the end of the program year (before June 30th) withdraw from the CLMWDC, effective July 1st of the following program year, or at such later time as designated by the Governor of the State of Florida.

IN WITNESS WHEREOF, the parties hereto have executed this Interlocal Agreement on the dates set forth below, and hereby agree to be bound by the terms and provisions set forth herein.

SIGNATURE PAGE

COUNTY OF LEVY

A handwritten signature in blue ink, appearing to read "Matt Brooks", written over a horizontal line.

Matt Brooks, Chair, Board of
County Commissioners

DATE: 2-4-2020

ATTEST: Clerk of the Circuit Court
And Ex Officio Clerk to the Board
Of County Commissioners

A handwritten signature in blue ink, appearing to read "Danny J. Shipp", written over a horizontal line.
Danny J. Shipp, Clerk

APPROVED AS TO FORM AND
LEGAL SUFFICIENCY

A handwritten signature in blue ink, appearing to read "Anne Bast Brown", written over a horizontal line.
Anne Bast Brown, County Attorney

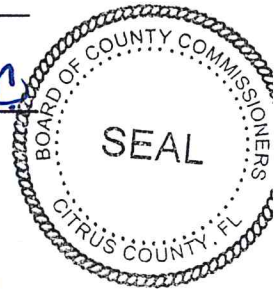
SIGNATURE PAGE

COUNTY OF CITRUS

DATE: 1-21-20

BY: _____

ATTEST: _____



SIGNATURE PAGE

COUNTY OF MARION

BY: Kathy Bryant
Kathy Bryant, Chairman,
Board of County Commissioners

DATE: February 18, 2020

ATTEST: David R. Ellspermann
David R. Ellspermann, Clerk

APPROVED AS TO FORM AND
LEGAL SUFFICIENCY

Matthew G. Minter
Matthew G. Minter, County Attorney



RECORD OF ACTION/APPROVAL

Consortium Meeting Friday, February 28, 2020

TOPIC/ISSUE:

Reappointment of Board members

BACKGROUND:

Board members are appointed on a staggered term basis to avoid a large turnover of member, thereby resulting in a loss of "corporate knowledge." Six members' terms end June 30, 2020.

Those members are:

Citrus:

- Theresa Flick- Representing persons with disabilities
- Bruce Register- Economic Development
- Rachel Riley- Current Board Chair- representing Healthcare

Levy:

- Dave Pieklik- Economic Development
- Nelson Mathis- Labor

Marion:

- Pete Beasley- Private Education

POINTS OF CONSIDERATION:

These members are active participating members

STAFF RECOMMENDATIONS:

Approve reappointment for 4 year term.

COMMITTEE ACTION:

BOARD ACTION:

BOARD MEMBERSHIP TERMS - 6/5/19

	CITRUS COUNTY	NAME	APPOINTED	LENGTH	TERM EXPIRES
1	CBO/ Barriers	Theresa Flick	6/28/2016	4	2024
2	CBO/Barriers-Vet	Ted Knight	6/28/2016	3	2023
3	Economic Development	Bruce Register	7/1/2018	1	2024
4	Education-School District	Debra Stanley	3/1/2017	4	2023
5	Private Sector	Rachel Riley	6/28/2016	4	2024
6	Private Sector	Vacant		3	2022
7	Private Sector-Business Support Services	William Burda	5/1/2017	4	2021
8	Private Sector-IT	Mike Melfi	6/28/2016	4	2023
9	Private Sector-Real Estate	Kevin Cunningham	6/28/2016	5	2021
10	Private Sector-Retail	Al Jones	5/10/2017	4	2023
	LEVY COUNTY	NAME	APPOINTED		TERM EXPIRES
1	Economic Development	David Pieklik	7/1/2018	1	2024
2	Labor	Nelson Mathis, Jr	6/28/2016	4	2024
3	Private Sector	Arno Proctor		4	2024
4	Private Sector	John Hemken		3	2024
5	Private Sector	Vacant		2	2020
6	Private Sector	Vacant		2	2021
7	Private Sector-Utilities	Kim Baxley	1/25/2018	3	2021
8	Youth Serving Organization	Carol Jones	3/1/2017	4	2023
	MARION COUNTY	NAME	APPOINTED		TERM EXPIRES
1	Adult Education	Mark Vianello	3/1/2017	3	2022
2	Apprenticeship	Fred Morgan		3	2024
3	CBO/ Barriers	Charles Harris	1/25/2018	3	2021
4	Higher Education-Private	Pete Beasley	6/28/2016	4	2020
5	Labor	Fred Morgan	6/28/2016	5	2024
6	Private Sector	Brandon Whiteman	2/25/2019	3	2022
7	Private Sector	Vacant		4	2023
8	Private Sector-Manufacturing	Pat Reddish	6/28/2016	3	2022
9	Private Sector-Manufacturing	Jeff Chang	2/25/2019	4	2023
10	Private Sector-Retail	Darlene Goddard	6/28/2016	5	2021
11	Private Sector-Utilities	Kathy Judkins	6/28/2016	5	2021
12	Trans/ Public Housing	Judy Houlios	6/28/2016	3	2022
	AREA	NAME	APPOINTED		TERM EXPIRES
1	Higher Education- Public	Mark Paugh	6/28/2016	5	2021
2	Voc Rehab	Angie White	5/1/2017	4	2024
3	Youth Serving Organization	Jorge Martinez	6/28/2016	3	2022



RECORD OF ACTION/APPROVAL

Consortium Meeting Friday, February 28, 2020

TOPIC/ISSUE:

Board Member Appointments

BACKGROUND:

Due to resignations, retirements and relocations, the following Board seats are vacant:

Private Sector: 6 vacancies: 4 Levy County; 1 Marion County; and 1 Citrus County

Apprenticeship: 1 vacancy

Vocational Rehabilitation: 1 vacancy

POINTS OF CONSIDERATION:

The following nominations are provided:

Mid-Florida Manufacturers Association:

Arno Proctor: ANCORP, Levy County

John Hemken: A&M Manufacturing, Levy County

Apprenticeship:

Fred Morgan, IBEW

Vocational Rehabilitation:

Angie White, VR

Private Sector:

Nicole Nash, Brannen Bank

Recruitment of vacancies in Marion, Citrus and Levy private sector member seats is on-going and expected to have nominations at next Consortium meeting

STAFF RECOMMENDATIONS:

Approve nominations

COMMITTEE ACTION:

BOARD ACTION:



NOMINATION FORM

FAX: 352 873-7956

EMAIL: rskinner@careersourceclm.com

Phone: 352 873-7939, Ext 1203

Name: Angie C. White

Title: Area 2 Director

Name of Business: DOE/Vocational Rehabilitation

Address: 2627 NW 43rd Street, Suite 201

City: Gainesville County: Alachua Zip Code: 32606

Business Telephone-Ext: 352/225-4847 Fax: 352/955-3223

 Private Business Owner/Chief Executive

XX Agency/Company Representing – Must be representative with optimum
Policy-making authority

Home Address: 2831 NE 10th Drive

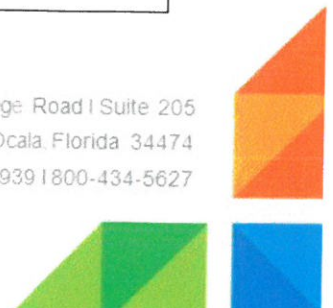
City: Gainesville County: Alachua Zip Code: 32609

Cell #: 352/213-6797

E-Mail Address: angie.white@vr.fldoe.org

INFORMATION REQUIRED BY THE STATE - Check all that Apply

Sex: Male <u> </u>	Female <u>XX</u>
Race: White <u> </u>	Black <u>XX</u> Other <u> </u>
White/Hispanic <u> </u>	Black/Hispanic <u> </u>
Veteran: Yes <u> </u>	No <u>XX</u> Disabled <u> </u>





NOMINATION FORM
FAX: 352 873-7956
EMAIL: rskinner@careersourceclm.com
Phone: 352 873-7939, Ext 1203

Name: Arno Proctor

Title: V.P. Finance

Name of
Business: ANCORP

Address: 707 SW 19th Ave

City: Williston County: Levy Code: Zip

Business Telephone-Ext: 352-528-7813 Fax 352-528-7886

☒ Private Business Owner/Chief Executive

☐ Agency/Company Representing – Must be representative with optimum
Policy-making authority

Home Address: 5393 SW 86th
PL

City: Ocala County: Marion Code: Zip

Cell #: 352-348-7460

E-Mail Address: aproctor@ancorp.com

INFORMATION REQUIRED BY THE STATE - Check all that Apply

Sex: Male ☒ Female ☐

Race: White ☒ Black ☐ Other ☐
White/Hispanic ☐ Black/Hispanic ☐



NOMINATION FORM
FAX: 352 873-7956
EMAIL: rskinner@careersourceclm.com
Phone: 352 873-7939, Ext 1203

Name: _____

Title: _____

Name of Business: _____

Address: _____

City: _____ County: _____ Zip
Code _____

Business Telephone-Ext: _____ Fax _____

_____ Private Business Owner/Chief Executive

_____ Agency/Company Representing – Must be representative with optimum
Policy-making authority

Home Address: _____

City: _____ County: _____ Zip
Code: _____

Cell #: _____

E-Mail Address: _____

INFORMATION REQUIRED BY THE STATE - Check all that Apply

Sex: Male _____ Female _____

Race: White _____ Black _____ Other _____
White/Hispanic _____ Black/Hispanic _____

Veteran: Yes _____ No _____ Disabled _____

International Brotherhood of Electrical Workers

Local Union #222

17846 North US Highway 441
Reddick, FL 32686-2726
Tel: (352) 591-3332
Fax: (352) 591-3270
Website: www.ibew222.org
E-Mail: office@ibew222.org



William (Bill) Hitt
Business Manager and
Financial Secretary



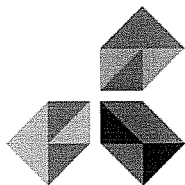
CareerSource Citrus Levy Marion
Board of Directors

Dear Sirs/Madams:

The International Brotherhood Of Electrical Workers Local 222 respectfully submits Fredrick F. Morgan Apprentice instructor and Journeyman Lineman with IBEW Local 222 for nomination as the apprenticeship representative on the CareerSource Citrus Levy Marion Board of Directors.

I believe you will find Mr. Morgan to be a capable and dedicated member of your apprenticeship board. Mr. Morgan has years of experience training apprentices and entry-level workers to the highest standards of the electrical industry throughout the state of Florida and I believe you will find him to be an asset to your board.

William (Bill) Hitt
IBEW Local 222
Business Manager/Financial Secretary
17846 N. U.S. Hwy 441, Reddick, FL 32686
Cell 352-303-8981



CareerSource
CITRUS | LEVY | MARION

NOMINATION FORM

FAX: 352 873-7956

EMAIL: rskinner@careersourcedclm.com

Phone: 352 873-7939, Ext 1204

Name: John Hemken

Title: Owner/CEO

Address: 1404 NW 15th Avenue

City: Chiefland County: Levy Zip Code: 32626

☒ Private Business Owner/Chief Executive

☐ Agency/Company Representing – Must be representative with optimum Policy-making authority

Name of Business: A&M Manufacturing, Inc.

Address: 315 NW 11th Avenue

City: Chiefland County: Levy Zip Code: 32626

Business Telephone: 920-860-1312 Fax #:

Cell #: 920-860-1312

E-Mail Address: hemkenjohn@gmail.com

INFORMATION REQUIRED BY THE STATE - Check all that Apply

Sex: Male ☒ Female ☐
Race: White ☒ Hispanic ☐ Black ☐ Other ☐
Veteran: Yes ☐ No ☒ Disabled ☐

Revised 4-26-16

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@careersourcedclm.com at least three business days in advance. CareerSource Florida Member.



careersourceclm.com

NOMINATION FORM

FAX: 352 873-7956

EMAIL: rskinner@careersourceclm.com

Phone: 352 873-7939, Ext 1203

Name: Nicole M. Nash

Title: VP Human Resource Director

Name of Business: Brannen Bank

Address: 320 US Hwy 41 S

City: Inverness County: Citrus Zip Code: 34450

Business Telephone-Ext: (352) 765-2864 Fax: (352) 726-1156

 Private Business Owner/Chief Executive

XX Agency/Company Representing – Must be representative with optimum Policy-making authority

Home Address: 5510 SW 138th Terrace

City: Ocala County: Marion Zip Code: 34481

Cell #: (352) 877-0415

E-Mail Address: nicolemaraghl@bellsouth.net and nnash@brannenbanks.com

INFORMATION REQUIRED BY THE STATE - Check all that Apply

Sex: Male Female X

Race: White Black X Other
White/Hispanic Black/Hispanic

Veteran: Yes No X Disabled

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 800 434-5627, ext. 7878 or e-mail accommodations@careersourceclm.com. Please make request at least three business days in advance.

3003 SW College Road I Suite 205
Ocala, Florida 34474
p: 352-873-7939 1 800-434-5627



RECORD OF ACTION/APPROVAL

Consortium Meeting Friday, February 28, 2020

TOPIC/ISSUE:

2020 Local Workforce Services plan approval

BACKGROUND:

Local workforce development boards are required to submit a workforce services plan every four years. Our last plan was instituted in 2016 with a subsequent addendum/modification that was submitted in 2018. The current plan submission is due no later than March 16, 2020.

POINTS OF CONSIDERATION:

The plan is currently in its 30 day comment period (ending March 13, 2020). Public notices have been published in the local media and the plan is available for review on our website as well as in hardcopy form in our administrative office. Public comment sessions were held in each county: Citrus – Monday, February 24, Levy – Tuesday, February 25, Marion – Wednesday, February 26. The draft presented for final approval contains all comments received to date. Any additional comments received will be included with the final submission of the plan.

STAFF RECOMMENDATIONS:

Approve the local plan for submission to CareerSource Florida and the Department of Economic Opportunity.

CONSORTIUM ACTION:



CareerSource

Citrus Levy Marion

Local Workforce Development Area 10

Tel 352-873-7939
Fax 352-873-7910

3003 SW College Road, Suite 205
Ocala, FL 34474

www.careersourceclm.com
dfrench@careersourceclm.com

Date Submitted: _____, 2020

Plan Contact: Dale French

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INTRODUCTION

These guidelines provide direction for local plans submitted [under Public Law 113-128, the Workforce Innovation and Opportunity Act \(WIOA\)](#). WIOA requires each local workforce development board (LWDB) to develop and deliver to the state a comprehensive four-year plan. These plans must be submitted in partnership with the chief elected official. Regulations require states and LWDBs to regularly revisit and recalibrate state plan strategies in response to changing economic conditions and workforce needs of the state ([20 CFR, Unified and Combined Plans Under Title I of the Workforce Innovation and Opportunity Act, §676.135](#)).

The law emphasizes the importance of collaboration and transparency in the development and submission of local plans. Affected entities and the public must have an opportunity to provide input in the development of the plan. Local boards must make the plan available electronically and in open meetings to ensure transparency to the public.

Local workforce development boards provide leadership and should seek broad stakeholder involvement in the development of their local plan. Local elected officials, local workforce development board members, core program partners and mandatory one-stop partners are an integral part of the planning process. WIOA encourages an enhanced, integrated system by including core programs in its planning and performance requirements. Each plan addresses how the LWDB coordinates service delivery with core programs of the Division of Vocational Rehabilitation, the Division of Blind Services and the Division of Career and Adult Education.

Each plan is based on current and projected needs of the workforce investment system, with an increased emphasis on coordination and collaboration at all levels to ensure a seamless system for employers and job seekers, including those with disabilities. Local plans identify the education and skill needs of the workforce and the employment needs of the local area. Plans include an analysis of the strengths and weaknesses of services provided to address identified needs. Assessments include the best available information, evidence of effectiveness, and performance information for specific service models and a plan to improve program effectiveness by adopting proven or promising practices as a part of the local vision. LWDBs provide a comprehensive view of the systemwide needs of the local workforce development area.

Local plans address how LWDBs foster strategic alignment, improve service integration and ensure the workforce system is industry-relevant, responding to the economic needs of the local workforce development area and matching employers with skilled workers. Services described in local plans should lead to greater efficiencies, reduce duplication, and maximize financial and human resources. These plan guidelines require LWDBs to address current and future strategies and efficiencies to address the continuous improvement of Florida's workforce system and its focus on customer service excellence.

Local plans should align with CareerSource Florida's business and market-driven principles to be the global leader for talent. These principles include:

- Increasing the prosperity of workers and employers
- Reducing welfare dependency
- Meeting employer needs
- Enhancing productivity and competitiveness

KEY DATES

ON OR BEFORE

Key Dates Sent to Local Boards.....	October 11, 2019
Local Plan Guidelines Issued	November 1, 2019
Labor Market Analysis Sent to Local Boards.....	December 6, 2019
Local Plans Due	March 16, 2020
WIOA Statewide Unified Plan Due	March 30, 2020
WIOA Statewide Unified Plan Approved	May 1, 2020
Local Plans Approved	June 4, 2020
WIOA Program Year 2020 Begins.....	July 1, 2020

PUBLIC COMMENT PROCESS

Prior to the date on which the local board submits a local plan, the local board shall:

- (1) Make copies of the proposed local plan available to the public through electronic and other means, such as public hearings and local news media (WIOA §108(d)(1)).
- (2) Provide a 30-day period for comment on the plan before its submission to CareerSource Florida, Inc., beginning on the date on which the proposed plan is made available, prior to its submission to the Governor (WIOA §108(d)(2)).
- (3) Provide a description of the process used by the board to obtain input and comment by representatives of businesses and labor organizations for the development of the plan (WIOA §108(d)(2)).
 - Public Comment Period Advertised – February 4, 5 and 6, 2020 All news outlets & CSCLM Website
 - First Draft Plan Available for Public Comment – February 13, 2020
 - Public Comment Period – February 13, 2020 – March 13, 2020
 - Citrus Presentation & Listening Session – February 24, 2020 – CareerSource Citrus Center
 - Levy Presentation & Listening Session – February 25, 2020 – CareerSource Levy Center
 - Marion Presentation & Listening Session – February 26, 2020 – College of Central Florida Enterprise Center
 - Draft Plan Presented to Full Board – March 11, 2020 – College of Central Florida
 - Draft Plan Presented to Consortium – NLT March 12, 2020 – CSCLM
 - Local Plan Due to State – March 16, 2020
 - Local Plan Approved by State – June 4, 2020

- (4)** Describe efforts to coordinate with other workforce partners to obtain input into the development of the plan.

This will be done during the public comment period Presentation & Listening sessions described in section 3 above. Local partners will be notified of the sessions and will be invited to attend the session appropriate for their county.

- (5)** Include, as an attachment with the plan to the Governor, any comments expressing disagreement or offering recommendations for continuous improvement, the LWDB's response to those comments, and a copy of the published notice (WIOA §108(d)(3)).

PLAN SUBMISSION TO CAREERSOURCE FLORIDA

ONLINE FORM

CareerSource Florida, Inc., established an online form for WIOA local plan submissions, required attachments and contact information for primary and secondary points of contact for each local workforce development board. **Please note the local plan and all attachments must be submitted in a searchable PDF format.**¹

The web address for submitting local plans, required attachments and links to requested documents is <https://careersourceflorida.com/wioa-form/>

It is recommended that those submitting local plans carefully review these instructions and those posted online prior to submitting plans.

All local plans must be submitted no later than 5:00 p.m. (EST) on Monday, March 16, 2020.

Prior to plan submission, please ensure:

- **The local board reviewed the plan;**
- **The board chair and the chief elected official signed the appropriate documents;**
- **The name and number of the local board and are on the plan cover page;**
- **The plan submitted or point of contact is on the cover page;**
- **The structure and numbering follows the plan instructions format;**
- **A table of contents with page numbers is included and each page of the plan is numbered;**
- **Text is typed, preferably in the fonts Arial or Calibri, with a font size of 11 or greater;**
- **Responses to all questions are informative and concise; and,**

¹ A searchable PDF file is a PDF file that includes text that can be searched upon using the standard Adobe Reader “search” functionality [CTRL+F]. In Microsoft Word Click **File > Save As** and choose where you want the file to be saved. In the **Save As** dialog box, choose **PDF** in the Save as type list. Click **Options**, make sure the **Document structure tags for accessibility** check box is selected, and then click **OK**.

- The name of the local area, the page number and plan submission date are listed in the footer of the document.

ATTACHMENTS

Please provide a link to the local board's website showing the attachments described below or upload attachments in a searchable PDF file with the local plan:

- A. Executed Memoranda of Understanding for all one-stop partners (Section III(b)(2) and Section IV(a)(1)(d) of the State of Florida WIOA Unified Plan);
- B. Executed Infrastructure Funding Agreements with all applicable WIOA required partners (Section III(b)(2) and Section IV(a)(1)(d) of the State of Florida WIOA Unified Plan);
- C. Executed Interlocal Agreements (in cases where there is more than one unit of general local government);
- D. Agreements describing how any single entity selected to operate in more than one of the following roles: local fiscal agent, local board staff, one-stop operator or direct provider of career services or training services entity will carry out its multiple responsibilities, including how it develops appropriate firewalls to guard against conflicts of interest. Also attach copies of any procedures on how roles are delineated to verify the firewalls are effective.
- E. The current board member roster, meeting minutes for the local plan agenda item, discussions about the plan, and the board's vote on the local plan;
- F. Any comments submitted during the public comment period that represent disagreement with the local plan (Public Law 113-128, Section 108(d).
- G. If the local area includes more than one unit of general local government in accordance with WIOA sec. 107(c)(1)(B), attach the executed agreement that defines how parties carry out roles and responsibilities of the chief elected official;
- H. A copy of the agreement executed between the chief elected official(s) and the Local Workforce Development Board;
- I. A copy of the current by-laws established by the chief elected official to address criteria contained in §679.310(g) of the WIOA regulations;

NOTE: THERE IS NO REQUIREMENT TO SUBMIT HARD COPIES OF LOCAL PLANS OR ATTACHMENTS.

If you have any questions, please contact CareerSource Florida at:
FloridaWIOA@careersourceflorida.com

Once plans are received, the plan's official review by CareerSource Florida and the Department of Economic Opportunity (DEO) begins. All plans are reviewed for completeness and adherence to plan formatting requirements.

If there are questions or concerns local boards are notified. **The content of plans is reviewed by both DEO and CareerSource Florida staff with recommendations provided to the CareerSource Florida Board of Directors at its meeting scheduled for June 4, 2020.**

A recommendation for approval is made unless the staff review indicates: (1) there are deficiencies in local workforce investment activities that are not addressed, or (2) the plan is inconsistent with WIOA and its regulations, including required public comment provisions. It is recognized that this updated plan will include strategies and activities that are fully completed, as well as some that are still being developed and implemented.

FLORIDA'S VISION FOR IMPLEMENTING THE WORKFORCE INNOVATION AND OPPORTUNITY ACT

The implementation of WIOA ensures Florida has a business-led, market-responsive, results-oriented, and integrated workforce development system. The system fosters customer service excellence, ensures continuous improvement, and demonstrates value by enhancing employment opportunities for all individuals, including those with disabilities. This focused and deliberate collaboration among education, workforce, and economic development networks increases economic prosperity by maximizing the competitiveness of Florida businesses and the productivity of Florida's workforce.

Florida's strategic vision for WIOA implementation is realized by accomplishing these three goals:

- Enhance alignment and market responsiveness of workforce, education and economic development systems through improved service integration that provides businesses with skilled, productive, and competitive talent and Floridians with employment, education, training and support services that reduce welfare dependence and increase opportunities for self-sufficiency, high-skill and high-wage careers and lifelong learning.
- Promote accountable, transparent and data-driven workforce investment through performance measures, monitoring and evaluation that informs strategies, drives operational excellence, leads to the identification and replication of best practices and empowers an effective and efficient workforce delivery system.
- Improve career exploration, educational attainment and skills training for in-demand industries and occupations for Florida youth that lead to enhanced employment, career development, credentialing and post-secondary education opportunities.

ORGANIZATIONAL STRUCTURE

(1) Chief Elected Official(s)

- A. Identify the chief elected official(s) by name, title, mailing address, phone number and email address.

Commissioner Jimmie T. Smith
110 N. Apopka Avenue, Inverness, FL 34450
Phone: 352-3114-6560
Fax: 352-341-6584
Toll Free: 352-489-2120 (Citrus Springs & Dunnellon)
Jimmie.Smith@CitrusBOCC.com

Commissioner Rock Meeks
355 S. Court Street
Bronson, FL 32621
352-486-5218
District2@levycounty.org

Commissioner Jeff Gold
601 SE 25th Avenue
Ocala, FL 34471
352-438-2300
Jeff.gold@marioncountyfl.org

- B. If the local area includes more than one unit of general local government in accordance with WIOA sec. 107(c)(1)(B), attach the executed agreement that defines how parties carry out roles and responsibilities of the chief elected official.

(Attachment 1: Interlocal Agreement)

- C. Attach a copy of the agreement executed between the chief elected official(s) and the Local Workforce Development Board.

(Attachment 2: 2015 Memorandum of Agreement)

- D. Attach a copy of the current by-laws established by the chief elected official to address criteria contained in §679.310(g) of the WIOA regulations. At a minimum the by-laws must include:

- i. The nomination process used by the chief elected official to elect the local board chair and local board members;
- ii. The term limitations and how term appointments are staggered to ensure only a portion of memberships expire in each year;
- iii. The process to notify the chief elected official of a board member vacancy ensuring a prompt nominee;
- iv. The proxy and alternative designee process used when a board member is unable to attend a meeting and assigns a designee per requirements at §679.110(d)(4) of the proposed WIOA regulations;
- v. The use of technology, such as phone and web-based meetings used to promote board member participation;

- vi. The process to ensure board members actively participate in convening the workforce development system's stakeholders, brokering relationships with a diverse range of employers, and leveraging support for workforce development activities; and,
- vii. Any other conditions governing appointments or membership on the local board.

(Attachment 3: Memorandum to Establish CLMRWDB)

- E. Describe how the chief elected official is involved in the development, review and approval of the local plan.

The Consortium has been informed of the meetings being held with community partners regarding the WIOA Plan. Citrus Presentation & Listening Session February 24, 2020 @ College of Central Florida, Levy Presentation & Listening Session February 25, 2020 @ College of Central Florida, Marion Presentation & Listening Session February 26, 2020 @ College of Central Florida. The Consortium has been provided draft of the Plan for review and has been presented to the Consortium, along with any public comments and the decision of the Board regarding those comments. The Consortium is invited to discuss the plan with staff and provide input. The first meeting was to outline the structural requirements for the board, the recommendations for membership structure and size and the recruitment of new members and proxies. The Board provides the Consortium with on-going information on the development of the plan, to include copies of Board agenda that discuss various aspects.

(2) Local Workforce Development Board (LWDB)

- A. Identify the chairperson of the Local Workforce Development Board by name, title, mailing address, phone number and email address. Identify the business that the chair represents.

Rachel M Riley
 Citrus Memorial Hospital
 502 W Highland Blvd.
 Inverness, FL 34452
 Phone: 352-344-6504
Rachel.Riley@HCAHealthcare.com

- B. If applicable, identify the vice-chair of the Local Workforce Development Board by name, title, mailing address, phone number and email address. Identify the business or organization the vice-chair represents.

Kimberly A. Baxley, MBA
Vice President for Human Resources
Central Florida Electric Cooperative, Inc.
11491 NW 50th Avenue, Chiefland, FL 32626
PO Box 9, Chiefland, FL 32644
Phone: 352-493-2511 ext. 6981
Cell: 352-221-3394
KBaxley@cfec.com

- C. Describe how the LWDB was involved in the development, review, and approval of the local plan.

In 2015, the board engaged Thomas P. Miller and Associates to assist it in developing its WIOA Strategic Plan. This Plan was adopted by the Board and Consortium in June 2015 and programming realignment was initiated for full implementation of WIOA by July 1, 2016. As part of the Strategic Plan, local workforce boards whose labor markets, commuter patterns and industry sectors aligned with CareerSource CLM were also identified.

As a direct provider of services in this workforce area the workforce board is active in the day to day management of services within the career centers and is therefore in tune with local economic conditions. It is the direct work of the frontline staff of the workforce development board that shapes the processes and service delivery methods as endorsed by the board of directors. It is also the input of frontline staff to the board that helps in the decision making processes.

Workforce board staff members are responsible for the writing and coordination with the chief elected officials, the board of directors, and the public through advertised information sessions to compile all strategies and input to create the comprehensive plan.

(3) Local Grant Subrecipient (local fiscal agent or administrative entity)

- A. Identify the entity selected to receive and disburse grant funds (local fiscal agent) if other than the chief elected official. WIOA section 107(d)(12)(B)(1)(iii); 20 CFR 679.420

The Consortium has selected the Citrus Levy Marion Regional Workforce Development Board, Inc., dba CareerSource Citrus Levy Marion.

- B. Identify the entity selected to staff the LWDB (commonly referred to as the administrative entity) and assist it in carrying out its responsibilities as a board organized under WIOA. (May be the same as the fiscal agent). 20 CFR 679.430

The Citrus Levy Marion Regional Workforce Development Board has elected to hire its own staff to serve as administrative entity, staff the One Stop centers and act as direct service provider within the local area.

- C. Identify if a single entity is selected to operate in more than one of the following roles: local fiscal agent, local board staff, one-stop operator or direct provider of career services or training services, and describe how the entity will carry out its multiple responsibilities, including how it develops appropriate firewalls to guard against conflicts of interest as described in CareerSource Florida strategic policy [2012.05.24.A.2 – State and Local Workforce Development Board Contracting Conflict of Interest Policy](#).

CSCLM has been selected by the Consortium to serve as fiscal agent, administrative entity, and direct provider of services. The Board does not provide youth services or training services. Additionally, a One Stop Operator has been procured to carry out the mandatory duties of an operator as described in the WIOA.

The Consortium provides the overarching checks and balances for services and activities performed by CSCLM. They are provided in the following documents and information and key information is reviewed and approved at their meetings:

- Performance reports- state and federal reports
- Budgets
- Service reports- reports on services to their counties and residents, monthly, quarterly and annually. These are provided to all commissioners, not just consortium members.
- Audits and state monitoring reports, programmatic and fiscal
- In the selection of the Direct Service Provider, the Consortium approves the procurement approach and serves in an appeal capacity when it reviews and approves the Board's recommendation/request to serve as Direct Service Provider.
- At the Board level, its committees (performance, executive/audit, career centers, performance and monitoring, marketing and outreach) receive reports on performance and services that are provided to the Consortium. In addition, the Executive Committee reviews and recommends the initial and subsequent budget adjustments to the Board.
- At the Staff level, monitoring is a function within the Administrative Service staff and contracted third party monitors which report to the

Performance and Monitoring and Career Center Committees and reported. These reports are shared with the Board and Consortium.

- The One Stop Operator (OSO) works with staff in carrying out their functions and reports to the Career Center committee and provides annual reports to the full board.
- Separation of duties between Finance, Operations, and Administration ensure a solid process of checks and balances within the system.

This structure provides a separation that allows the Board to oversee the direct provision of Career Services, fiscal and administrative services. The Board selects its auditors and independent monitors through a written and oral presentation process that ensures its integrity and separation from staff influence.

(4) One-Stop System

- A. Describe the local one-stop system (including the number, type and location of the comprehensive center(s)², and other service delivery points).

CSCLM operates both fixed and mobile unit services throughout Citrus, Levy and Marion Counties. Its fixed office locations are in Lecanto (Citrus), Chiefland (Levy) and Ocala (Marion). Services in Marion County are provided through our comprehensive center as well as our Talent Center which is a partnership office between CSCLM and the College of Central Florida. The Talent Center acts as full service One Stop and the placement office for the college. Our mobile services include 4 person and 10 person mobile units. These are scheduled to provide services in areas which are not convenient to its fixed locations, provide on-site services at events such as on-site employer hiring, community events, partner events, REACT services, and can be deployed to neighboring workforce boards when additional assistance is required. Most recently our mobile units were dispatched to Panama City after Hurricane Michael's widespread devastation in the Florida Panhandle in the fall of 2018.

²A comprehensive center is one in which all core and required partner services are available either physically at the location or by direct linkage through technology to a program staff member who can provide meaningful information or services. See Training and Employment Guidance Letter No. 16-16 ([TEGL 16-16](#)) and Training and Employment Guidance Letter No. 16-16, Change 1 ([TEGL 16-16, Change 1](#)). **Additionally, Memorandums of Understanding (MOU) and Infrastructure Funding Agreements (IFA) must be executed for all partners connected to the comprehensive centers.**

The Ocala Career Center serves as the area's Comprehensive Career Center and is located at:

2703 NE 14th Street
Ocala, FL 34470

CSCLM's services are accessible 24/7 through its website that also provides live chat during normal business hours.

- B. Identify the days and times when service delivery offices are open to customers. Customers must have access to programs, services and activities during regular business days at a comprehensive one-stop center.

Individual and Career Services are provided Monday through Friday, 8:00 a.m. to 5:00 p.m. in all of our locations. Except Mobile Units, which hours and days are posted online.

- C. Identify the entity or entities selected to operate the local one-stop center(s).

Thomas P. Miller & Associates has been procured to perform One Stop Operator functions.

- D. Identify the entity or entities selected to provide career services within the local one-stop system.

Citrus Levy Marion Regional Workforce Development Board d/b/a CareerSource Citrus Levy Marion (CSCLM) provides direct services.

- E. Identify and describe what career services are provided by the selected one-stop operator and what career services, if any, are contracted out to service providers.

All career services are provided by the local board staff through a waiver with from the governor with Youth career services being provided through a procured provider – currently Eckerd Connects. Training services are provided through partnerships with local educational entities.

- F. Pursuant to the [CareerSource Florida Administrative Policy 093 - One-Stop Career Center Certification Requirements](#), provide the required attestation that at least one comprehensive one-stop center in the local area meet the certification requirements.

(Attachment 4: Signed Attestation)

ANALYSIS OF NEED AND AVAILABLE RESOURCES

(1) Please provide an analysis (or existing analysis pursuant to WIOA section 108(c)) of the regional economic conditions, which must include:

- A. Information on existing and emerging in-demand industry sectors and occupations;
and

As part of WIOA Strategic Planning, our local board and partners have identified Manufacturing, Transportation/Distribution, Information Technology, Healthcare, and Hospitality (formally Accommodation and Food Services) as the demand sectors to focus on in our area. Construction was added to our targeted sector list in December of 2017, and Accommodation and Food Services (Hospitality) was added in December of 2019. Emerging sectors include Educational Services, with an estimated demand of 5,722 and an annual growth rate of 0.5% over the next 5 years, and Administrative/Support/Waste Management/Remediation Services, with an estimated demand of 5,438 and an annual growth rate of 0.7% over the next 5 years.

In Demand and Emerging Industries

Workforce Development Area 10 – Citrus, Levy and Marion Counties							
		Current	5-Year Forecast				
NAICS	Industry	Empl	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
44	Retail Trade	24,652	16,369	7,257	9,170	-58	0.0%
62	Health Care and Social Assistance	26,951	15,108	6,447	6,664	1,997	1.4%
72	Accommodation and Food Services	15,808	13,900	5,788	7,290	823	1.0%
23	Construction	14,059	7,738	2,526	4,519	693	1.0%
61	Educational Services	11,554	5,722	2,599	2,805	318	0.5%
56	Administrative and Support and Waste Management and Remediation Services	8,744	5,438	2,166	2,955	317	0.7%
31	Manufacturing	10,361	5,293	1,981	3,392	-80	-0.2%
81	Other Services (except Public Administration)	7,660	4,501	2,001	2,389	111	0.3%
92	Public Administration	9,129	4,304	1,780	2,422	102	0.2%
48	Transportation and Warehousing	5,276	2,905	1,201	1,625	79	0.3%
71	Arts, Entertainment, and Recreation	3,798	2,845	1,213	1,498	135	0.7%
54	Professional, Scientific, and Technical Services	5,831	2,819	944	1,598	276	0.9%
11	Agriculture, Forestry,	4,684	2,590	1,084	1,462	45	0.2%

	Fishing and Hunting						
42	Wholesale Trade	4,579	2,394	903	1,497	-7	0.0%
52	Finance and Insurance	3,488	1,720	621	1,020	79	0.4%
53	Real Estate and Rental and Leasing	2,744	1,482	639	765	78	0.6%
51	Information	1,461	636	249	442	-55	-0.8%
22	Utilities	1,399	605	226	399	-21	-0.3%
21	Mining, Quarrying, and Oil and Gas Extraction	225	121	38	78	5	0.5%
55	Management of Companies and Enterprises	238	116	40	69	7	0.6%
99	Unclassified	94	57	23	31	3	0.6%
	Total - All Industries	162,734	94,724	38,388	51,429	4,906	0.6%

Source: JobsEQ, Data as of 2019Q1

B. The employment needs of employers in those industry sectors and occupations (WIOA §108(b)(1)(A)).

Our strong partnership with our area educational providers, the Mid-Florida Regional Manufacturers Association (MRMA), the Ocala Human Resource Management Association (ORHMA), Ocala/Marion County Chamber and Economic Development Partnersip, Citrus County Chamber of Commerce and the Nature Coast Business Development Council has helped keep us in tune with the needs of local businesses across targeted sectors. As manufacturing and distribution centers continue to move to our area, the workforce required to maintain the demand of today's manufacturing facilities must be multi-faceted in regard to core competencies and be adaptable to new processes and technology. We find our greatest need in this sector to be in the "middle-skilled" positions such as team assemblers, material handlers and inspectors. In the Healthcare sector we see a shortage in LPNs, RNs and Doctors. In Transportation/Distribution, our area has a need for CDL Truck Drivers, like many areas in the State and across the country. With a supply gap of 30%, this is our greatest supply shortage. In Hospitality there is a shortage across the board ranging from housekeepers to event planners.

(2) Please provide an analysis of the knowledge and skills needed to meet the employment needs of the employers in the local area, including employment needs in in-demand industry sectors and occupations (WIOA §108(b)(1)(B)).

According to the occupation profiles for those positions in highest demand in the Manufacturing sector knowledge and skills needed include:

KNO WLED GE	Attribute	Importance
	Production and Processing	72

	English Language	38
	Customer and Personal Service	31
	Mechanical	31
	Mathematics	29
SKILLS	Monitoring	50
	Critical Thinking	50
	Active Listening	50
	Speaking	50
	Reading and Comprehension	47

In the Healthcare sector, needed knowledge and skills include:

KNOWLEDGE	Attribute	Importance
	Medicine and Dentistry	88
	Psychology	83
	English Language	80
	Customer and Personal Service	79
	Education and Training	78
SKILLS	Active Listening	77
	Speaking	76
	Reading Comprehension	74
	Critical Thinking	74
	Monitoring	72

For the Transportation and Distribution sector, needed knowledge and skills include:

KNOWLEDGE	Attribute	Importance
	Transportation	75
	Public Safety and Security	68
	Customer and Personal Service	67
	English Language	62
	Mechanical	55
SKILLS	Reading Comprehension	50
	Speaking	50
	Critical Thinking	50
	Monitoring	50
	Active Listening	47

Source: JobsEQ Analytics

- (3) Please provide an analysis of the workforce in the local area, including current labor force employment (and unemployment) data, information on labor market trends, and the

educational and skill levels of the workforce in the local area, including individuals with barriers to employment (WIOA §108(b)(1)(C)).

The labor force for LWDB 10 was 203,683 for the month of November 2019, the most recent data available. This is down slightly from the prior month's 205,416, but up over the prior year, as the labor force for November 2018 was 201,097. The unemployment rate has trended down in the past year to 3.5%, decreasing by about 14% from the November 2018 rate of 4.1%.

	NOVEMBER 2019			
WORKFORCE	LABOR FORCE	EMPLOYMENT	UNEMPLOYMENT	
REGION			LEVEL	RATE
Workforce Region 10	203,683	196,634	7,049	3.5%

Source: Local Area Unemployment Statistics (LAUS)

The educational level of the workforce in the local area is predominately high school graduates for the population 25 years and older at 36.9% for Marion County, 37.8% for Citrus County and 41.4% for Levy County.

Subject	Marion County, FL			
	Total		Percent	
	Estimate	Margin of Error	Estimate	Margin of Error
Population 25 years and over	255,204	+/-154	(X)	(X)
Less than 9th grade	9,296	+/-1,027	3.60%	+/-0.4
9th to 12th grade, no diploma	24,472	+/-1,447	9.60%	+/-0.6
High school graduate (includes equivalency)	94,296	+/-2,638	36.90%	+/-1.0
Some college, no degree	55,299	+/-1,793	21.70%	+/-0.7
Associate's degree	22,429	+/-1,144	8.80%	+/-0.4
Bachelor's degree	32,915	+/-1,475	12.90%	+/-0.6
Graduate or professional degree	16,497	+/-1,054	6.50%	+/-0.4

Subject	Citrus County, FL			
	Total		Percent	
	Estimate	Margin of Error	Estimate	Margin of Error
Population 25 years and over	112,033	+/-205	(X)	(X)
Less than 9th grade	3,650	+/-559	3.30%	+/-0.5
9th to 12th grade, no diploma	10,496	+/-848	9.40%	+/-0.8
High school graduate (includes equivalency)	42,369	+/-1,285	37.80%	+/-1.2
Some college, no degree	25,666	+/-1,230	22.90%	+/-1.1
Associate's degree	9,858	+/-848	8.80%	+/-0.8
Bachelor's degree	12,905	+/-944	11.50%	+/-0.8

Graduate or professional degree	7,089	+/-628	6.30%	+/-0.6
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Subject	Levy County, FL			
	Total		Percent	
	Estimate	Margin of Error	Estimate	Margin of Error
Population 25 years and over	28,851	+/-118	(X)	(X)
Less than 9th grade	1,128	+/-260	3.90%	+/-0.9
9th to 12th grade, no diploma	3,628	+/-435	12.60%	+/-1.5
High school graduate (includes equivalency)	11,934	+/-597	41.40%	+/-2.1
Some college, no degree	6,199	+/-501	21.50%	+/-1.7
Associate's degree	2,517	+/-391	8.70%	+/-1.3
Bachelor's degree	2,183	+/-295	7.60%	+/-1.0
Graduate or professional degree	1,262	+/-258	4.40%	+/-0.9

- (4) Please provide an analysis of the workforce development activities (including education and training) in the local area, including an analysis of the strengths and weaknesses of such services and the capacity to provide such services, to address the identified education and skill needs of the workforce and employment needs of employers in the local area (WIOA §108(b)(1)(D) and WIOA §108(b)(7)).

LWDB 10 has well established relationships with our local training providers to provide flexible training services to meet the needs of local businesses. In addition to traditional classroom programs already offered by area training providers, CSCLM is dedicated to meeting the needs of our labor market through several work-based initiatives to 'grow our own' in the demand sectors our board has identified. Work-based training can be provided as a stand-alone service or may be coupled with traditional training approaches to create customized educational tracks. Through close partnerships with area educators, custom designed classroom training can be created for local candidates as well as employees of existing businesses within the region as need arises. These partnerships and the customized trainings developed as a result are a strength of our local area. Two examples of this are the creation of the Commercial Drivers License class A training program that came into operation in January of 2019 at Marion Technical College in Ocala. This program was launched with direct input by industry leaders and tuition funding provided by CSCLM. Additionally, our partnerships with the local technical colleges culminated the current offering of Construction Core classes to begin pipeline development of talent in the construction industry to respond to recent spikes in demand. The Construction Core program provides entry level competencies for individuals entering the construction industry and can be combined with additional training through the recently developed construction apprenticeship at Marion Technical college. We are also in the process of expanding our online course offerings through Metrix Learning (NY Wired for Education) and 180 Skills to better meet the short term training needs of our job candidates and businesses. We are also working with the College of Central Florida and Metrix Learning to develop educational on-ramps and off-ramps to

promote continued educational opportunities through the college. The introduction of additional online training opportunities will act as a feeder into credit and degreed courses through the college. Metrix Learning can also act as a 'value-add' by supplementing existing college curriculum with the training programs of local businesses to create truly business driven training programs.

Training and Education services available to individuals include On-the-Job Training (OJT), Customized Training, Customized Training for Employed Workers, Incumbent Worker Training, Pre-Vocational Training, Basic Skills Training, Occupational Skills Training, and Paid Internships and Work Experience Training.

Our OJT program allows us to partner directly with a business when they are hiring a new employee to assess and identify skills gaps that exist between the candidate's existing skills and those required by the business. This approach allows us to directly address the businesses individual needs. Once the skills gap is identified, a training plan and agreement can be drafted to stipulate the amount of time in which the business can receive financial assistance through the form of wage reimbursements from workforce while they train the new employee on the skills that are required for the position. OJT continues to prove to be a powerful tool to assist businesses that are in need of specific skills that may not be commonly held in today's diverse workforce. OJT is often offered in conjunction with traditional training to provide hands-on training and experience.

Paid Work Experience/Internship continues to be a valuable avenue for students and those with little practical work experience to gain the skills needed to build and refine their resume. It provides up to 12 weeks of paid (by CSCLM) work site training in a specific occupation or industry and proven to be a powerful vehicle for moving individuals into employment.

Though apprenticeships are currently limited in our area, our board recognizes that they can be a strong tool in connecting the workforce with the needs of our businesses. To that end, we are working in tandem with Marion Technical College, Withlacoochee Technical College and the College of Central Florida in the development of additional apprenticeship programs. Marion Technical College has recently launched a masonry program and is in process of starting their construction apprenticeship. The College of Central Florida is expected to launch an apprenticeship in Hospitality in the spring of 2020. Marketing efforts and discussions with local businesses and our partnered educational providers are underway to pave the way in creating the 'second college'. We are also in the process of defining and creating pre-apprenticeship training that will provide the needed preparatory work to ensure a successful and well invested program.

The recent award of our third YouthBuild USA grant allows us to offer pre-apprenticeship training to young adults through our Youth program. The pre-apprenticeship training will include the Home Builders Institute Pre-Apprenticeship Certificate Training (HBI-PACT) with additional skills learned in warehousing, forklift and OSHA training.

In all experiential learning activities, partnering businesses agree to teach the skills necessary to succeed on the job and will provide the same working conditions for the referred individual as other employees. Training outlines that list the skills to be taught according to the agreement are closely monitored. Work sites and trainees are tracked regularly to ensure attendance and progress toward the goal. Staff work directly with the participating businesses to ensure that training is occurring as agreed upon and works as a mediator between the business and trainee when additional employment counseling is required.

All training investments are strategically focused on Targeted Sectors and related occupations.

- (5) Please provide a description and assessment of the type and availability of adult and dislocated worker employment and training activities in the local area (WIOA §108(b)(7)). WIOA training services are reserved for customers who do not have access to or adequate amounts of other sources of subsidized training such as TANF, VRAP, PELL, etc. The following employment and training services will be available to Adult and DW participants:

- Occupational Skills/Classroom Training
- On the Job Training
- Customized Training
- Customized Training for Employed Workers
- Apprenticeships
- Pre-Apprenticeships
- Incumbent Worker Training
- Skill Upgrading and Re-Training
- Entrepreneurial Training
- Transitional jobs
- Supportive Services
- Case Management
- Follow-Up Services
- Concurrent Education in Job Readiness
- Adult Education
- Literacy Skills
- English Language Acquisition

In keeping with WIOA legislation, our board has determined that our Adult (AD) and Dislocated Worker (DW) program requirements will focus on Work-Based Training Models and Career Pathways. Meaningful Work-Based Models will be relied on to help the candidate maintain relevancy in the job market. Our locally branded Custom

Business Training includes OJT, Incumbent Worker Training, and Customized Training, that can be used to help individuals maintain marketability through skills attainment and upgrades. Programs like these have the added benefit of helping local businesses to maintain their competitive edge through a skilled labor force. The training program should be directly linked to occupations that support the local workforce and economy as outlined in the demand data in Section A.

It is the goal of CSCLM to provide quality assessments and referrals to educational partners to assist candidates in establishing attainable goals. Under WIOA, all Adult and Dislocated Worker enrollments will begin with an Initial Assessment which uses a standardized format that helps staff determine the candidate's individual needs and the level of service required to best assist them in achieving their goals. This Initial Assessment is used to draft the candidate's Individual Employment Plan and to set short and long term employment and educational goals. Candidates' needs will be assessed through an analysis of past experience matched with demand occupations in the area to identify skills gaps. Candidates seeking specialized or technical training may also be assessed with a formal competency and aptitude assessment such as the Wonderlic SLE. This additional assessment will help staff determine an individual's ability to be successful in their chosen career path. Once assessed, a candidate may be determined to have the knowledge, skills and abilities (KSAs) to obtain or retain employment with minimum career services. If they are determined to lack critical KSAs to obtain or retain employment in a demand occupation they may benefit from short-term training, either classroom or work-based. Finally, if they lack most critical KSAs to obtain or retain employment, they will require enhanced career services and training.

On the Job Training (OJT) is designed to assist businesses with the training and employment needs of their workforce meeting specific guidelines so that the business and trainee can maintain a competitive edge in the marketplace. The three unique features of the OJT program are:

- 1) The individual begins training as a new employee or an incumbent worker begins training for a new position
- 2) The individual receives training at the workplace, under appropriate supervision, thus acquiring occupational skills and knowledge in an "on-the-job" training environment
- 3) The trainee is able to earn a wage while in training while the business is acquiring an employee with a well-rounded and specific skill set to match their businesses needs

Under WIOA, local boards may set their reimbursement rate to participating businesses up to 75% of the OJT trainees hourly or salary rate of pay as listed in the WIOA section 134(c)(3)(H). Our local board has determined that participating businesses will receive a 50% reimbursement rate for eligible OJT participants. A 75% reimbursement rate will be established when a business enters into an agreement where the OJT trainee is designated as a focus demographic such as veterans, recipients of cash assistance, individuals with a disability, homeless persons, and criminal offenders.

Classroom Training may be a standalone training component or it can be combined with an OJT or customized training when formal classroom education is needed for the trainee to attain specific skills, credentials or certifications that cannot be attained through work-based training only.

Internships and Work Experience opportunities are planned, structured training and learning experiences that take place in a workplace for a limited period of time and expose the trainee to a specific career path or practical workplace experience. It is our policy that this type of training can be offered to candidates that have received Occupational Skills Training, need additional training and/or practicum in a field of study, or to provide updated skills in order to gain employment. The goals of the Internship and Work Experience programs are to:

- 1) Provide a means to increase the trainee's occupational skills;
- 2) Provide unemployed individuals the opportunity to earn a training stipend while gaining updated skills in a practical environment; and
- 3) Increase the chances of placement in unsubsidized jobs.

Unlike OJT, there is not the expectation that a training agreement will result in a direct hire at the completion of the training. But, it *is* our desire that the business will value the intern/work experience trainee and will consider hiring them into regular, ongoing employment should an opportunity exist or later become available.

Customized Training is made available to local businesses with a need to train their existing workforce. This training may be needed to maintain competitiveness in the current economy, to introduce new skills and technologies to workers and mitigate risk of layoff. Customized Training is a business service and provided as a flexible tool to meet the business' needs. Businesses may be reimbursed up to fifty percent of the overall training costs at the successful completion of the training.

- (6) Please provide a description and assessment of the type and availability of youth workforce investment activities in the local area, including activities for youth who are individuals with

disabilities. The description and assessment must include an identification of successful models of such youth workforce investment activities (WIOA §108(b)(9)).

Many workforce investment opportunities exist for youth in the CSCLM area, including but not limited to: paid work experience, traditional occupational skills training, on the job training, internships, mentoring and soft skills workshops.

Youth services are offered to a wide array of youth facing diverse challenges such as previous incarceration, homelessness, substance abuse, and physical impairments. Our community partners include:

- Kids Central – Foster Care
- Bays Area Youth Services – Diversion Program
- Episcopal Children's Services
- The Arnette House – Foster Care/Alternative Education
- Department of Juvenile Justice
- Cypress Creek Juvenile Correctional Center
- College of Central Florida
- Marion Technical College
- Withlacoochee Technical College
- Marion Technical Institute
- S.R.M.I. Silver River Mentoring & Instruction
- P.A.C.E. center for girls
- Vocational Rehabilitation

Eckerd Connects is currently the local provider of youth workforce investment services in LWDA10. Eckerd is focused on serving youth ages 14-24 with barriers to employment such as basic skills deficiency, offender records and disabilities. The program develops community-wide partnerships and collaborations among state agencies, local municipalities, local workforce development areas, community based organizations, School Districts and Adult Education programs.

Our Phoenix Rising program, currently operated with local formula youth and YouthBuild funding, has proven to be a successful youth model in our community. The 20 week training program provides basic education and construction training to youth with barriers to employment; specifically those without a GED or high school diploma. Youth graduate with a high school diploma, OSHA and HBI credentials, and many also receive Customer Service and Safe Serve Food Handler certifications, as well as Warehouse & Forklift Certification. They are also required to engage in leadership and community service activities. Youth with criminal records who complete this program are shown to have lower recidivism rates. This program

currently has an over 90% placement rate in employment or education. We are currently offering the Phoenix Rising program in Citrus and Marion counties.

CSCLM is also working with industry partners within our Targeted Sectors to increase information regarding careers and training opportunities for our youth. These educational and outreach activities are geared to opening up the minds of parents, educators and youth in regards to good available careers within these targeted sectors.

CSCLM in partnership with its many community and educational partners hosts a Youth Career Expo in the spring of each year in each of our service counties to allow youth in the local high schools to see what occupations and training opportunities are available in our local economy. The Youth Career Expo hosted in Citrus, Levy and Marion Counties will be attended by nearly 1200 middle and high school students with participation from over 90 businesses and 120 community volunteers.

WORKFORCE DEVELOPMENT AREA VISION AND STRATEGIC GOALS

- (1) Describe the local board's strategic vision and goals for preparing an educated and skilled workforce (including youth and individuals with barriers to employment), including goals relating to primary indicators of performance described in WIOA section 116(b)(2)(A) to support regional economic growth and economic self-sufficiency (WIOA §108(b)(1)(E)).

Mission

CareerSource Citrus Levy Marion (CSCLM) brings together citizens, employers and educational providers to develop programs to support high-quality education/training and employment services to meet regional workforce needs.

Vision

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.

Goals and Strategies

In July 2014, Congress passed the Workforce Innovation and Opportunity Act (WIOA) to replace the Workforce Investment Act of 1998. Taking effect on July 1, 2015, WIOA provided an opportunity for CSCLM board to review our practices in light of the evolving workforce and economic dynamics within our community. It provided an opportunity to further transform the way the workforce system is doing business and realize a new vision for talent development built around the notion of a

demand-driven system that leverages resources and partnerships to provide an inclusive talent pool.

In February 2015, CSCLM engaged Thomas P. Miller and Associates to facilitate the creation of a strategic plan and assist with the preparation for the implementation of the WIOA. The Board's goal was to refine its current policies and strategies in light of the vision of WIOA and the opportunities that the law presents.

WIOA establishes an integrated, job-driven public workforce system that links diverse talent to businesses and adopts a broad perspective for talent development by linking with economic development, educational institutions, and other community-based organizations for comprehensive planning, collaboration, and service delivery.

Conversations with the Board, its staff, and community partners revealed several overarching themes for focus areas of the board's strategic plan. Themes revolve around leveraging current strengths and expanding services to increase collaboration and reach more business and job seeker customers.

Goal 1: Adopt a sector strategy approach that drives career pathways and addresses individual business services

Strategy 1.1	Strengthen and/or launch sector partnerships in the region
Strategy 1.2	Provide proactive solutions-based business services to individual companies
Strategy 1.3	Serve as the source of demand information for career pathways in the area
Strategy 1.4	Strengthen the feedback loop between business services and the CareerSource centers

Adopting and implementing a sector strategy approach is one of the top priorities of CSCLM which will create a mechanism to ensure career pathways and services to job seekers will be demand-driven and informed by industry.

While sector-based initiatives exist, they can be strengthened through launching more coordinated partnerships that meet regularly to be proactive about meeting the needs of the region's targeted industries. CSCLM will focus its efforts on industries with the greatest demand, highest wages, expected growth, and linkage with economic development goals. The industries that strategically align are:

- 1) Manufacturing, Logistics, Distribution
- 2) Healthcare
- 3) Information Technology
- 4) Construction
- 5) Hospitality

Sector partnerships greatly contribute to addressing any skills gap issues that exist in the community. Skills gaps can be most effectively addressed when employers come to the table and work directly with partners and service providers to brainstorm solutions – and a sector partnership can provide exactly that “table” to host the conversation. CSCLM is the go-to source of demand information by combining its current LMI capabilities with the information and needs that come directly from these conversations with employers.

In scanning our region, there are multiple industry sector advisory groups, especially in these targeted industries. These groups work as advisory committees to the instructional staff within the three school districts, our two technical centers, and our State college. These groups are vital to communicating specific curriculum design issues on the ground at the point of instruction. We are currently working with Marion Technical College and Withlacoochee Technical College to convene and plan with Industry Leaders and have added CDL, Masonry Apprenticeships and our upcoming Carpentry apprenticeship, as well as consideration to add an HVAC apprenticeship program.

CSCLM continues to build on these strong linkages to create region-wide think tanks for our targeted sectors that will look above the curriculum development level and make recommendations for certifications and degrees that are most necessary to be continued or established within our community. These region-wide sector partnerships will also provide the necessary intelligence needed to guide our area occupational demand list for ITA training and also for focusing our work-based learning strategies.

While strengthening sector partnerships will allow CSCLM and its partners to hone in on collective industry needs and trends, it is also important to continue to provide value-adding, solutions-based business services to individual businesses.

The information gathered through sector partnerships and through targeted services to individual businesses will benefit all other CareerSource services if it is shared widely with staff and other customers. Strengthening the feedback loop means ensuring that information that business-facing staff gather is shared with jobseeker-

facing staff so that jobseekers have a clear and accurate picture of what local employers are looking for in new employees. The reverse communication is just as important – staff serving jobseekers can provide business services staff with a picture of the talent pool, giving employers an idea of where to look for new talent.

Goal 2: Build on the strong service delivery structure to provide access to the comprehensive talent pool

Strategy 2.1	Expand self-service options available to jobseekers
Strategy 2.2	Expand connections to vocational rehabilitation and adult education
Strategy 2.3	Expand work-based learning opportunities
Strategy 2.4	Expand talent pool to reach professional jobseekers

Input from Board discussions and partner interviews emphasize that the services and delivery structure of CSCLM are effective and appreciated in the community. Access to services is a strength, with multiple locations found throughout the region and two mobile units that help to reach even more areas.

Leveraging technology within service delivery is one of the emphasized roles of a local board under WIOA. Finding effective ways to incorporate technology through self-service options will allow CSCLM to serve more customers and reach new populations who may not be likely to enter a CSCLM career center, such as youth or professional jobseekers. Providing more self- service options also allows case managers to focus more attention on those jobseekers who need the most one-on-one assistance.

CSCLM already has a solid foundation for collaboration with partners, such as vocational rehabilitation. Local partnering is transpiring with Vocational Rehabilitation in both Citrus and Levy counties through quarterly community partner meetings and Vocational Rehabilitation staff handling appointments and informational sessions with the Citrus and Levy County Career Centers. Since the initial development of the strategic plan we have intensified our relationships with Adult Education and Vocational Rehabilitation to find more efficiency in serving common customers or coordinating overlapping services. This means more integration of staff and efficiencies within certain programs. More collaboration and eliminating duplicity allows for an increase in both the number served and the kinds of programs offered.

The Board and CSCLM staff want to make sure the community knows that they provide services for the full range of jobseekers and businesses, including services

geared toward highly-skilled, highly-educated individuals and positions. To make sure this is apparent within the community; specific services for this category of jobseeker have been created and marketed to both businesses and candidates, addressing both the supply and demand side of talent equation. Akken Cloud, which is a robust staffing and recruiting software system, has been implemented to aid in the sourcing and management of applicants.

In Partnership with the College of Central Florida a professional career center has been developed at the Ocala campus. This partnership continues to develop and provides access to not only professional talent, but the continuously evolving talent pool of students in the college system. This career center serves the region and is open to all professional candidates and businesses. The focus for this center is more customized in approach. Staff identifies the specific need(s) of the candidate or business and work towards filling the need(s) through proactive alignment.

Goal 3: Strengthen board member engagement

Strategy 3.1	Develop a robust Board member orientation and education process
Strategy 3.2	Focus Board meetings on strategic and/or informational issues and discussions
Strategy 3.3	Ensure investments are strategic and support the organization's mission and strategic priorities
Strategy 3.4	Clarify ways for Board members to get involved outside of Board and committee meetings

Strengthening board member engagement was the second goal that board members and staff considered a top priority. With the geographic spread of board members across the region, it has been difficult to get members all in one place for meetings. To remedy this, meetings have been shifted to allow for call-in access. While this may have increased participation, it has decreased engagement. Increasing board member engagement will improve the Board's effectiveness and its ability to impact the community through its strategic plan.

To start board members off on the right foot, CSCLM has developed a thorough orientation and education process so that all board members and committee members understand the goals of the Board and their roles as members. These orientations focus on exciting board members, emphasizing their roles in carrying out the vision of the Board and the opportunities they have to contribute.

Orientations for both Board and Committee members can be found on our website: <https://careersourceclm.com/about-us/board-documents-financials/>

- Excite – Initially, it is important to excite new board members about the impact they can have through the talent development system. Promote the benefits they can expect to receive personally and professionally by engaging with the board. Share real, tangible successes of the Board and talent development systems with new board members.
- Engage – Make sure board members understand their role on the board and the value of their perspective, especially business leaders. By relating CSCLM's efforts to their business and talent development needs, board members will have a tangible understanding of how their time and efforts with the workforce system will impact growth at their business and in the community.
- Educate – The workforce system can be a complicated and sometimes confusing world. Focus board member education on the *strategic, big picture talent development strategies* first and layer tactical and operational information incrementally.

All board members interviewed saw staff as highly effective; however, they do not always understand how they as a Board can support the staff's efforts. Providing as many opportunities for board members to drive strategic decisions and get involved outside of board meetings will allow for an increased sense of contribution and impact. This could be through committee work, by volunteering in the CareerSource Centers, at events, connecting us to other employers in their field, and providing testimonials to our services. Additionally, the inclusion of staff members in the Board meetings allows for an interaction with the staff performing the day-to-day work within the Career Centers. Board members representing business should also be encouraged to utilize the services available from the workforce system if they are not already doing so.

After a strong orientation and education program, board members will be most engaged if meeting discussions are kept to a high-level, strategic focus. Ensure that for every Board meeting, a significant amount of time is spent in discussion or on Board education. One way to encourage this is through the use of a consent agenda. Items that need to be voted on can be sent to the Board in advance of the meeting for review, and therefore do not need to be covered in depth during meetings, leaving more time for strategic discussions. Board members felt that if the expectation is set with new members upfront that reviewing materials is expected before the meetings, this could be an effective tactic. In an effort to bolster the

understanding of the work done in the committees a staff member has been partnered with each committee chair and acts as an informational liaison to clarify meeting minutes, provide recaps and additional information if needed for action items and is available to assist the committee chairs in performing their meeting execution duties.

Goal 4: Serve as the convener for talent development in the area

- | | |
|--------------|--|
| Strategy 4.1 | Map existing efforts and resources for talent development in Citrus, Levy, and Marion Counties |
| Strategy 4.2 | Analyze the alignment of partner plans to identify areas of convergence and identify gaps |
| Strategy 4.3 | Identifying collaborative priorities and how individual partner efforts support these efforts |

CSCLM staff are well engaged in the community. All partners interviewed noted that CSCLM is very responsive when needs arise, and organizations routinely collaborate on individual tasks or projects. However, many noted that collaboration exists mostly on a case-by-case basis throughout the three counties and there is not a continuous outlet for discussing and tackling some of the larger, more systemic talent development issues.

CSCLM is a logical convener for this collaborative effort, especially as this work is emphasized as an important function of the Board under WIOA. With all partners at the table, the Board can lead the effort to begin mapping out all existing programs and initiatives that provide workforce development-related services to understand the landscape of the region. This will help to align goals and activities across organizations, leverage different strengths and opportunities, and reduce duplication of effort.

Serving as a convener requires a high level of effort, especially in the beginning as regular communication and interaction is initiated. Board members will have the opportunity to spread the word throughout the community; however, it will also have implications for CSCLM staff and may require some reorganization to allow for staff to be dedicated to this effort.

Goal 5: Tell the talent development story of Citrus, Levy and Marion counties.

- | | |
|--------------|---|
| Strategy 5.1 | Provide labor market information and demand intelligence for the region |
|--------------|---|

Strategy 5.2	Ensure messaging accessible and engaging
Strategy 5.3	Promote successes – not just ours, the larger community's too
Strategy 5.4	Market expanded services

CSCLM already has a great foundation for communicating its services and successes through its website, social media marketing, and promotional materials. This is a strength that has been leveraged to make sure CSCLM and the Board are the go-to resource for information about the labor market and talent development system in the region.

CSCLM already has access to and provides a wealth of labor market information to others in the area. Regular meeting with economic development and educational partners have opening the door for ongoing information sharing and has created a three point approach to local workforce problem solving.

In addition to having a consistent message, board members can help to shape communications to ensure that they are presented in an accessible and engaging way that will be understood by businesses and jobseekers who may be unaware of government programs and technical terms. To assist in this effort Ambassador packs are being made available to Board members.

Accessibility also extends to the user experience on our website. While the communication put forth on the internet is already a strength, it can be strengthened further by making it as user friendly as possible. Those who are unfamiliar with CSCLM should be able to easily understand the services that are provided and access information that is relevant to their needs. In order to understand what will create the best user experience and be most accessible to customers, the Board can research how people and businesses are currently using the website, where they go for information, and what would be the most effective mode of marketing and outreach.

The Board should be able to tell the “talent development story” for the whole region. This includes not only communicating the services and successes of CSCLM, but also from the community at large. Key audiences for information about talent development in the community include local elected officials, businesses and industry, K-12 education stakeholders (teachers, administrators, and counselors), parents, and job seekers. CSCLM can share information when employers are expanding and creating jobs, when other organizations are holding events, or when customers have success in training programs and landing a position in their career

field. These stories will help communicate who the Board is, what it supports, and the message that it promotes a community-wide, collaborative strategy toward workforce development.

- (2) Describe the local area's strategy to work with entities that carry out the core programs to align resources available to the local area to achieve the strategic vision and goals established by the local board.

- Strategy 1: Discuss and document in Memorandum of Understanding what each partner can provide and in what method.
- Strategy 2: Provide to all career center staff introductory and intermediate training on services delivered by each partner agency. This is often done through onsite training facilitated by the different partners.
- Strategy 3: Determine strengths of core programs and how to use those strengths as a core competency for the "system" and avoid duplication of efforts.
- Strategy 4: Share LMI and business intelligence.
- Strategy 5: Meet regularly to enhance services to both our job seekers and business customers.
- Strategy 6: Increase physical and virtual accessibility to our "system" services.
- Strategy 7: Share information and make referral seamless through shared data. Support a shared data system between all core programs.

- (3) Describe the actions the local board will take toward becoming or remaining a high-performing board, consistent with the factors developed by the state board pursuant to section 101(d)(6) of WIOA.

CSCLM will remain a high-performing board. Our high performance is accomplished through integrity, oversight, data analysis, continuous improvement and community dialog. We met or exceeded all negotiated measures under the WIOA Indicators of Performance for Program Year 2018/2019 as illustrated below.

Measures	PY2018-2019 1st Quarter Performance	PY 2018-2019 % of Performance Goal	PY2018-2019 2nd Quarter Performance	PY 2018-2019 % of Performance Goal	PY2018-2019 3rd Quarter Performance	PY 2018-2019 % of Performance Goal	PY2018-2019 4th Quarter Performance	PY 2018-2019 % of Performance Goal	PY 2018-2019 Performance Goals
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		Met For Q1		Met For Q2		Met For Q3		Met For Q4	
Adults :									
Empl yed 2nd Qtr After Exit	90.40	106.35	91.80	108.00	94.90	111.65	94.60	111.29	85.00
Media n Wage 2nd Quarte r After Exit	\$8,090	118.10	\$7,782	113.61	\$7,655	111.75	\$7,825	114.23	\$6,850
Empl yed 4th Qtr After Exit	88.70	108.17	85.60	104.39	89.80	109.51	89.20	108.78	82.00
Crede ntial Attain ment Rate	88.70	104.35	89.10	104.82	91.40	107.53	90.10	106.00	85.00
DW:									
Empl yed 2nd Qtr After Exit	100.00	120.48	100.00	120.48	100.00	120.48	100.00	120.48	83.00
Media n Wage 2nd Quarte r After Exit	\$11,339	165.53	\$12,569	183.49	\$12,233	178.58	\$11,003	160.63	\$6,850
Empl	85.70	114.27	88.90	118.53	100.00	133.33	100.00	133.33	75.00

yed 4th Qtr After Exit									
Crede ntial Attain ment Rate	100.00	133.33	100.00	133.33	100.00	133.33	100.00	133.33	75.00
Youth:									
Emple yed 2nd Qtr After Exit	87.00	116.00	85.40	113.87	85.50	114.00	78.10	104.13	75.00
Emple yed 4th Qtr After Exit	65.90	95.51	71.40	103.48	70.10	101.59	77.20	111.88	69.00
Crede ntial Attain ment Rate	92.80	109.18	93.90	110.47	98.50	115.88	98.50	115.88	85.00
Wagne r Peyser :									
Emple yed 2nd Qtr After Exit	66.70	107.58	66.70	107.58	67.20	108.39	68.40	110.32	62.00
Media n Wage 2nd Quarte r After Exit	\$4,841	99.81	\$4,902	101.07	\$4,997	103.03	\$5,120	105.57	\$4,850
Emple yed	69.00	107.81	67.60	105.63	66.30	103.59	66.90	104.53	64.00

4th Qtr After Exit					
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Integrity

We make sure that at every level of the organization all actions are taken with a strict adherence to guiding principles, rules, regulations and policy. We provide on-going training to board members and staff regarding their responsibility. We insure that ethical behavior is demonstrated daily. We provide easy access to guidance for all members of the board and staff. Board staff ensures that communication lines are open and that any changes or new guidance are delivered timely.

The financial integrity of our organization is important to insure the proper use of taxpayer funds. Both finance and program staff are trained to insure appropriate decisions are made, documentation is provided, and that the OMB circular 2 CFR Part 200 is followed. We protect Personally Identifiable Information and insure that all records are protected in storage, on-line or through transmission.

We treat all individuals with respect. We provide diversity training, uphold the equal opportunity laws, and seek to increase accessibility.

Oversight

CSCLM provides an active level of oversight on all programs, processes, and transactions. We monitor daily interactions and transactions through the use of data queries and separation of duties for critical actions. Separation of duties creates firewalls within our system that creates transparent oversight at all levels of the organizations.

We provide monthly reports on performance to managers and quarterly reports to the Board. The Board receives and reviews these reports in each of its five committees. We provide detailed internal monitoring of our programs, insuring compliance and will begin working with an independent monitoring firm in 2020 in an effort to create an additional firewall and another layer of transparency. All monitoring reports are submitted to management and to the Performance and Monitoring Committee. Our finances are monitored by an external auditor, who provides a report to management and to the committee. Our budgets and financial reports are reviewed quarterly by the Executive Committee. All committee reports are then part of the Full Board agenda.

Data Analysis

We use data analysis to provide the foundational work for oversight, performance, planning and outreach. Data analysis assists in showing where we are and how it relates to performance. It also assists in making sure that our strategies are being correctly implemented or if we need to change the strategy. Data analysis gives us ways to measure success, provide positive feedback, and improve.

Continuous Improvement

Continuous improvement starts with making sure that our customers are happy with the services that we provide. We use the Net Promoter System to measure our customer satisfaction at different points of service delivery. We use this information to look for areas that need improvement and make service delivery changes to impact quality. We aim to not just have satisfied customers, but to have customers who are promoters of our services and system.

We look for ways to make our system more efficient, reduce waste, and save time. Process improvement results in more time to work one-on-one with our customers.

We scan the environment. We look for changes on the horizon and gain knowledge as needed by those changes. We look at how others are “doing workforce” and we learn from them, both here in Florida and across the Nation. We openly share with others to enhance the whole system.

Community Dialogue

We are constant attendees at community meetings. We are active with the Chambers, Economic Development Agencies, Education, Transportation, Homelessness, Early Childhood, Law Enforcement, Re-entry, SHRM, and other agencies and groups that serve our mutual customers. Being entrenched in our communities helps us to be on the cutting edge in program development.

We welcome input and suggestions from the community and customers. We strive to be responsive to these stakeholders.

- (4) Describe service strategies the LWDB has in place or will develop that will improve meeting the needs of customers with disabilities as well as other population groups protected under Section 188 of WIOA and 29 CFR Part §38.

Strategy 1: Ticket to Work. We have been a Ticket to Work Employment Network (EN) for five years. This program encourages individuals who are receiving Social Security Disability to engage in work without the fear of losing their benefits. Staff

are dedicated to assist these individuals in preparing for job search, placement and follow up activities. Our full service flagship career center provides work incentives and disability benefits counseling provided by a staff member who is a certified Community Partner Work Incentives Counselor. Providing this service on-site ensures that job seekers with disabilities who are considering entering or returning to the workforce are presented with all the options and can weigh all the implications a return to work entails.

Strategy 2: Accessibility of services. (1) All of our sites including our mobile units are accessible and in conformance with the ADA. We insure that any new training provider is accessible by conducting an on-site review prior to placing on ETPL list. (2) Multi-Lingual staff are present on site to assist with necessary translation. The most used forms have been translated into Spanish to assist our Spanish speaking customers. (3) We have a strong working relationship with the Center for Independent Living. They provide training to staff, and provide sign language interpretation services as we need them. (4) As we update our website, we will be including a translatable format to increase our on-line accessibility. We insured that our phone message for SNAP was in both English and Spanish. We have also contracted with Universal Tech. Translation Service a provider for interpreting service for use in the event we have speakers of other languages other than English or Spanish. This service is used via telephone so the staff will need to go into the designated safe room with the candidate when using this service since they will need to put the call on speaker, it is accessible via telephone conference call using a designated PIN number.

Strategy 3: Connections with Homeless organizations. The causal effect of disabilities and lack of access to training can often result in homelessness. We have close linkages in our region with the homeless councils and Continuum of Care to ensure the best possible services in our region. We work with other homeless serving agencies to train them on our services, Employ Florida (statewide labor exchange system), resume production and sharing of information for expedient service. They also in turn train our center staff on what services are available so that we can find resources to assist our homeless or at-risk customers.

Strategy 4: Services to Veterans. Through our VETS program we work directly with community agencies serving veterans and provide outreach to encourage veterans that are in need of job seeking services to use our resources. We train other agencies on EF and keep in contact in order to fill our system job listings with veterans first. Veterans who have disabilities are served directly by either our frontline staff or if the disability warrants special services they are then served by our

Disabled Veteran Outreach Program (DVOP) staff. Our close linkage with the community provides us with the knowledge needed to help our veterans not only find employment but to assist with other issues that they may be struggling with. We also work through our Business Services unit to provide strong linkages with business for hiring a Vet and for job fairs such as Paychecks for Patriots. We are committed to provide priority services to our veterans.

Strategy 5: Services to Youth. We focus our youth services on out of school youth who are the most in need. Our youth typically have multiple barriers to employment and often these barriers can interrupt their access to services as needed to progress to self-sufficiency.

(1) Our provider of youth services is well integrated with law enforcement partners. Our team looks at ways to partner on job fairs and to assist in transitioning youth from facilities statewide back into our area. We are currently working with the Marion County Sheriff's Department to provide service overviews to pre-release youth to assist in a smooth transition back into society.

(2) Recruitment of youth is conducted with other youth serving agencies to ensure that we are serving those most in need. We primarily focus on recruiting youth who are homeless, lacking a diploma, engaged with the juvenile justice system, foster youth, youth from distressed and poor neighborhoods and those challenged with disabilities.

(3) Our YouthBuild program is called Phoenix Rising. This program has been in place for 10 years and has built a total of 16 homes in economically distressed areas in our service area. Our current program is set to begin in Spring 2020 and is slated to build four more homes. This program teaches soft skills, provides for a diploma, teaches construction skills and other certifications and places them in employment or post-secondary education. All of this plus the ability to provide a home for a family, the youth learn how to give back to their community and be a hero for someone else.

- (5) Describe the process used to develop your area's vision and goals, including a description of participants in the process.

CSCLM vision and goals were developed in 2015 in an effort to align our goals and strategies with WIOA. This work was conducted by the CSCLM Board in a discussion format. The board reviewed a skills gap analysis that was completed the prior year, compared this data with up to date LMI for the region, reviewed commuting data and solidified the strategic plan. Input has been provided in both round table formats and discussion groups and on individual meeting basis, primarily in the development of MOUs. We received input from the following entities:

- Department of Juvenile Justice
- Community Development and Block Grant administrators
- International Brotherhood of Electrical Workers

- Key Training Center
- Center for Independent Living
- Citrus Hearing Impaired Program
- North Central Florida Regional Housing Authority
- Ocala Housing Authority
- Ocala Human Resource Managers Association (SHRM for Citrus & Marion)
- Marion Technical College
- Withlacoochee Technical College in Inverness
- College of Central Florida covering Citrus, Levy and Marion counties
- Rasmussen
- Taylor College
- Department of Children and Families
- Apprenticeship section of the DOE
- Experience Works
- Mid-FL Regional Manufacturers Association
- Health Care Round Table
- Community Action Agencies (Central and Mid-Florida)
- Citrus, Levy and Marion Economic Development agencies & government liaisons
- Kid's Central
- Pace Center for Girls
- Marion County Homeless Council & Continuum of Care
- County Veteran Services
- Silver River Mentoring and Instruction
- Marion County Early Learning Coalition
- Nature Coast Early Learning Coalition
- Arnette House for Youth

(6) Describe how the LWDB's goals relate to the achievement of federal performance accountability measures to support economic growth and self-sufficiency (WIOA §108(b)(1)(E)).

Federal performance measures focus on employment, skill development, attainment of diplomas and certificates and wage progression. CSCLM provides strategies that support the growth of our local economies. We insure that our strategies are supportive of the strategies that our local governments and economic developers have developed. Our strategies seek to train the available workforce in skills that are needed in our current economy and for those emergent jobs that will be available in the future. We seek continued and constant input from our businesses and business groups to determine specific areas for training and recruitment. A healthy and growing economy makes it possible for our performance standards to be exceeded.

- We seek methods to assist our job seeking community with eliminating barriers to employment. We offer a full array of workshops to the public that help them to be competitive in landing a job and progressing through their

career. We provide services to all levels of job seekers from entry level to professional.

- We provide support services and referrals to other agencies that make it possible for individuals to successfully complete training or to be competitive in their interviews with businesses.
- We are nimble in our provision of services to both candidates and the business community. We change the delivery of service as needed to meet the needs and look at ways to say yes to a situation that will result in a positive outcome.

(7) Indicate the negotiated local levels of performance for the federal measures (WIOA §108(b)(17)).

Our negotiated levels of performance for Program Year 2019/2020 are outlined in the table below. We are exceeding all measures so far for the year thanks to the hard work and dedication of our staff.

Measures	PY2018-2019 4th Quarter Performance	PY 2018-2019 % of Performance Goal Met For Q4	PY 2018-2019 Performance Goals	PY2019-2020 1st Quarter Performance	PY 2019-2020 % of Performance Goal Met For Q1	PY 2019-2020 Performance Goals
Adults:						
Employed 2nd Qtr After Exit	94.60	111.29	85.00	96.00	112.68	85.20
Median Wage 2nd Quarter After Exit	\$7,825	114.23	\$6,850	\$7,088	103.47	\$6,850
Employed 4th Qtr After Exit	89.20	108.78	82.00	91.90	111.39	82.50
Credential Attainment Rate	90.10	106.00	85.00	89.40	101.59	88.00
Dislocated Workers:						
Employed 2nd Qtr After Exit	100.00	120.48	83.00	100.00	120.19	83.20
Median Wage 2nd Quarter After Exit	\$11,003	160.63	\$6,850	\$12,991	189.65	\$6,850
Employed 4th Qtr After Exit	100.00	133.33	75.00	100.00	131.58	76.00
Credential Attainment Rate	100.00	133.33	75.00	100.00	132.98	75.20
Youth:						

Employed 2nd Qtr After Exit	78.10	104.13	75.00	77.70	102.91	75.50
Employed 4th Qtr After Exit	77.20	111.88	69.00	81.60	117.92	69.20
Credential Attainment Rate	98.50	115.88	85.00	98.00	114.89	85.30
Wagner Peyser:						
Employed 2nd Qtr After Exit	68.40	110.32	62.00	72.40	116.40	62.20
Median Wage 2nd Quarter After Exit	\$5,120	105.57	\$4,850	\$5,321	109.71	\$4,850
Employed 4th Qtr After Exit	66.90	104.53	64.00	67.30	104.83	64.20

- (8) Describe indicators used by the LWDB to measure performance and effectiveness of the local fiscal agent (where appropriate), contracted service providers, and the one-stop delivery system in the local area (WIOA §108(b)(17)).

Fiscal Agent

CSCLM is the fiscal agent. Indicators used to measure performance are provided through monitoring that is provided by DEO, local monitoring through independent agreed upon procedures, and independent auditing. Monthly reports are also compiled by the finance department and forwarded to the Chief Executive Officer and Executive Vice President for review. Quarterly reports on budget vs expenditures are submitted to the Board for review.

Contracted Service Providers

The only contracted service provider at this point in time is our youth services contract with Eckerd Connects. This contract is monitored annually by our internal monitoring staff and is also monitored by DEO. We provide oversight of the program by continuous review of data that details the effectiveness of the programs and insures performance. The reviewed data looks at: numbers enrolled, exits, positive outcomes, placements, follow-up, post-secondary enrollments, and certifications. We also review invoices and documentation for contractual payments and payments of performance benchmarks.

The Career Services provider is currently CSCLM. We have been approved by CareerSource Florida on behalf of the Governor to provide services within the One Stop system.

We review a multitude of reports to measure effectiveness of operations. We have established a system of firewalls to insure appropriate oversight and we review reports provided by DEO on their site and on the Florida Workforce Integrated Performance Reporting System (FWIPRS). We also provide our own queries regarding performance that is required at the federal, state or local level. These reports are pulled weekly, monthly and quarterly. Indicators we review include but are not limited to: Placements, Job Postings, Job fill rate, wage at placement, retention, completion rate, participation rate, certifications, program enrollments, cost per, business penetration, Net Promoter Score, Career Center Traffic,

One Stop Delivery System

CSCLM defines the One Stop Delivery System to be the whole system within our area. This includes the "Career Centers" and the affiliate sites and partners throughout our area. We have established required and additional MOUs with our partners and have determined how best to partner, share resources, and create a resource rich One Stop Delivery System. We project that additional information that we will want to review for effectiveness will include: Numbers served by location, partner services completed in centers, placements and wages by site. We support and encourage the sharing of information and the development of a shared data system for the primary core services.

One Stop Operator

Thomas P. Miller and Associates was procured to be our One Stop Operator in the spring of 2016 (effective 7-1-2017). Operation consists of review of customer/work flow within the centers, services and partner integration between programs and best practices from One Stop systems across the nation. Performance is judged on specific benchmark goals and activities detailed in their cost reimbursement contract, and are reviewed quarterly by the Board.

(9) Describe the definition of "self-sufficiency" used by your local area (WIOA §108(b)(1)).

ADULTS

Low-Income: Earning a rate of pay at the local wage sufficiency rate as determined by DEO or less than 200% of the Lower Living Standard Income Level based on family size.

Self Sufficiency: Defined as making at least 200% of the poverty rate and is also the threshold used to determine adult eligibility:

2019 Lower Living Standard Income Level (LLSIL)

Example is a family of one (1):

\$13,778 (Poverty) \$27,556 (200%)

Dislocated Workers

Earning a rate of pay representing the hourly equivalent of 80% of the layoff wage.

Employed Worker

Based on the average wage of occupations in the Ocala SA associated with the targeted industries in the CSCLM area, it has been determined the self-sufficiency wage level for employed workers is \$29.06 per hour or \$60,462 annually, which allows for an increase to the skill levels of the existing workforce to meet the needs of the business, to leave no worker behind in obtaining and retaining employment opportunities, and to continuously foster economic growth.

COORDINATION OF SERVICES

- (1) Coordination of Programs/Partners:** Describe how individualized career services are coordinated across programs/partners in the one-stop centers, including Vocational Rehabilitation, Temporary Assistance for Needy Families (TANF) and Adult Education and Literacy activities. Specify how the local area coordinates with these programs to prevent duplication of activities and improve services to customers.

CSCLM has long maintained a holistic approach to partner programs in the workforce system. Aside from Vocational Rehabilitation, Pinellas County Urban League (Urban Older Worker Job Program) and Adult Education providers, all other partner programs are managed directly by the LWDB. Acting under a waiver provided by CareerSource Florida, as provided by the governor, direct management occurs for Wagner Peyser, Workforce Innovation and Opportunity Act (WIOA), Trade Adjustment Act (TAA), Veteran services, Welfare Transition (WT) and the Supplemental Nutrition Assistance Program (SNAP). Youth Services are provided in our three county area under a service provider agreement with Eckerd Connects. To best achieve seamless coordination of services across in-house partner programs, CSCLM has developed two service level options and a common intake process for all customers.

The first service level option is Self Service, or Basic Career Services. This option is available to customers that simply wish to utilize basic services and technology without the need for interaction with staff beyond simple questions and answers. This option works for customers who have a firm grasp on their employment goals and may only need to complete specific tasks such as online job searching, printing resumes, filing for reemployment benefits, etc.

The second service level option is for customers that wish to access the next level of Basic and Individualized Career Services (TEGL 3-15). Our Career Success Plan is a structured intake process that gathers necessary information from new customers at their time of entry into the system. Regardless of the desired service or level of

services we have identified a need to gather specific baseline information in order to best assist and 'triage' customers to the appropriate partner program.

Customers are asked to complete a services application, watch an online orientation or attend an in-person orientation to our menu of services and most importantly enter a full Employ Florida (EF) registration including the development or upload of a current resume. Upon completion of the Career Success Plan Intake, the customer meets with a Career development Coach that reviews their information and provides additional details on services that may benefit them and outlines their next steps. Next steps may include (but not limited to):

- Community agency referrals
- Referral and establishment of an appointment for additional career consultation
 - Initial assessment
 - Placement assistance
 - Job referrals
 - Resume Review and Critique
 - Skill Testing (Prove it, Ready to Work, Soft Skills)
 - Provision of LMI
- Referral to CSCLM employability workshops
- Referral to Individualized Career Services (WIOA, WTP or TAA)
- Referral to our Youth Services provider (WIOA)
- Referral to Ticket to Work
- Referral to Vocation Rehabilitation
- Referral to Adult Education
- Referral to the next Welfare Transition or SNAP orientation
- Referral to a Veteran representative for veterans with significant barriers to employment (SBE)

To meet the needs of customers that wish to access services in person and those that prefer to access digitally; this process is available at our brick and mortar locations as well as through our website in online modules and through the use of video chat. Online completers have the option to schedule a personalized appointment with staff upon completion. They may also continue to access services over the phone or through video chat if they prefer not to visit a physical location. At any time a customer may be dually enrolled in a partner program depending on their need. Staff work together to blend and braid services so that the customer does not feel they are being forced to jump through hoops to access the services needed. This close partnership among the programs creates a complete package of services and support services the customer can access to meet their goals.

Since the enactment of the WIOA, we have been proactive in having ongoing discussions with both Vocational Rehabilitation (VR) and Adult Education. CSCLM is currently an Employment Network with the Ticket to Work program, along with a Partnership Plus and pre-employment services provider.

Adult education is a critical component to the development of a quality workforce. All of our Adult Education partners work closely with our case management staff to identify individuals who may qualify for funding assistance under the SNAP, WT and WIOA programs. Our partnerships gained a better foot holding several years ago when charges were placed on GED classes. The costs of the classes and testing became overwhelming for many individuals who were already in the low income or dislocated classifications. Close communication and inter-organizational referrals allowed us to screen enrollees for our various funding streams to assist as many students as possible.

- (2) Coordination with Economic Development Activities:** Describe how the local board coordinates workforce investment activities carried out in the local areas with economic development activities carried out in the local area (or planning region) in which the local area is located and promotes entrepreneurial training and microenterprise services (WIOA §108(b)(5)).

CSCLM has long standing partnerships with the Chamber and economic development organizations in our three county area. Our partner organizations are the Citrus County Economic Development Department, Citrus County Chamber, Nature Coast Business Development Council (Levy County), and the Ocala/Marion County Chamber and Economic Partnership (CEP) (Marion County). We have representation on our Board of Directors from each of the three organizations. Staff from our Business Services unit works closely with area EDC staff for a broad range of projects. CSCLM staff is involved in talent recruitment and training development for new and existing businesses, complementing the services of the ED organizations and creating a 'one-stop shop' approach. Staff also work with EDC staff to prepare talent and training availability reports and labor market information for new business development and attraction endeavors.

Each of the EDC's are instrumental in the development and shaping of our Area Targeted Occupation List. This list serves as the primary tool for sharing WIOA approved training and career paths for our area to the public. Discussions with the EDC's involve identifying current business needs as identified from their viewpoint as well as possible training and development that should begin occurring to assist in their business attraction and expansion efforts. This collaboration allows us to begin talent development before a critical need is identified and develop a qualified workforce prior to a business moving to the area.

Additionally, the local division of the Small Business Development Council (SBDC) is co-located with the CSCLM administrative offices on the Ocala campus of the College of Central Florida. Our staff works regularly with the SBDC to form business solutions through combined efforts. CSCLM has been an information access point for individuals and small businesses utilizing the services of the SBDC and has presented various workshops to assist the individuals and businesses in their talent development and training efforts.

CSCLM, the Small Business Development Center, Mid-FL Regional Manufacturers Association, Ocala Human Resource Management Association, and College of Central Florida formed a partnership, the Business and Career Resource Cooperative (BCRC), which focuses on small business to provide training, workshops and information to support the local small business needs.

CSCLM partners closely with the Mid-Florida Regional Manufacturers Association (MRMA), whose Executive Director is co-located in our administrative offices. This direct linkage helps enhance services and provide daily intelligence on the sector, and this ensures direct communication with CEO and the Business Services staff. This is accomplished through an employment sharing arrangement where the work conducted is on behalf of MRMA and CSCLM. This provides in-depth intelligence on hiring needs, salary structures, growth strategies and training needs for the benefit of CSCLM planning and implementation purposes. This has proven to be of great value to our manufacturing community.

- (3) Coordination of Education and Workforce Investment Activities:** Describe how the local board coordinates education and workforce investment activities carried out in the local area with relevant secondary and postsecondary education programs and activities to coordinate strategies, enhance services, and avoid duplication of services (WIOA §108(b)(10)).

CSCLM actively works with the school boards in the development of their Career and Professional Education Act (CAPE) programs. CSCLM and school boards work together to establish and validate the needs of their technical training programs through real time labor market data.

CSCLM also works with each of the school board's adult education arms in the development of their AGE (Adult General Education) and Perkins grant applications to insure that the services delivered mirror the strategies established by the local workforce board.

CSCLM currently staffs and operates the placement assistance office for the College of Central Florida. Our current office is located in the Enterprise Center on the campus of the College of Central Florida in Ocala. This office provides job coaching, workshops and professional placement services for students attending classes at all of our educational providers. It also provides professional level employment services to individuals that enter our system that meet the local criteria for being classified as a 'professional':

- Attained an Associate's Degree plus five (5) years of experience, or
- Attained a Bachelor's Degree, or
- Have 5 years professional experience making \$40K per year or more

This location holds joint branding and staff from the college to facilitate full integration of technical, industry driven educational services available as well as internship opportunities provided through the college for graduates. The internships

provided through the college are melded with CSCLM's initiative of creating industry driven, paid internships and work experience opportunities for recent grads and professionals that require additional practical experience to become employed.

The partnership with the college allows us to identify students coming out of internship programs and will soon be graduating. This allows for direct linkage of trained and experienced talent to local businesses in our area.

Additionally, staff from this office travel throughout the three county region in coordination with CSCLM's workshop coordinator to provide a wide range of workshops to students in K-12, Adult Education, career and technical and college programs with a focus on professional development. These workshops often include:

- Information on CSCLM and available services
- Interviewing skills
- Soft Skills workshops
- Targeted resume development
- Use of social media in your job search
- Navigating the New World of Work (our fundamental workshop for approaching a job search in the digital age)
- Information on grants and other tuition assistance programs

Additionally, we host the Youth Career Expo in each of our three counties. This event is a partnership between the College of Central Florida, Marion County School Board, Community Technical and Adult Education, Ocala/Marion County Chamber and Economic Partnership and the Mid-Florida Regional Manufacturers Association, Citrus County School Board and the Levy County School Board. The Youth Career Expo is hosted in Citrus, Levy and Marion Counties and will be attended by nearly 1200 middle and high school students with participation from over 90 businesses and 120 community volunteers.

The Youth Career Expos are aimed at students in the K-12 system that have been identified as wishing to pursue careers in one of our targeted industries. Students from the school systems will be transported to the events in multiple waves and will have the opportunity to speak with industry specialists about the work they do, typical work environments and the training and certifications required. Students will also be able to meet with area educators to discuss their next steps needed to become equipped for local business expectations. This annual event is held to spark interest in targeted occupations and drive students into technical and degreed career pathways that will provide quality opportunities to support the local economy.

- (4) Coordination of Transportation and Other Supportive Services:** Describe how the local board coordinates workforce investment activities carried out under this title in the local area with the provision of transportation, including public transportation, and other appropriate supportive services in the local area (WIOA §108(b)(11)).

CSCLM understands the importance of supportive services in insuring a customer's success in training or employment programs. Because CSCLM provides direct management of the career centers in our area, programmatic coordination of supportive services is made easier. Customers receiving individualized career services through WIOA, TAA, WT, SNAP or any of our competitive grants (YouthBuild, Sector Initiative) are eligible to receive support services if the need is deemed appropriate by the customer's case manager. Full integration of partner programs within our system allows us to braid and blend funding sources to maximize resources and provide quality assistance to our customers.

WIOA/WT/Competitive grants Support Services:

- Travel Assistance up to \$10.00 weekly or \$50.00 monthly for full time participation
 - Additional out of area mileage reimbursement
- Bus Passes
- Childcare Assistance
- Needs Based Payments

TAA Support Services:

- Travel Assistance for out of area job search/training
- Relocation Assistance

SNAP Support Services:

- Travel Assistance up to \$25.00 monthly

Services may be blended based on funding availability and program eligibility.

- TAA may be served under Dislocated Worker
- WT may be served under Adult or Dislocated Worker
- SNAP may be served under Adult or Dislocated Worker

Funding for support services is limited, so staff provides customer referrals to other community service agencies when funding exists to maximize local resources.

- (5) **Coordination of Wagner-Peyser Services:** Describe plans and strategies for, and assurances concerning maximizing coordination of services provided by the state employment service under the Wagner-Peyser Act (29 U.S.C 49 et seq.) and services provided in the local area through the one-stop delivery system to improve service delivery and avoid duplication of services (WIOA §108(b)(12)).

As mentioned in previous sections, CSCLM is currently providing direct management of the career centers in our area. Under this management structure

the following required partner programs exist in each of our brick and mortar locations:

- WIOA Adult, Dislocated Worker and Youth
- WIOA Wagner-Peyser
- Veterans Employment and Training
- Trade Adjustment Act
- Re-employment Assistance Navigation
- RESEA
- Temporary Assistance for Needy Families
- Supplemental Nutrition Assistance Program

Most of the services provided under Wagner Peyser act as the gateway to Individualized Services under other partner programs. Many customers visit a center with basic needs, not fully understanding the entire scope of services available to them. Through effective assessment and triage many Wagner Peyser customers move to Individualized Services under partner programs. Other customers that wish to conduct self-paced and independent job searching may do so.

- (6) Coordination of Adult Education and Literacy:** Describe how the local board coordinates workforce investment activities carried out under this title in the local area with the provision of adult education and literacy activities under Title II in the local area, including a description of how the local board carries out, consistent with subparagraphs (A) and (B)(i) of section 107(d)(11) and section 232, the review of local applications submitted under Title II WIOA §108(b)(10).

As mentioned in #3 of this section, we are currently working on several projects to strengthen the partnerships with our educational partners as well as bridging the gap between private industry and curriculum development. The selection process and maintenance of our Area Targeted Occupation List (ATOL) is a continuous process that involves our business led committees and Board of Directors. All targeted sectors and their associated occupations as well as the occupations listed on our Area Targeted Occupation List are reviewed and approved by our Career Center Committee and the full Board. This allows for a thorough review of the entire Board membership and input from the private industry members who comprise the majority of the Board.

CSCLM has a local guidance policy (OPS-28 Area Targeted Occupation List and Training Provider Selection) specifically detailing our local policy and procedures for selecting providers and programs for inclusion on our Area Targeted Occupation List. Our intent is to retain specific requirements as defined locally for approval of providers AND programs.

Provider approval requirements:

1. At a minimum, all training providers wishing to be listed on the local eligible training provider list must:

- Be either (a) a licensed public, post-secondary education institution eligible to receive funds under Title IV of the Higher Education Act, or (b) a private educational institution accredited and fully licensed by the Florida Department of Education (FLDOE), Commission for Independent Education (CIE); or similarly licensed in the state where they originate.
 - Meet ADA requirements and sign a certification of compliance with ADA; if applicable.
 - Agree to provide performance, programmatic and institutional information on an annual basis and/or when requested by CSCLM (as applicable).
2. Additionally, all providers must:
- a. Provide educational services:
 - Within Citrus, Levy or Marion counties, OR
 - Be listed on the eligible training provider list for the workforce region in which they provide services
 - b. Allow for a site visit by CSCLM staff prior to final approval.
 - c. d. Any provider that is determined to have provided inaccurate information or to have violated any provision of the WIOA shall be removed from the eligible training provider list and may be liable to repay all training funding received during the noncompliant period.
 - e. For continued eligibility, training providers must:
 - Maintain proper accreditation and/or licensure through the Commission for Independent Education or applicable state agency, and provide a copy to CSCLM on an annual basis
 - Continue to supply timely student based information to FETPIP and CIE, as required.
 - Provide updated training program information, i.e., new catalog, specific program updates and cost changes.
 - Continue to meet established performance criteria as established by the CSCLM board.

Program approval requirements:

1. All locally approved training programs must have been offered by the approved institution for a minimum period of 12 consecutive months.
2. All proposed programs must (a) be listed on the Department of Economic Opportunity (DEO) issued State or Regional Targeted Occupation Lists, (b) be fully accredited, and (c) allows for the issuance of credentials upon training completion (certificate, degree, diploma) or skills and competencies recognized by businesses.
3. All locally approved training programs must meet at least one of the criteria listed below based on data provided by:

- a. FETPIP
 - an 80% completion rate with at least 70% of the completers found in employment, or
 - an 80% placement rate of training completers (training related placement not required), or
 - a 70% completion rate with one of the following:
 - Placement wages equal to or above the local Lower Living Standard Income Level (LLSIL), or
 - 90% placement rate of training completers (training related placement not required)
- b. Local Management Information System (MIS)
 - previous 12 months of local WIA/WIOA/WT placement data that shows all of the following:
 - At least 80% successful program completion rate of trainees no longer in training activities;
 - At least 90% of training completers with employment at closure, OR
 - 80% of training completers with Training Related Placement at closure
 - Average employment wage rate at closure represents 90% of the local LLSIL.
- c. Local
 - Quantifiable local data that exhibits an immediate or projected need for training in a specific occupation or occupational field (data approved by the appropriate CSCLM Committees and Board).

All provider and proposed program applications will be reviewed by the Director of Operations and/or the Assistant Director of Career Services for qualification of performance standards listed above upon receipt. Applicants that do not meet standards will be notified in writing of such determination.

Applications that meet the standards established in local policy will be recommended for review by the CSCLM One Stop Committee and Board of Directors. All applications must be reviewed and approved by the full CSCLM board prior to being added to the local ATOL.

Additionally CSCLM is working to establish offerings and referrals for English for Speakers of Other Languages (ESOL) courses as well as GED classes. Our partnership has developed a joint understanding of our eligibility and enrollment requirements, leading our Adult Education partners to make quality referrals to CSCLM staff when they identify a customer that may be eligible for WTP, WIOA, TAA, or SNAP funding.

- (7) Reduction of Welfare Dependency:** Describe how the local board coordinates workforce investment activities to reduce welfare dependency, particularly how services are delivered to TANF and Supplemental Nutrition Assistance Program (SNAP) recipients, to help individuals become self-sufficient.

CSCLM leverages resources from all partner programs to assist our WTP and SNAP recipients become self-sufficient. All participants are screened for services that can be provided through WIOA, TAA, competitive grants and career services provided through Wagner Peyser and Veteran Services. Our work-based training services offer a wide array of opportunities to assist in the job development and placement of candidates. Aside from internal partner programs we also communicate regularly with community partners to garner access to additional resources and employment opportunities.

Strategies to assist in placement efforts include resume development and marketing of candidates to our internal Business Services staff who act as ombudsmen to market candidates to local businesses. Hiring incentives offered through work-based training solutions such as OJT, Paid Internship and Work Experience and Custom Business Training also provide opportunities for a harder to serve customer base that may have limited skills.

- (8) Cooperative Agreements:** Describe the replicated cooperative agreements (as defined in WIOA section 107(d)(ii)) between the local board or other local entities described in section 101(a)(11)(B) of the Rehabilitation Act of 1973 (29 U.S.C 721(a)(11)(B)) and the local office of a designated state agency or designated state unit administering programs carried out under Title I of such Act (29 U.S.C. 721(a)(11) with respect to efforts that enhance the provision of services to individuals with disabilities and to other individuals, such as cross-training staff, technical assistance, use and sharing of information, cooperative efforts with employers and other efforts of cooperation, collaboration and coordination.

The cooperative agreements that have been negotiated focus on the in-kind contributions of both Vocational Rehabilitation and Blind Services. It is often understood between agencies that the best service one can provide is full understanding of what you can provide. Our MOUs focus on cross training between the partners that will lead to better understanding of services provided resulting in more efficient service delivery, reduction in duplicity of services and more effective referrals. All agencies can value the contributions that the others bring to the table and display those contributions in the MOUs.

Division of Vocational Rehabilitation

Vocational Rehabilitation, while not housed in the One Stop center, is located several hundred yards from our comprehensive center. This close proximity has allowed us to easily exchange referrals and keep open communication between our agencies. We have been working on several projects with VR to provide services to individuals with disabilities as well as conducting cross training between workforce and VR staff to share and develop a full understanding of services available to our mutual customers. Several of those projects include:

- VR staff training on the Employ Florida labor exchange system.
- CareerSource CLM staff training on services and service availability through VR
- Ticket to Work Employment Network participant

- Initial stages of developing curriculum for youth pre-employment training services
- Offering of workshops to VR customers at our locations, and information on hiring events and/or other services that would be of value to their customers

Florida Department of Education, Division of Blind Services

CSCLM maintains a full assortment of assistive technology geared to assist all individuals with disabilities in their job search and employment related needs; particularly those with visual disabilities. Their knowledge of assistive technologies is a tremendous help to the CareerSource CLM staff in understanding how to best use the equipment available in our offices resulting in gains for our mutual customer base. Periodic training is provided to CareerSource staff as a refresher and to ensure our equipment is in good working order.

DESCRIPTION OF THE LOCAL ONE-STOP SYSTEM

(1) General System Description: Describe the one-stop delivery system in your local area, including the roles and resource contributions of one-stop partners (WIOA §108(b)(6)).

- A. Describe how required WIOA partners contribute to your planning and implementation efforts. If any required partner is not involved, explain the reason.

CSCLM Board, with the concurrence of the chief elected officials, requested and received the authority to function as the direct service provider of the area's one-stop services system. With the assumption of this responsibility, the local area's workforce business-led system was restructured in a manner that minimized the impact of budget reductions on our unemployed customers, and reshaped and consolidated services for a more efficient system of connecting customers to opportunities with local businesses.

CSCLM delivers all programs and services to customers through its fully comprehensive and diverse workforce development One Stop System. This system is both physical and technological – providing access with a “physical front door” which is through our three Career Centers located in Citrus, Levy and Marion Counties and through “electronic access”. Other required One Stop Partners have been fully willing to negotiate MOUs and coordinate services and provide representation on our board. Community partners allow access to provide mobile One Stop services in outlying areas where transportation to a brick and mortar facility can be challenging for some of our customers.

In the effort of reaching graduates and professionals, CSCLM, in partnership with the College of Central Florida (CF), created a professional center that is located at the College and supported by staff from both agencies. This center was developed to be a mechanism of connectivity for businesses, graduates, professionals and customers in training to assist them in successful employment culmination.

CSCLM operates two mobile units that cover our tri-county area on various days, bringing career center services and programs to those who find it difficult to come to the brick and mortar centers, or those who lack internet to connect remotely. The workforce development system connects many agencies and programs. Within the center in Marion County, older worker Services and Community Action are both housed within the One-Stop. Other partner agencies are reached through our technological and referral door or visit the centers occasionally or as needed to meet with mutual customers.

Under the business model of CSCLM, the following Local One Stop System is in place. The dual goals of workforce development are to provide the talent and skills businesses need to produce and deliver goods and services, as well as raise living standards of working families in America. In order to achieve both of these goals, it is critical to:

- Understand the local labor market and forge strategies to serve both businesses and workers;
- Give candidates and workers effective counseling and access to appropriate training to enable them to earn family-sustaining wages, and
- Assure that the dollars spent on workforce and economic development are spent wisely.

CSCLM's goal of providing a full array of Welfare Transition, SNAP, WIOA, TAA and Wagner-Peyser services, career services and training to our area residents which will assist them in obtaining employment; along with the business-driven services of the Business Services unit, is attained by providing:

- Extraordinary customer service; outreach and recruitment; orientation for services; registration for work; resource area management and coordination; operation of job search assistance workshops; referral to appropriate work or training activity
- Employment referrals; development of employment opportunities; development of subsidized/ un-subsidized employment opportunities
- Eligibility determination; individualized employment plans; referrals to objective assessment services; case management, general and intensive
- Coordination and provision of support services; post placement and job retention follow-up
- Maintenance of records and reporting; individual training accounts management; customer payments (tuition, books, fees, day care, transportation and other support services)
- Veteran services; Job Corps referrals
- Special grants/contracts management; volunteer staff management
- Older Worker services – co-location of staff onsite at the career center.
- Working with faith based and community organizations

- Coordination with Community Action
- Provision of YouthBuild services

All services as a whole are reviewed for efficiency and cohesiveness by our One Stop Operator.

- B. Identify any additional partners included in the local one-stop delivery system.
- Supplemental Nutrition and Assistance Program (SNAP) Employment and Training program;
- SSA Employment Network and Ticket to Work program along with a CareerSource Citrus Levy Marion sustained Disability Employment Initiative program; and

CSCLM continually seeks out opportunities within the region to develop Workforce Services Agreements with partner organizations including community-based, faith-based, and/or nonprofit organization, as well as employment, education, and training programs that align with our vision mission and strategic goals.

Ongoing partnership development is paramount to our success by ensuring that we are sharing promising and proven practices by doing what is best for our communities to enhance the overall economic development.

- C. The local workforce development board, with the agreement of the chief elected official, shall develop and enter into a Memorandum of Understanding (MOU) between the local board and the one-stop partners.

(Attachment 4)

(2) Customer Access: Describe actions taken by the LWDB to promote maximum integration of service delivery through the one-stop delivery system for both business customers and individual customers.

- A. Describe how entities within the one-stop delivery system, including one-stop operators and one-stop partners comply with the Americans with Disabilities Act regarding physical and programmatic accessibility of facilities, programs and services, technology and materials for individuals with disabilities, including providing staff training and support for addressing needs of individuals with disabilities. Describe how the LWDB incorporates feedback received during consultations with local Independent Living Centers on compliance with Section 188 of WIOA (WIOA §108(b)(6)(C)).

All CSCLM offices are ADA compliant and reviewed at minimum once per year for all aspects of continued compliance by the CSCLM quality assurance unit. Additionally, CSCLM has an operating policy detailing the strict programmatic accessibility standards that we hold (*OPS-78 Program and Services Accessibility*).

Each CSCLM office is equipped with a full line of assistive technology to assist individuals with disabilities to include technology to assist visual and hearing impaired individuals. Additionally, all public forms and publications include our standardized notice of EEO compliance:

“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.”

CSCLM is a community partner with the Center for Independent Living (CIL). Partner meetings have been the basis for the development of a Memorandum of Understanding (MOU). This MOU includes periodic and cross agency staff training to not only insure excellent service to individuals entering a career center, but also to insure that all CIL staff are fully aware of, and know how to access our full line of services.

- B. Describe how entities within the one-stop delivery system use principles of universal design in their operation.

Use of universal design is recognized for creating a more equitable and cost efficient work space. Whenever possible, CSCLM uses universal design features to enhance our office experiences. Below is a list of examples of how universal design streamlines the career center experience:

- Collateral available in English and Spanish
- Universal application/enrollments provides expedited movement between partner programs
- Flexible work space within each center to accommodate all users
- Services available in ‘self-service’ format, or available in a staff assisted, one-on-one environment
- All enrollment/application processes are streamlined to essential data
- Sign in Kiosks are available for use with touch screen, mouse or keyboard
- Full color digital information displays in the resource areas
- Use of ergonomic furniture in all resource areas and staff offices and meeting spaces

Efficient universal design allows us to serve more individuals while making few accommodations that can slow the delivery of services.

- C. Describe how the LWDB facilitates access to services provided through the local delivery system, including remote areas, using technology and other means (WIOA §108(b)(6)(B)).

CSCLM endeavors to offer the majority of services available in a brick and mortar career center in a virtual or electronic format. Our Career Success Plan as well as a full line of narrated training webinars are available through our website. Customers interested in training may also complete the online universal application and can submit their interest for tuition assistance to a CSCLM staff member for review. This digital portal allows a customer to access any service available in the center with the exception of one-on-one, personalized service. Remote one-on-one services may be scheduled with CSCLM staff using video chat for those customers that are unable to visit a CareerSource CLM office.

Additionally, CSCLM has partnered with numerous community agencies to bring workforce services to rural areas where service access is limited. Through the use of our two Mobile Units we are able to bring a full line of services to areas where they would traditionally be unavailable. Our partnership with libraries, food banks, DCF Access points and community action agencies allows customers to access workforce services in a single location.

With the implementation of the Workforce Innovation and Opportunity Act (WIOA) CSCLM has been proactive in increasing our outreach and assistance efforts towards individuals with disabilities. We are currently partnering with the Department of Vocational Rehabilitation and the Ticket to Work, Career Counseling, Information and Referral (CCIR) and Pre-Employment youth program to provide enhanced services to individuals with disabilities that are looking to enter the workforce. We also provide intensive Veteran services within each of our centers, provide outpost Veteran support throughout the community as well as maintain close relationships with local support agencies such as Salvation Army, Center for the Blind, Center for Independent Living, Marion County Homeless Council, Veterans Helping Veterans and Ocala Ritz, a homeless veteran transitional housing institution. One of the key components to creating successful outcomes is targeted and effective outreach.

As part of the business services strategy, CSCLM works with businesses and business groups (such as the local Economic Development Councils, Mid-Florida Regional Manufacturing Association, Ocala Human Resources Management Association) to:

- Learn about their unmet needs and challenges in the workplace;
- Identify areas in which the needs of businesses and candidates for employment can be matched or otherwise customized through negotiation;
- Explore the value of workplace flexibility and otherwise customizing employment in recruiting and retaining a diverse workforce and its usefulness as a tool to maximize productivity;

- Develop customized training resources for the specific skills needed by businesses; and
- Promote paid and unpaid work experiences (e.g., on-the-job training, internships, apprenticeships, etc.) for individuals with disabilities.

Our established relationships with local agencies provide an organic referral process. However, we realize that not all individuals that have disabilities engage the assistance of a social service agency. CSCLM also works closely with our local media partners in print and radio to broaden our umbrella of exposure to our local customer base. We currently run regular columns in the newspapers in our three county region and also host a 30 minute radio show every two weeks on WOCA The Source, 96.3 Talk Radio in Ocala to discuss services and initiatives. Adequate outreach and marketing are the cornerstone to ‘spreading the word’ about new opportunities and initiatives. Our dedicated Communications Manager uses a multi-faceted approach to reach individuals with disabilities. Social Media, print and broadcast methods are used in promoting services and encouraging individuals with disabilities to engage workforce to assist in their career development and planning. CSCLM is committed to providing services to all customers and to continually work to increase the awareness of businesses on the benefits of hiring people with disabilities.

Each of our Centers is fully accessible and set up with workstations that are specially equipped for individuals with disabilities; these include an ADA compliant computer and the Interpretive System for the hearing impaired, screen reading software, extra assistance filling out paperwork, language interpreters etc. Customers with disabilities are also given referrals (when applicable) to agencies such as Vocational Rehabilitation and Center for Independent Living where they may receive additional services.

Vocational Rehabilitation has an office in Ocala, which is conveniently located around the block from our comprehensive Career Center. The other two locations located close to our area are in Old Town and Gainesville. VR staff are provided itinerant services out of our career center in Chiefland. VR provides medical and psychological assessment, vocational evaluation and planning, career counseling and guidance, training and education, job-site assessment and accommodations, job placement, job coaching, OJT, supported employment, assistive technology and devices, time-limited medical and psychological treatment. They also provide assistance to individuals who have hearing impairment and in partnership with the Division of Blind Services work with the visually impaired.

The Center for Independent Living (CIL), which is a program of VR, has been a long-term and vital partner of CareerSource. CIL provides training to our staff in large group settings and in one-on-one settings regarding working effectively and compassionately with people with disabilities. CIL is also our contractor for interpretive services for both our internal staff needs as well as for our customers. CIL provides this quality service to all of our Centers.

Mental health and addiction are issues that become known through the course of working with our customers. Often these underlying problems make it impossible for an individual to succeed at their job search. Our customers rely on assistance from organizations that receive SAMHSA (Substance Abuse and Mental Health Services Administration) funding as both mental health and addiction services are typically financially unreachable elsewhere. Our two main providers are The Centers in Lecanto and Ocala and Meridian in Bronson and Trenton. There are a number of other help-lines and group therapy methods available along with sliding scale counselors in our tri-county area. The listing of these other services is also found on the local 211 network developed by United Way.

In addition to CSCLM Staff, the business services staff conduct outreach to businesses to develop employment opportunities for veterans; The Disabled Veterans Outreach Program (DVOP), which provides intensive case management services to veterans (especially disabled) to reduce barriers to employment; and, maximization of GI Bill resources to fund training and living expenses while veterans earn college credit and complete career ladder training programs.

CSCLM fully complies with the nondiscrimination and equal opportunity provisions of the following laws: Section 188 of the Workforce Innovation and Opportunity Act of 2014 (WIOA), which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIOA Title I financially assisted program or activity; Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color and national origin; Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities; The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs. The Board also assures that it complies with 29 CFR Part 37 and all other regulations implementing the laws listed above. This assurance applies to the operation of the WIOA Title I financially assisted program or activity, and to all agreements made to carry out a WIOA Title I financially assisted program or activity. The Board understands that the United States, the State of Florida and the DEO have the right to seek judicial enforcement of this assurance. The Board also assures that CSCLM appoints an Equal Opportunity Officer to ensure compliance with the regulatory requirements cited above.

To continue to build self-esteem and provide universal access of services to all customers, those with limited English skills are referred to our educational partners for assistance when needed. While professional language assistance is offered and available to these customers, a database of CSCLM bi-lingual staff who have volunteered to act as interpreters is maintained and available to fellow staff when

assisting customers. Application forms and informational items are being made available in Spanish which is our largest population of non-English speaking individuals. We also make use of Google Translate where necessary along with hiring interpretation as needed.

For ex-offenders, the permanent record of felony convictions can be a substantial barrier to employment. That barrier, coupled with the fact that many ex-offenders may have minimal education and vocational skills, results in a population that can be classified as “at risk” job applicants. Two programs used as valuable supportive tools to help market and promote ex-offender employment are the Work Opportunity Tax Credit (WOTC) and the Bonding Program. Workshops tailored to this population have been created and offered at CSCLM’s Centers.

In addition, CSCLM in partnership with the Department of Corrections conducts workshops at local prisons to inmates who are targeted for release. These workshops provide information on CSCLM general services, Employ Florida job search tips and suggestions on how and where to look for employment opportunities.

CSCLM is actively involved in the homeless coalitions in our area. Having mutual customers it behooves us to be actively involved in addressing the staggering numbers of homeless individuals in our region.

As a whole it is evident through the numerous partnerships and activity we maintain that not only are services offered in our brick and mortar locations, but spread throughout our service delivery area to insure that all residents and businesses in our area have the opportunity to experience the benefits of the One Stop system.

(3) Integration of Services: Describe how one-stop career centers implemented and transitioned to an integrated, technology-enabled intake and case management information system for programs carried out under WIOA and programs carried out by one-stop career center partners (WIOA §108(b)(21)).

As mentioned in the previous section, most of the services that are available within the traditional One Stop offices are also available digitally to those that wish to use them. Below is a list of the core services that are available online:

- Universal Intake and Release of Information
- Full Line of In-Depth and ‘Mini’ Workshops
- Tuition Assistance
- Job Readiness/Coaching via Skype
- Access to candidate forms on our website (programmatic)

These approaches allow us to deliver nearly all services that are offered in some fashion of electronic/digital format. While some customers do not find distance communication a viable form of assistance, many do and appreciate the flexibility and convenience.

CSCLM utilizes an electronic data management system (EDMS), ATLAS (Automated Tracking, Linking and Archiving Solution), which supports programs and

manages our participant records. VOS Greeter (Virtual One Stop) kiosk system is used to track Career Center traffic.

Customers entering the Career Centers or attending an offsite event sign in through the VOS Greeter kiosk system that is either on an actual kiosk or replicated on a tablet. Veterans and program participants are identified by this system and programmatic staff receive automated notifications. Customers are able to choose what category of assistance they need to access upon entering the building. Career Center traffic reports are shared with all of our CareerSource staff, Career Center Committee members and core partner programs. This service also identifies the program, service or partner program the customer has accessed. Quarterly Reports are analyzed to benchmark ongoing customer survey responses and data is utilized for ongoing continuous improvement. These reports are made available to CareerSource staff, One Stop Committee members, Board members and core partner programs. This service also tracks our demographic data. The ATLAS system is also our centralized database for programmatic records retention. Customers participating in WIOA, Wagner Peyser, Welfare Transition, TAA, SNAP E&T are able to scan documents using the ATLAS kiosk system. All programmatic forms are stored electronically in this paperless environment.

(4) Competitive Selection of OSO: Describe steps taken to ensure a competitive process for selection of the one-stop operator(s) (WIOA §121(d)(2)(A)).

1. Selection of one-stop operators: Meetings were convened with the Executive Committee in order to determine the definition of a One Stop Operator and if the Board wished to be part of the competitive process to be the Operator. It was determined by the Board that services would be procured and the Board would not be part of the bid process.

An Invitation to negotiate was released. One bid was received from Thomas P. Miller & Associates. A Sole Source procurement was approved by the Board. This decision was made on value of the proposed contract as well as past history and work done with the Thomas P. Miller & Associates in this workforce area. The step by step process of the procurement is as follows:

1. Formal Public Notice is made for a minimum of two days prior to ITN issuance in local newspapers
2. All known organizations recognized as being involved in the provision of the requested services are sent a notification of the ITN
3. The ITN package and complete response package is posted and available for review and download on our website
4. Expression of Interest by respondents must be received by CSCLM by the deadline listed in the ITN package
5. All respondent Expression of Interest packets are reviewed. A full determination is made about the demonstrated performance and ability of the organization(s). Capacity to perform successfully under the terms and

- conditions of the proposed program prior to approval being given to proceed with responding to the ITN
6. All respondents are notified of their qualification status after review and are advised if they should proceed with the ITN process
 7. Qualified respondents are required to submit their formal ITN package by the date listed on the ITN release
 8. CSCLM operations staff review all responses and score each organization on a standardized scoring matrix
 9. Staff recommendations for selection are made to the Executive Committee for review. The Executive Committee makes the final selection from the scored respondents
 10. The Executive Committee, at its discretion, may request respondents to present their proposals to the committee for review.
 11. The final selection is reviewed by the Board of Directors. Final selection is at the discretion of the Board of Directors

2. Appeal Process: The following appeal process would be used if needed: Any organization that submits a response to the CSCLM's competitive process receives fair and unbiased consideration. In accordance with CSCLM's policy, respondents who are denied funding have the right to appeal. The following steps must be taken for organizations to appeal funding decisions: From the date of notification, any bidder has 72 hours (three business days) in which to file a written appeal/protest with the CEO. At the scheduled meeting of the CareerSource Citrus Levy Marion Board in which final selection of Service Provider(s) is/are to be made (date, time and location of meeting is included in the RFP Package), the board will hear any Appeal(s)/Protest(s). The decision on selecting a One Stop Operator is also approved by the consortium, because of this an appeal may also be made to the three member Consortium; These decisions will be considered final, however, any responder has the right to appeal to DEO if they so desire.

- (5) System Improvement:** Describe additional criteria or higher levels of service than required to respond to education/training needs, labor market, economic, and demographic conditions and trends in the local area (WIOA §108(b)(6)(A)).

CareerSource CLM has been dedicated to continuous improvement of our system to better the services provided not only to our business customers, but to job seeking candidates, as well.

The first step taken toward reviewing service levels and restructuring future service provision began with our implementation of the Net Promoter System (NPS) in 2015. NPS is an automated survey software package that allows our Director of Continuous Improvement to target customer service surveys to specific groups of job candidates that utilize CareerSource CLM services. These targeted groups give real-time feedback based on specific touchpoints that are received as they navigate our system and services allowing for senior management to identify strong areas of service and any areas that may require immediate attention. Several touchpoints that are monitored on a monthly basis include (but not all inclusive):

- Initial use of resource room services
- 6 months after assistance from CareerSource CLM staff
- WIOA training enrollment
- WIOA training outcome and placement
- Veteran Services
- WTP/SNAP services
- Business Services job order processing

Our survey results continue to trend much higher than national averages for other service-based industries. This information drives flexible and fluid service provision to meet the demands of our labor force. Additionally, all negative feedback is handled in a closed-loop fashion by center management. All negatively responding candidates and businesses are contacted to discuss their feedback and to garner input on what improvements can be made to change their opinion.

Aside from customer feedback, the operations unit is focused on identifying and acquiring additional resources to strengthen local services. A focus is placed on identifying competitive grants that align with local sector and service initiatives. The team plays the primary role in creating proposals that enhance our existing services and meet the needs of current labor market trends.

Since 2016 Workforces Services plan was published the team has been successful in being awarded ten competitive grants:

Homeless Veterans Reintegration Program

Serves: 70 Adults and Dislocated Workers

Budget: \$189,070

Duration: July 1, 2017 to June 30, 2018

Purpose: To provide intensive employment and training services to homeless veterans in Marion county. This program includes traditional classroom education and work-based learning opportunities. This program was a partnership between Veterans Helping Veterans, Veterans Village, and Volunteers of America.

YouthBuild Phoenix Rising 2017

Serves: 48 Out of School/At Risk youth

Will result in four (4) homes built for low income families in Marion County

Budget: \$806,096.00

Duration: September 1, 2017 – December 31, 2019

Purpose: Training young adults in construction skills through classroom and worksite training through construction of homes in partnership with Habitat for Humanity, City of Ocala, Marion County, Marion County Sheriff's Office and the College of Central Florida. Participants will also earn a high school diploma during the program through Penn Foster.

YouthBuild Phoenix Rising 2019

Serves: 48 Out of School/At Risk youth

Will result in four (4) homes built for low income families in Marion County

Budget: \$740,737

Duration: January 1, 2020 – March 31, 2023

Purpose: Training young adults in construction skills through classroom and worksite training through construction of homes in partnership with Habitat for Humanity, City of Ocala, Marion County, Marion County Sheriff's Office and the College of Central Florida. Participants will also earn a high school diploma during the program through Penn Foster. Currently planning the first classes to begin in Spring of 2020.

Bridge to Skilled Trades

Serves 120 Youth, Adults, Dislocated Workers

Budget \$1,086,884

Duration: December 1, 2017 – June 30, 2020

Purpose: Expand training and talent pool resources in commercial truck driving and construction to meet current labor market demands.

Sector Initiative Grant

Serves: 30 Youth, Adults, Dislocated Workers

Budget \$249,958

Duration: December 1, 2018 – June 30, 2020

Purpose: Continuation of training conducted in the Bridge to Skills Trades grant. Specifically, a continuation in commercial truck driving.

FDOC Grant

Serves: Up to 55 incarcerated individuals

Budget: \$70,966

Duration: Phase 1 (July – December 2019) and Phase 2 (January – June 2020)

Purpose: CSCLM in partnership with the Department of Corrections will develop and implement a comprehensive employability and technical training program for incarcerated individuals prior to release from Lowell Correctional Institution / Lowell Annex, a state prison in Marion County serving adult females. Staff will conduct workshops which will provide information on CSCLM general services, Employ Florida job search tips and suggestions on how and where to look for employment opportunities.

Retail and Hospitality Grant

Serves: 96 Youth, Adults, Dislocated Workers

Budget : \$99,994

Duration: July 1, 2019 – June 30, 2020

Purpose: Conducted in partnership with the Ocala/Marion County Chamber and Economic Partnership (this area's economic development entity), Marion County Public Schools, and the Hotel Development and Management Group. This grant provides for the development of Retail and Hospitality Academies focusing on soft skills development within the service industries. Participants receive national recognized soft skills credentials (Retail Academy) and Guest Service Gold credentials from the American Hotel and Lodging Educational Institute.

Apprenticeship I Marion Grant

Serves: 20 Apprentices

Budget: \$94,220

Duration: February 1, 2019 – August 31, 2020

Purpose: CareerSource Citrus Levy Marion is implementing an Apprenticeship Expansion project in partnership with local Education, Economic Development and Industry representatives to enhance the existing Trades Core program at Marion Technical College in Ocala, FL. The Electrical Apprenticeship is the only specialty currently available, with a Masonry program scheduled to launch in 2019, followed by the Construction Carpentry program in Spring of 2020.

Apprenticeship II Citrus Grant

Serves: 15

Budget \$52,500

Duration: February 1, 2019 – August 31, 2020

Purpose: The development and implementation of a plumber's assistant apprenticeship program at Withlacoochee Technical College.

Apprenticeship III Marion Grant

Serves: 30

Budget \$149,748

Duration: January 1, 2020 – June 30, 2021

Purpose: The development and implementation of a construction apprenticeship program with Marion Technical Institute in Ocala. This grant also provides staffing funds for CSCLM to hire an apprenticeship coordinator that will assist the local schools with the documentation requirements for all apprenticeship programs.

DESCRIPTION OF PROGRAM SERVICES

- (1) System Description:** Describe the local workforce development system. Identify programs included in the system and how the local board works with each entity to carry out core programs and other workforce development programs supporting alignment in provision of services. Identify programs of study authorized under [The Strengthening Career and Technical Education for the 21st Century Act \(Perkins V\)](#) (20 U.S.C. 2301 et seq.), that support the strategy identified in the Florida Unified Plan under WIOA section 102(b)(1)(E) (WIOA §108(b)(2)).

The CSCLM local workforce system is geographically comprised of Citrus, Levy and Marion counties. This region is a diverse region, which includes very rural areas, small communities, and metro areas. This area includes an active commuter pattern especially notable with patterns moving into and out of neighboring areas to the north and south. I-75 is a primary driver for both commuting and for the distribution path and location for manufacturing. For this reason, a strong partnership has been forged with region's 6, 7, and 9. These four areas work together on talent supply

and training development to meet the needs of their businesses and to encourage growth of new employment opportunities along the major distribution paths in Florida.

CSCLM is publicly funded through varying streams of federal funds. Most of the funding is first received at the State level and then distributed to our area based on federal allocation methodologies. Some of the funding is received directly by CSCLM from other funding sources (ie. Department of Labor) for special grant activities that support our workforce system. CSCLM has developed strong partnerships throughout our community which will be sustained and strengthened under the WIOA.

Our workforce development system brings together a menu of services that can be accessed to fill the needs of our customers. These services are provided in three major ways as a foundation for our system. (1) Those that are provided within our physical career center locations, (2) those services that can be accessed through electronic means and supported by trained center staff, and (3) those services that are provided at affiliate sites.

We have four Career Centers in our area, with one center designated as a comprehensive service center. Two of the other centers currently provide the majority of the required programs with easy access to all programs, and the final center provides services to professional candidate and businesses seeking highly trained individuals.

- Marion County: Our Full Service Career Center is located at 2703, NE 14th Street, in Ocala
- Citrus County: Our Career Center is located at 683 S. Adolph Point, in Lecanto
- Levy County: Our Career Center is located at 2175 NW 11th Drive, in Chiefland
- Area wide: Our Professional Career Center is located at 3003 SW College Road in Ocala

We also have two mobile resource units (MRU) that we use to serve our outlying rural areas to increase the accessibility to our services and programs. These units have a pre-determined schedule at partner sites that is published on our website, our offices, and at partner offices so that customers know when and where to expect the mobile unit.

Currently, the majority of all required core programs are offered within all of our centers. These programs include:

- Wagner-Peyser (WP) Labor Exchange services are provided by merit staff and supervised by the local area. **Provided in all centers and MRUs**
- Veterans Employment and Training Services (VETS) program to include both the Disabled Veterans Outreach Program (DVOP) and the Local Veterans Employment Representatives (LVER), provided by State merit staff under the

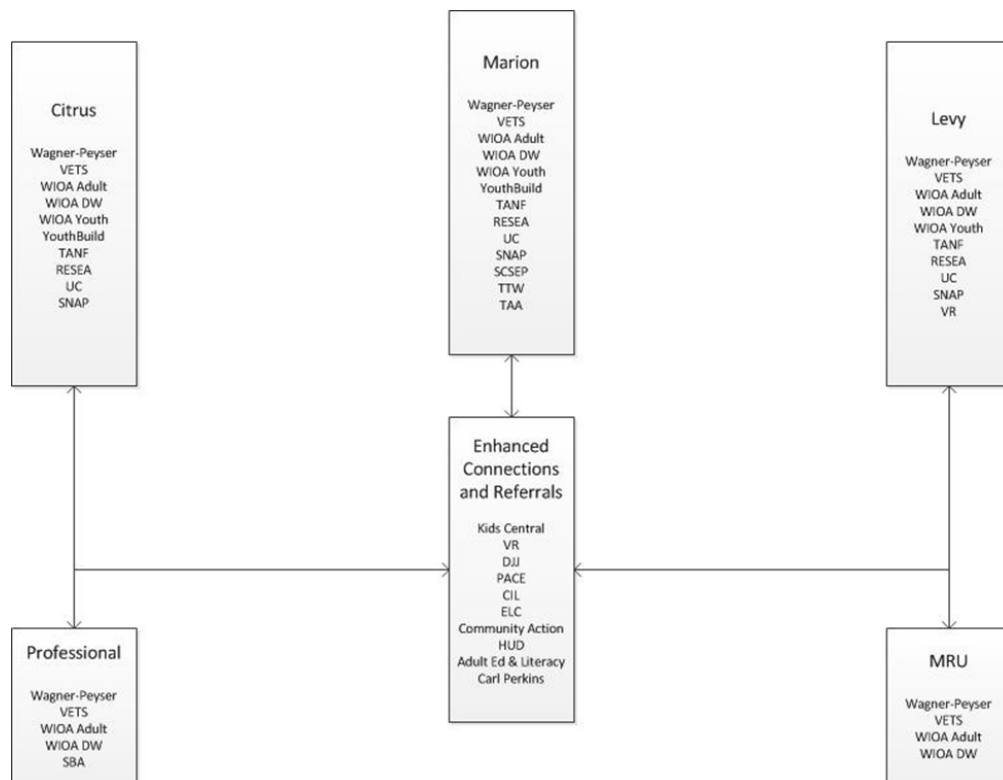
- supervision of the local area. **Provided in 3 Career Centers with trained staff assisting in all others**
- WIOA Adult and Dislocated Worker Self-services, Career Services, and Training Services, provided through direct services. **Provided in all centers and MRUs**
 - WIOA Youth services provided through contract with Eckerd Connects. **Provided in 3 Career Centers**
 - Trade Adjustment Assistance (TAA) is provided by merit staff and supervised by the local area. **Stationed in Marion County Career Center and available in all centers as needed.**
 - Temporary Assistance for Needy Families (TANF) is provided through direct services. **Provided in 3 Career Centers**
 - Reemployment Services and Eligibility Assessment Program (RESEA), provided through direct services. **Provided in 1 Comprehensive Career Center**
 - Re-employment Compensation (UC) information and navigation assistance, provided through direct services. **Provided in 3 Career Centers and 2 mobile units**
 - Supplemental Nutrition Act Program (SNAP), provided through direct services. **Provided in 3 Career Centers.**

Core programs provided within the system through memorandum of understanding (MOU) include:

- Vocational Rehabilitation (VR), services provided through MOU being negotiated at the State level with Department of Education. Local level of services and integration is being discussed and include, **Itinerant Services, direct linkages, plus contract to serve transitioning youth and adult on the job training.**
- Senior Community Service Employment Program (SCSEP) is provided through MOU negotiated locally. **On site in one Career Center with direct linkages for other centers.**
- Adult Education and Literacy Activities is provided through Withlacoochee Technical, Marion Technical and local Colleges. **Direct linkages and through referral.**
- Carl D. Perkins Career and Technical Education Act through Withlacoochee Technical, Marion Technical and local Colleges, **supporting training needs as determined by skills gap in community.**
- Community Action Agencies training and employment services, MOU negotiated locally. **Available in our Comprehensive Center and in Coordination of services & Integrated Referrals in all other centers.**
- Housing Authorities, MOU negotiated at the local level. **Coordination of Services & integrated referrals.**
- Department of Juvenile Justice and corrections services through MOU negotiated locally. **Integrating services for mutual benefit and referrals upon release**

Other employment and training programs within the system include:

- Ticket-to-Work services are provided throughout the area in contract with the Social Security Administration. **Stationed in Marion County Career Center and available in all centers as needed.**
- Small Business Administration services are provided in partnership with our business services. **Located in same building as Professional Center with on-going linkage.**
- Kids Central services for Foster Youth. **Referrals between youth serving agencies**
- Early Learning Coalitions. **Provide refined referrals**
- Center for Independent Living, provide services as needed to individuals with disabilities. **Referrals, training, and accessibility.**
- PACE Center for Girls. **Referrals between youth serving agencies.**



(2) Sub-grants and Contracts: Describe the competitive process used to award sub-grants and contracts in the local area for WIOA-funded activities (WIOA §108(b)(16)).

Currently, CSCLM provides direct management and acts as the service provider for the One Stop Centers (including the Adult and Dislocated Worker programs) through an approved waiver granted by CareerSource Florida. However, Youth services are contracted and the text below illustrates the process used to procure that provider.

All service providers are procured per our formal Procurement Policy and Procedures that were developed in compliance with Federal and State laws. All service provider procurements are initiated through an Invitation To Negotiate (ITN). Section 287.057 of the Florida Statutes provides that in certain circumstances where an agency determines "...that an invitation to bid or an RFP (request for proposals) will not result in the best value..." it can opt to use an Invitation To Negotiate. This permits us to focus not only on overall cost of the program, but primarily the quality of service to be provided taking into account historical performance of the organization. All eligible response packages received during the procurement process are retained in hardcopy form in the CSCLM administrative offices and are available for review during routine local, State and Federal monitoring sessions. The following steps illustrate the process:

1. Formal Public Notice is made for a minimum of two days prior to ITN issuance in local newspapers
2. All known organizations recognized as being involved in the provision of the requested services are sent a notification of the ITN
3. The ITN package and complete response package is posted and available for review and download on our website
4. Expression of Interest by respondents must be received by CSCLM by the deadline listed in the ITN package
5. All respondent Expression of Interest packets are reviewed. A full determination is made about the demonstrated performance and ability of the organization(s). Capacity to perform successfully under the terms and conditions of the proposed program prior to approval being given to proceed with responding to the ITN
6. All respondents are notified of their qualification status after review and are advised if they should proceed with the ITN process
7. Qualified respondents are required to submit their formal ITN package by the date listed on the ITN release
8. CSCLM operations staff review all responses and score each organization on a standardized scoring matrix
9. Staff recommendations for selection are made to the Executive Committee for review. The Executive Committee makes the final selection from the scored respondents
10. The Executive Committee, at its discretion, may request respondents to present their proposals to the committee for review.
11. The final selection is reviewed by the Board of Directors. Final selection is at the discretion of the Board of Directors

- (3) Expanding Access to Employment:** Describe how the local board, working with entities carrying out core programs, expanded access to employment, training, education and supportive services for eligible individuals, particularly eligible individuals with barriers to employment. This includes how the local board facilitates developing career pathways and co-enrollment, as appropriate, in core programs, and improves access to activities leading

to recognized postsecondary credentials (including portable and stackable industry-recognized certificates or certifications) (WIOA §108(b)(3)).

Our approach to addressing the training needs of our community is a two-fold approach – candidate and business.

CSCLM is dedicated to meeting the up-skilling needs of area businesses through traditional classroom training as well as several work-based initiatives to ‘grow our own’ in the targeted industries. Through close partnership with area educators, custom designed classroom training can be created for local candidates as well as employees of existing businesses within the region. Area educators include The College of Central Florida, Marion Technical College, Marion Technical Institute and Withlacoochee Technical College as well as several private training institutions that specialize in technical occupations. In addition to our top rated education partners, CSCLM also hosts administrative office space for the Executive Director of the Mid-Florida Regional Manufacturer’s Association (MRMA). MRMA is a member of the Manufacturer’s Association of Florida and represents manufacturers and their interests throughout Citrus, Levy, Marion, Alachua, and Sumter Counties. Our co-location and partnership with MRMA has helped us understand the needs and training requirements of local businesses in the manufacturing and logistics industries and has created a direct conduit for information exchange between workforce development and the key stakeholders within these businesses.

- Sectorial training in targeted sectors to increase training capacity to provide the skilled workers businesses need, including through work-based training activities.
- Basic skills/remediation/prerequisite education will also be provided to those participants who do not meet training entry requirements.
- Provision of quality career pathways (ladders/lattices) with well-connected and transparent education, multiple entry points and multiple exit points.
- Focus on demand occupations that lead to industry-recognized certificates or associate degrees and which can lead participants from entry-level jobs to more specialized, higher wage jobs.
- Job coaching and job matching, to include assessment of knowledge, skills and abilities (KSAs) in relation to openings in the targeted sectors, sequenced services, short-term and work-based training structured around an employability plan, longer-term training to lead to higher skills attainment, business engagement, supportive services, counseling, and follow-up.
- Creation of subsidized employment opportunities that will lead to unsubsidized employment.
- On-the-Job Training (OJT) opportunities developed in conjunction with industry partners will be offered meeting OJT requirements: the length of training will not exceed six months and will be based on identified skills gaps.
- Transitional Job Opportunities may be made available to those candidates with barriers to employment that are chronically unemployed or have an inconsistent work history and will be combined with comprehensive employment and supportive services.

- Incumbent Worker Training will be available to assist with costs associated with skills upgrade training for current employees of the company. Businesses will meet the matching Federal Share specified in WIOA.
- Registered Apprenticeship and pre-apprenticeship opportunities in electrical, masonry and carpentry.
- Customized Training will be offered on behalf of a business or group of businesses from targeted industries, which make a commitment to hire successful completers or retain current employees.
- Internships/work experiences that are linked to careers in the targeted sectors may be used for those participants whose KSAs are close to matching the needs of area businesses, but who require a helping hand to update those KSAs and re-engage in the workforce in order to become more competitive during the job search process. Contextualized learning will be emphasized, as well as concrete strategies for placement in unsubsidized employment.

(4) Key Industry Sectors: Identify how the LWDB aligns resources that support and meet training and employment needs of key industry sectors in the local area. Describe strategic or other policies that align training initiatives and Individual Training Accounts (ITAs) to sector strategies and demand occupations (WIOA §134(c)(1)(A)(v)).

Sector training in Manufacturing/Distribution/Logistics, Healthcare, Information Technology, Construction and Hospitality will be directed by targeted businesses through traditional classroom and work-based training initiatives. Awareness of business needs are identified through our strong partnerships with area educators, industry groups and the businesses themselves. This is done primarily through industry specialized staff in our Business Services unit. Efforts are coordinated at the local level to ensure proper partnerships are formed between training providers, private industry, labor unions, community organizations, workforce development organizations and other key stakeholders to better meet local needs. Our business-led board membership remains at the helm of reviewing all business practices and providing feedback based on their individual sector experience. It is our practice and intent to continue seeking out new grant opportunities that are in alignment with these demand sectors and occupations, allowing us to better serve our customers with increased resources.

Training enrollment options in these sectors allow for multiple points of entry, with training durations ranging from one month to two years. We are fortunate to have well established partnerships with two technical and vocational training institutions in our area. Marion Technical College (MTC) and Withlacoochee Technical College (WTC) have a history of helping us create or reform current curriculums to meet the needs of local businesses in key sectors. Our administrative offices are located on the campus of the College of Central Florida, giving us a direct connection to discuss educational needs at certificate and degree levels as market trends shift and affect local demand sector needs. Our comprehensive work-based training programs can supplement classroom training when specific business needs cannot be met through current curriculum.

Training programs are directly linked to occupations that support the local workforce and economy. This allows us to continue to train talent as needed to match the needs of local businesses. Training providers are reviewed every two years for adequate performance, programmatic and institutional information.

- (5) Industry Partnerships:** Describe how the LWDB identifies and collaborates with existing key industry partners in the local area. Describe how the LWDB coordinates and invests in partnership infrastructure where key industry partnerships are not yet developed (WIOA §134(c)(1)(A)(iv)). The local area must describe how the following elements are incorporated into its local strategy and operational sector strategy policy:

CareerSource CLM takes a proactive and multi-faceted approach to maintaining strong relationships in targeted sectors. This is done through continual participation and communication with sector partners.

Our Business Services unit is comprised of Industry Targeted Staff that focus on service provision to businesses in our targeted sectors:

- Manufacturing, Transportation, Logistics
- Healthcare
- Professional and IT
- Construction
- Hospitality

Each staff member is an expert in their related industry and maintains a community presence amongst local businesses. This is done through providing presentations on services available through CareerSource CLM at trade expos, local industry associations, chamber events and other business and industry events. Staff also monitor daily activity on each business's recruiting efforts through the Employ Florida system and strive to source talent when needed to meet the business's needs. Alternative solutions are offered when talent shortages arise, these include On the Job Training, Customized Training and Paid Internship and Work Experience opportunities to assist in the location of fresh talent while offsetting the extraordinary costs of hiring new employees that are not a perfect match to the required skills.

Partnerships are critical to the development of new relationships. CareerSource CLM actively works with the local chambers and economic development partners to provide 'one-stop' solutions to new businesses and emerging industries. Having all pertinent partners at the table during discussions with new businesses or industry representatives provides a holistic approach to business solutions. This approach eliminates the need for multiple meetings and mixed dialog. A consistent message is provided and solutions can be offered that meet the needs in a single meeting while maximizing locally available resources.

- A. Describe how selected industries or sectors are selected based on, and driven by, high-quality data (cite data source used);

This is a primary function of our Board and is facilitated by staff through data obtained from Jobs EQ, Supply and Demand, and Florida Labor Market Statistics. However, decisions are not made solely on statistics as often times singular events can skew data and we look at long term growth and sustainability. We also engage

our local businesses, partner agencies, educational partners, and private sector board members to assist in identifying growing and emerging industries/occupations.

B. Describe how sector strategies are founded on a shared/regional vision;

Our previous strategic planning sessions in 2015 led to the goals and objectives in the 2016 workforce plan (and subsequent modification). This strategic plan remains in effect. This was a culmination of several planning sessions involving private industry, community partners, and cross regional representation. The goal was to provide equal input and cross functionality to meet the needs of the most partnering agencies at once.

C. Describe how the local area ensures that the sector strategies are driven by industry;

All decisions regarding sector strategies are vetted by our private sector/industry led committees and board (including economic development representation). Data and recommendations are presented to the committees and board by CareerSource CLM staff and all final decisions are board driven.

D. Describe how the local area ensures that sector strategies lead to strategic alignment of service delivery systems;

After our targeted industries were established our service delivery model was altered to ballast the efforts. Our Business Services unit was re-aligned to focus on the sectors and provide enhanced talent development and acquisition. Local policy was changed to dictate the focus of our formula tuition and work-based training funds to be focused on the most in-demand occupations within the targeted sectors. Additionally, our Area Targeted Occupation List was reworked and discussions were conducted with partnering educational facilities to support the targeted sector initiatives.

E. Describe how the local area transforms services delivered to job seekers/workers and employers through sector strategies: and

Refer to section D above.

F. Describe how the local area measures, improves and sustains sector strategies.

While decisions on which industries and occupations take into account data and testimony from private industry, we rely on solid data to quantify the decisions made. Input and opinions are considered, but we strive to ensure that the recommendations were not simply anecdotal. All of our tuition based and work based training programs are reviewed annually for positive outcomes. Just as we require data from training providers to substantiate why a program should be considered to be offered in this area, we also hold placement and retention outcomes after training completion to the same standard. Should performance not meet local expectations then the program would be reviewed and either placed in

'probation' status or removed from our Area Targeted Occupation List at the Board's discretion.

- (6) In-demand Training:** Describe how the local board ensures training provided is linked to in-demand industry sectors or occupations in the local area, or in another area to which a participant is willing to relocate (WIOA §134(c)(G)(iii)).

Prior to full enactment of the WIOA, CSCLM began the process of developing a strategic plan that would be implemented prior to July 1, 2015. A major component of that plan was to determine the industry sectors that are most prominent or emerging in our area. Planning sessions included third party consultants, educators, community agencies and economic development entities. Through the process it was determined that our targeted industries are: manufacturing, health care, information technology and transportation, distribution and logistics. Most recently in December of 2017 our Board added Construction, and in December 2019 Hospitality to our targeted sectors. Construction was fueled in part by a series of recent hurricanes in the area that created a skill shortage. A general rebound in our economy that had already garnered the attention of the Board has also driven tourism and a need for improved soft skills in the Hospitality sector. The general economic climate is providing for new construction and enhanced travel and tourism throughout our state.

CSCLM has a detailed policy and procedure for the local selection of training providers and their associated programs based on local MIS data and input from area stakeholders. Training providers and targeted occupations are reviewed every two years to determine continued performance and need. Ongoing input from partnering agencies, educators, economic development, and business leaders allows for our Area Targeted Occupation List (ATOL) to be a living document that can change with the current economy and local business needs.

Occasions arise when individuals may wish to attend training out of our area for targeted occupations. This often occurs when a trainee resides near another county/workforce area with a closer training institution. When this happens we refer to the other area's eligible training provider list. Approval for attendance at an educator not on our local list may be given by senior management if the training provider has been vetted and approved by the other workforce area. A denial to the request may be given in instances where the provider has not been approved by the other area.

- (7) Employer Engagement:** Describe strategies and services used in the local area to:

- A. Facilitate engagement of employers, including small employers and employers in in-demand industry sectors and occupations, in workforce development programs;

CSCLM uses information from the Salesforce software platform as a customer relationship management (CRM) tool to allow best-in-class management of its interactions with stakeholders/businesses. This CRM system allows us to work

together and enhance collaborative opportunities from a business services perspective. Core program partners are engaged in conversations to explore using this system in their business outreach activities to record and share interactions and activities with businesses and prevent duplication while expanding our business engagement across the area.

Business services staff members are targeted to the sector industries of manufacturing, health care, information technology, transportation, distribution and logistics, construction and hospitality. Staff maintain open communication with area businesses to keep abreast of latest industry needs and emerging occupations and technologies.

Outreach events such as job fairs and Youth Career Expos are held across all three counties in the service area. Many of these events are offered in partnership with local industry councils, chamber and economic partners and schoolboard employees, ensuring a robust approach to serving employers through targeted services focused on experiential learning for new and existing staff as needed.

- B. Support a local workforce development system that meets the needs of businesses in the local area;

CSCLM continues to work closely with all economic development partners, and educational providers to determine needs in the community. CSCLM also works closely with our educational providers and industry associations to coordinate training needs to support special customized programs. During the past several years, CSCLM has worked with the College of Central FL and MRMA to launch several short term training programs such as Commercial Driving, Blueprint Reading, CNC Certification, AutoCAD, Warehouse/Forklift, retails and hospitality soft skills, and Construction Core programs based on needs businesses have expressed. Based on completion of these programs, CSCLM connects graduates with businesses utilizing our Internship program as well as OJT options. In Levy County, CSCLM participates on an advisory committee with the College of Central Florida for their Timber Harvesting program that began in the fall of 2016. Several businesses in the timber industry expressed a concern for the lack of skilled applicants for a growing industry. CSCLM continues to support that program through recruitment, assessment and tuition assistance for short-term training.

- C. Better coordinate workforce development programs and economic development; and,

CSCLM meets regularly with all 3 of our economic development partners to keep informed as well as share information on expanding business, future training needs and/or potential hiring issues with businesses. Staff from our Business Services unit are partnered with employees from the various agency for consistent communication and sharing of information. In Marion County, the Chamber and Economic Partnership (CEP) staff regularly calls CSCLM to advise of issues and/or problems businesses are having with finding qualified candidates. CSCLM staff coordinates with partner agency staff and the businesses to offer services and options such as OJT or Internships and/or hiring events to help support their needs. In addition,

CSCLM attends meetings and/or conference calls set up by the EDCs with perspective businesses to learn of our workforce services and programs to support a new business in the community.

CSCLM has developed several strategies targeted at improving business engagement. As part of our business outreach strategy, CSCLM contracts with each economic development partner to provide information and to coordinate services and training with existing area businesses and their business attraction programs. In addition, CSCLM works with SCORE and our SBDC staff to make our services known and available to small businesses and start-up firms. Through the CEP in Marion County we also work with the Power Plant; a small yet growing business incubator.

In addition, our relationships with the Ocala Human Resource Managers Association (OHRMA), and job listing relationships with staffing firms keep our team abreast of the changing needs of businesses throughout our area.

Our Business Services team works with each EDC partner and each partner is a member of our Business and Economic Development Committee, where they provide updates on economic development at each meeting and can provide input on business strategies conducted through CSCLM's Business Services team.

- D. Strengthen linkages between the one-stop delivery system and unemployment insurance programs (WIOA §134(c)).

Staff in our resource rooms guide candidates on the process of how to apply online. While at the office, staff offer to the applicant our general services by encouraging them to participate in our Career Success Plan program, advise of our various workshops, our training programs, hiring events and other service to reengage the applicant towards employment.

In addition, CSCLM participates in the RESEA program, which requires a select pool of reemployment applicants that are likely to exhaust their benefits due to limited work skills, education and/or prior experience. The program requires the individual to meet with staff to develop an Individual Employment Plan that will engage them into a more effective and productive job search. Services provided to the individual will range from a formal assessment, identifying barriers, updating and/or support with resume development and providing labor market information.

CSCLM works closely with businesses when we become aware of pending layoffs and/or reduction of staff. CSCLM will meet with the business, advise of our general services and customize services to meet the needs of impacted employees. Customized services can include: on site workshops, resume development, how to apply for reemployment benefits and requirements, advice on training opportunities that they may be eligible for and employment services such as OJT and/or Internships, and/or other employment opportunities.

- (8) **Priority of Service:** Describe local policies and procedures to prioritize services for veterans, recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient for individualized career and training services in the adult program.

CSCLM's local policy is in alignment with requirements outlined in WIOA. Priority of Service is applied to all Adults applying for services. The specifics of our approach are located in our local operating policy: ***OPS-26 WIOA Eligibility/Services Information:***

WIOA ADULTS

Under WIOA, the 'limited funding for priority' provision is removed. It is implied that all WIOA participants that are funded under ADULT formula funding will be served through consideration of Priority of Service. Priority of Service is given to those individuals that exhibit 'multiple barriers' or special priority categories specified below. Funds allocated for Dislocated Workers are not subject to this requirement. Priority is given first to these individuals:

1. Meeting WIOA eligibility under Title I for the Adult Program as defined in the WIOA section 3(2) as a person of or over the age of 18 years old.
2. A resident residing within the geographic borders of Citrus, Levy or Marion counties or a resident of a neighboring county that is seeking employment in Citrus, Levy or Marion County; **and**
3. Is a low income individual as defined in the WIOA Section 3(36)(A) or meets the local definition of low income as specified in WIOA and CareerSource CLM policy.

Priority is given when additional barriers are present

Exhibiting at least one of the following characteristics (Priority of Service):

- Military Veteran
- Belonging to a group designated by the Governor as a special needs group (individuals with disabilities, over 55 years of age)
- Recipients of public assistance
- Receives, or in the past six (6) months has received, or is a member of a family that is receiving or in the Past six (6) months has received, assistance through the supplemental nutrition assistance program, cash assistance through Temporary Assistance for Needy Families (TANF), or is eligible for supplemental security income or any other State or local income based public assistance.
- An individual who is basic skills deficient (For adults, the term "basic skills deficient" is defined in WIOA sec. 3(5)(B) and applies when an individual is unable to compute or solve problems, or read, write, or speak English, at a level necessary to function on the job, in the individual's family, or in society. Priority must be given regardless of funding levels.)
- Is a homeless individual

- Is an individual with a disability whose own income meets the income requirements of bullet number two (2) listed above, but who is a member of a family whose income does not meet this requirement.

(9) Training Services: Describe how training services are provided, including how contracts for training services are used, and how such contracts are coordinated with the use of ITAs (WIOA §134(c)(1)(A)(v)).

CSCLM offers training services that are necessary to fill the skill gaps within our communities. Priority will be given for occupations in our Targeted Sectors. The following methods will be used:

Individual Training Accounts

Individual Training Accounts (ITA) will be used to pay for tuition that is not covered by other funding sources such as PELL. These accounts will be issued to training institutions that have been approved for placement on our Area Targeted Occupation List in accordance with local and State policy.

On-the-Job Training

On-the-Job Training will be offered in an effort to place individuals into jobs within our targeted sectors. OJT will be provided under contract with the business who can be a public, non-profit, or private sector business. Occupational training will be developed based on a training plan that focuses on the skills that each trainee needs to be successful in the particular occupation. In some instances it is necessary to follow a completed ITA with a limited OJT to insure that all skills are gained by the trainee. Our reimbursement for OJT is at 50% of the wage rate. There are instances where a 75% reimbursement rate may be used if the OJT trainee is classified as a targeted demographic: veterans, individuals with disabilities, recipients of cash assistance, homeless, ex-offender.

Customized Training

Customized training will be used to enable the local area to develop training strategies with our education providers that can meet short term employment needs for new or expanding businesses. These training efforts are not typically offered through regular classroom training offered on the Area Targeted Occupation List, but are customized per business or group of businesses who need to fill current or projected vacancies. The businesses will pay at least 50% of the training costs and will commit to hire the individuals once training is complete.

Customized Training for Employed Workers

This training is delivered in much the same way as customized training through the use of an agreement with the business that defines the specific skills to be taught and certifications to be gained. The individual who is trained is already employed by the business but is in need of enhanced training and skills to meet the needs of the business. The focus will be on growing the skill base within our sector industries

and will assist an individual who is not yet self-sufficient to become a self-sufficient wage earner. Businesses will be required to contribute 50% of the training costs.

Incumbent Worker

Incumbent worker training is an effective strategy to use when assisting a business or their employee (of longer than 6 months) with becoming more competitive. This training is designed to meet the needs of a business or a group of businesses in order to retain a skilled workforce and to avert the need to lay off employees by providing training and certifications of new skills needed by the business. No more than 20% of the total Adult and DW funding will be set-aside each year to support incumbent worker training. Businesses will be required to pay the non-federal share of the training costs.

Transitional Jobs

Transitional jobs provide a limited time work experience for an individual who has barriers to employment due to chronic unemployment or inconsistent work history. These jobs help to establish a work history, demonstrate work success, and develop skills that lead to unsubsidized employment. No more than 10% of the Dislocated Worker and Adult funds may be used for transitional jobs. Because this training strategy assists those with barriers it is necessary that it is combined with comprehensive career services and support services. This program is different than an internship or regular work experience.

Internships/Work Experience

Internships are a structured learning experience that is developed within a workplace for a limited period of time. These may be paid or unpaid, but are used to enhance skills and speed up time to employment. This is a very effective strategy for career changes and for entrants into a new career following training.

- (10) Customer Choice Process:** Describe processes the local board uses to ensure customer choice in the selection of training programs, regardless of how the training services are to be provided (WIOA §108(b)(19)).

We strive to provide a wide range of training opportunities to our customers as defined in the WIOA. CSCLM drafts an updated Area Targeted Occupation List (ATOL) at the beginning of each program year and updates it periodically as needed throughout the year. This list is a culmination of in-depth data research and discussion with area educators, businesses and economic development entities to insure that our offerings are varied and in demand. This list is maintained on our website. Customers are encouraged to speak with a Career Coach as well as with their educator of choice to make the most informed decision possible. CSCLM staff do not recommend, nor endorse specific providers since all of our locally approved providers and programs have passed stringent performance requirements.

Locally, Individual Training Accounts (ITA) are used for students to access educational services from providers on our ATOL. Customers participating in On the

Job Training, Customized Training, Paid Work Experience or Paid Internship, and Apprenticeships are not subject to ATOL limitations, however, priority usage of funds is geared toward those businesses within our targeted sectors.

Occasions arise when individuals may wish to attend training out of our area for targeted occupations. This often occurs when a trainee resides near another county/workforce area with a closer training institution. When this happens we refer to the other area's eligible training provider list. Approval for attendance at an educator not on our local list may be given by senior management if the training provider has been vetted and approved by the other workforce area. A denial to the request may be given in instances where the provider has not been approved by the other area.

(11) Individual Training Accounts: Describe the process and criteria for issuing Individual Training Accounts (ITAs) (WIOA §108(b)(19)).

A. Describe any ITA limitations established by the board;

Individual Training Accounts (ITAs) shall be utilized to provide training services to WIOA and appropriate Welfare Transition customers. The ITA will be developed after consultation with the Career Coach. Limitations on ITAs exist regarding eligibility, coordination of funds, duration, total amount, support services, and needs based payments. ITA issuance is dependent on available funding and priority is given to those individuals that meet one or more criteria of our priority of service policy.

ELIGIBILITY

WIOA Section 134 (d) (4) (B) limits the use of WIOA funds for training services to instances when there is no or inadequate grant assistance from other sources available to pay for the costs.

PROGRAM CHOICE

20 CFR section 663.310 requires that, to receive training, an individual must select a program of service directly linked to occupations in demand in the area, based on performance information. A State and local generated list of eligible providers along with performance information shall be made available to customers through the One Stop System. Customers may select a program listed on the Area Targeted Occupation List mentioned above, and may select an appropriate training vendor from the CSCLM Approved Training Vendor Listing (*see CareerSource Citrus Levy Marion Policy OPS 34: CareerSource Citrus Levy Marion Approved Training Vendors*)

COORDINATION OF FUNDS

WIOA Section 134 (d) (4) (B) requires the coordination of training costs with funds available under other Federal programs. To avoid duplicate payment of costs when an individual is eligible for both WIOA and other assistance, including a Pell Grant,

20 CFR section 663.320(b) requires that program operators and training providers coordinate by entering into arrangements with the entities administering the alternate sources of funds, including eligible providers administering Pell grants. All sources of funds, excluding loans, shall be considered in determining a customer's overall need for WIOA funds. Participation in a training program funded under WIOA may not be conditioned on applying for or using a loan to help finance training costs.

A primary focus of our customer training and support funds shall be directed at High Skill/High Wage short duration training programs with the remaining customer funds focused on employed worker services. Part-time, employed students, who are traditionally not eligible for Federal Financial Aid, shall be given high consideration when applying for training services.

When the financial aid package together with the funds requested from the regional workforce development board are in excess of the required funds needed to meet the direct training and supportive service needs of the customer, CSCLM funds shall be limited to the amount needed to support the training after consideration of the financial aid package.

20 CFR section 663.320(c) permits a WIOA customer to enroll in a training program with WIOA funds while an application for Pell Grant funds is pending, but requires that the local workforce investment area be reimbursed for the amount of the Pell Grant used for training if the application is approved. Since Pell Grants are intended to provide for both tuition and other education-related costs, the Rule also clarifies that only the portion provided (with Pell funds) for tuition is subject to reimbursement.

It is important to note that the Pell Grant is not school-based; it is a portable grant for which preliminary eligibility can, and should, be determined before the customer enrolls in a particular school or training program. The application for determining eligibility and ultimately the amount of the grant, should be readily available at all career centers for assistance in the completion of these "gateway" financial aid applications.

DOCUMENTATION

It is mandatory that Career Coaches document fund coordination each academic year, using:

1. The customer's financial aid award letter;
2. a copy of the customer's training budget (referred to as the Cost of Attendance budget) developed by the Career Coach and customer using each training vendor's Cost of Attendance calculations as a point of reference;
3. Statements on the IEP that WIOA funds are awarded in coordination with other financial assistance.

ITAs will be limited in duration to a period equivalent to that necessary to attain a "two year" degree or certification. Exceptions exist for individuals that have a two year degree and are striving to attain a four year degree.

B. Describe any exceptions to the use of ITAs.

Exception to ITAs will include Apprenticeships, OJT, customized training, and employed worker training, paid internships and work experience, and contract classes when appropriate. Occasionally, CSCLM will contract with an education provider to conduct a class and allow enrollment up to a specific amount of individuals into the class. This is often done during the execution of competitive grants when the training provided needs to be offered quickly and when the educational provider must insure that the expense of developing and hosting the class does not exceed actual enrollment. These are the only type of contracts related to training authorized by CSCLM and are consistent to those contained in WIOA.

- (12) Microenterprise and Entrepreneurial Training:** Describe mechanisms currently in place or in consideration that provide microenterprise and entrepreneurial training. Describe mechanisms in place that support programs and co-enrollment, where appropriate, in core programs as described in WIOA section 134(a)(3)(A)(i) (WIOA §108(b)(5)).

The Florida Small Business Development Center (SBDC) of Ocala is co-located with CSCLM's administrative offices on the Ocala campus of the College of Central Florida. The Florida SBDC provides entrepreneurs with professional business consulting, management training, and vital information they need to grow and succeed in a complex and competitive global environment at no cost. The Ocala office is a full-service center, serving emerging and growing businesses in Alachua, Bradford, Citrus, Dixie, Gilchrist, Levy and Marion Counties. Our staff works regularly with the SBDC to form business solutions through combined efforts. In partnership with the College of Central Florida, SBDC, CSCLM, the Mid-Florida Regional Manufacturers Association and the Ocala Human Resource Management Association (ORHMA), small business training and workshops are offered regularly in all facets of entrepreneurial enterprise. This is a notable access point for individuals and programs are tailored to assist both individuals and small businesses in their talent development and training efforts.

- (13) Enhancing Apprenticeships:** Describe how the LWDB enhances the use of apprenticeships to support the local economy. Describe how the LWDB works with industry representatives and local businesses to develop registered apprenticeships, in collaboration with apprenticeship training representatives from the Florida Department of Economic Opportunity and other partners, including educational partners. Describe how job seekers are made aware of apprenticeship opportunities.

Our local area currently offers electrical and masonry apprenticeships through the Marion Technical College and is in the process of adding Carpentry. The College of Central Florida is adding a Hospitality program that will be offered beginning in the spring/summer of 2020. We ensure that opportunities to apply for these training positions are well advertised with our area and within our centers and are made available through public posting of our Area Targeted Occupation List.

We have been in dialogue with both the State office of apprenticeships and with the manufacturing industry to continue the development of new opportunities.

- (14) Other Program Initiatives:** Describe services provided that include implementing initiatives such as incumbent worker training programs, on-the-job training programs, customized training programs, work-based training, industry and sector strategies, career pathway initiatives, utilization of effective business intermediaries, and other initiatives supporting the board's vision and strategic goals described in Section III WIOA §134(c).

CSCLM is proud of the wide variety of training opportunities we provide. It is clear that the WIOA is moving workforce in the direction of more work-based and experiential training. Currently our offerings include Custom Business Training (Customized Training for Employed Workers), Customized Training, On the Job Training, Paid Work Experience and Paid Internship opportunities as well as traditional ITA.

We continue to focus on partnerships between private industry and education. The idea is to firmly link industry, education and workforce to provide a clear stream of communication of current and emerging needs within our targeted industries so that the educators may adapt their training programs to align with those needs.

Increased communications between CSCLM and the public school system has created a valuable talent stream from the K-12 system. The K-12 system's technical certification programs have been aligned to our industry sectors through the requirements of the Career and Professional Education (CAPE) Act. Likewise, the College of Central Florida and Marion Technical College have articulation agreements in place for students moving from technical programs in the K-12 system into career and technical or degreed programs promoting a seamless and unified approach of creating career pathways.

- (15) Service Provider Continuous Improvement:** Describe the local board's efforts to ensure the continuous improvement of eligible providers of services, including contracted services providers and providers on the eligible training provider list, so they meet the needs of local employers, workers and job seekers (WIOA §108(b)(6)(A)).

To ensure continuous improvement, CSCLM regularly evaluates the performance level of all contracted service providers and our internally provided services. We use a four pronged approach to this oversight.

- First, regularly scheduled monitoring of provider and internal performance and compliance is conducted by our Quality Assurance department. Immediate prescriptive feedback is provided if/when deficiencies or other general concerns are noted. We are also beginning to conduct third-party monitoring of all of our programs and services to ensure full compliance with local, state and federal regulations and policies.
- Second, all contracted provider staff attend educational "All Staff" meetings several times a year with their CSCLM colleagues. Best practices regarding

various continuous improvement initiatives are trained on and reviewed during these meetings.

- Providers of programs listed on our Area Targeted Occupation List must show strict performance levels for the programs they wish to have included on our list and must undergo review a minimum of every two years.
- Finally, CSCLM uses the Net Promoter System to measure customer satisfaction with contracted and internally provided services. Provider and internal staff members receive a monthly report which outlines their success in creating promoters and enhancing customer service. Feedback received through this process is used to fine tune continuous improvement efforts area wide.

(16) Youth Program Design: Describe the design framework for local youth programs and how the 14 program elements required in §681.460 of the WIOA regulations are made available within that framework (WIOA §129(c)(1)).

In keeping with WIOA requirements, recipients of youth funds through CareerSource CLM will meet eligibility through defined barriers and be aged 14 to 24 at the time of eligibility. All youth will be classified as In School Youth or Out of School Youth based on their eligibility criteria, and, at least 75 percent of local youth funds must be used to assist those who are classified as Out of School.

Youth enrolled with CSCLM will be prepared for post-secondary educational opportunities or employment. Programs and services will link academic and occupational learning. Youth program service providers will have strong ties to businesses, and services provided to youth must include: tutoring, study skills training and instruction leading to completion of secondary school (including dropout prevention), alternative school services, mentoring by appropriate adults, paid and unpaid work experience (such as internships and job shadowing), occupational skills training, leadership development, and appropriate supportive services. The following services, as stated in 20 CFR section 681.460, will be made available to all Youth participants:

1. Tutoring – the youth provider, Eckerd Connects, partners with the Citrus, Levy, and Marion County School Boards including the two career and technical centers to offer tutoring, academic remediation and study skills training. The following instructional activities and curriculums are available: Computer Based Training, Instructor Facilitated, FCAT and GED practice, GED Prep materials (Khan Academy Online), Practice GED exams, My Skills Tutor (an instructional teacher-aided tool that is also used as a one-to-one instructional resource).
2. Alternative Secondary School Services – offered through Florida Sunshine State Standards in partnership with the Citrus, Levy, and Marion County School Boards Alternative Programs.

3. Paid and Unpaid Work Experiences – acceptable in all industries for our youth programs, can be at either private, for profit and/or not-for-profit businesses or organizations. At least 20% of our youth funding (minus administrative expenses) will be used for work experience activities.
4. Occupational Skill Training – youth will have access to occupational training programs in demand areas offered by approved providers.
5. Education offered concurrently with and in the same context as Workforce Preparation Activities – concurrent training and work prep activities are encouraged to increase the participant's occupational skills and their eventual placement in an unsubsidized job. Local programs and services will link academic and occupational learning. Basic skill training will be offered to youth in need to assist while they receive occupational or work readiness training to ensure success.
6. Leadership Development Opportunities – these are offered in group settings, where a leadership topic is presented by a student to their peers. Leadership activities can also take place in the form of community service and volunteer work. Employability Skills and Life Skills curriculums also include leadership development activities.
7. Supportive Services - are available to Youth participants when they are necessary to enable an individual to participate in activities through CSCLM. Supportive services take place in the form of transportation assistance, clothing and uniform allowances, and background checks and childcare. Additional services may be provided and are reviewed on a case-by-case basis.
8. Adult Mentoring – occurs in partnership with other agencies and businesses, independently driven by participant needs. All mentoring activities are case managed and documented.
9. Follow Up Services – are provided for the 12 months following the Youth's exit from the program and will take place once every quarter. Career Coaches will monitor the Youth's progress on the job or in a training program and provide counseling/mentoring as needed.
10. Comprehensive Guidance and Counseling - may be offered through the local youth provider or through a partnering community agency. Will be ongoing through intensive case management or community/locally based programming.
11. Financial Literacy Education – will be provided as part of Work Readiness Training activities in a class setting or individually.

12. Entrepreneurial Skills Training – youth will have access to programs offered through the local Small Business Development Center and Chamber offices in partnership with CareerSource CLM. Community partners and business shadowing may be part of this on an individual basis.
13. Labor Market Information – Youth will have access to up to date Labor Market Information that identifies job vacancies, skills necessary for in-demand jobs, and provides information about local, regional and national employment trends. This will be provided in conjunction with Work Readiness Training.
14. Transition Activities to Post-Secondary Education and Training – career coaches will guide and refer to colleges or technical schools. They will also assist with career exploration and checklists detailing items/activities needed for training/education in their chosen field. Financial aid application assistance will also be provided.

CSCLM has long operated a successful Youth program called Phoenix Rising currently funded by YouthBuild dollars that employs these 14 program elements. This is a community partnership that concentrates on service learning where participants build a house, learn basic construction skills, and engage in leadership activities and classroom training as they work to earn their high school diploma. To date we have been awarded 3 YouthBuild grants through the Department of Labor.

If summer programs are provided to youth, the summer employment opportunities will be linked to academic and occupational learning. The mix of year-round and summer activities is left to local discretion and CSCLM does not maintain a separate appropriation for a “summer” program.

- A. **Define the term “a youth who is unable to compute or solve problems, or read, write, or speak English at a level necessary to function on the job, in the individual’s family, or in society.”**

Describe how the local board defines whether a youth is unable to demonstrate these skills sufficiently to function on the job, in their family, or in society and what assessment instruments are used to make this determination (20 C.F.R. §681.290).

Assessments are used to determine proficiency levels. The most common assessment used is the TABE. Youth are assessed to a grade level of 9. Those youth that lack comprehension or need additional assistance in understanding the assessment may be assisted by a qualified proctor. CareerSource CLM typically assesses mathematical and reading/language comprehension. The assessment results that are scored to less than a 9th grade education are deemed as deficient and therefore unable to compute or solve problems, or read, write, or speak English at a level necessary to function on the job, in the individual’s family, or in society. One on one assessment may be also be

conducted if the customer expresses concerns with their ability to complete a formal assessment. This information may also be shared with the case manager from an educational partner that has also completed such assessment and has deemed the individual deficient.

B. Define “requires additional assistance.”

Describe how the local board defines the term “requires additional assistance” used in determining eligibility for WIOA-funded youth programs (20 CFR §681.300).

The local board classifies the above statement as being valid in regards to eligibility when back-up is presented to the case manager when the following characteristics exists (per local policy *OPS-39 WIOA Eligibility Documentation Listing*)

- A youth that while attending secondary education received/is receiving services under an IEP (Individualized Education Plan), or
- A youth that while attending secondary education compiled/is compiling a record of disciplinary problems as manifested by the mandatory attendance at detention, an alternative school, expulsion, suspension, or participation in an in-school suspension program, or
- A youth that has completed an education program but lacks the appropriate license for the occupation, or
- A youth whose financial aid package is less than or equal to 80% of the federally estimated cost of attendance for the post-secondary institution where enrolled, or
- A youth who has a certificate of attendance from a secondary school system, or
- A youth who has certification/licensure from another state and must challenge the requirements of this state. (Fees for examination of records and eligibility for certification/licensure in this state, fees for license testing preparatory sessions)

Documentation requirements include:

Documentation from an Educational Provider

- Program/School System
- Applicant Statement
- Letter from Business or Educational Staff
- Staff Member
- Telephone Contact Form from a School System

Letter from the School

- Telephone Contact Form from a School System

Copy of the Certificate of Attendance

Copy of Certificate or License

Letter from the School/Financial Aid Office

END OF LOCAL PLAN INSTRUCTIONS



RECORD OF ACTION/APPROVAL

Consortium Meeting Friday, February 28, 2020

TOPIC/ISSUE:

Approval of the CLM By-Laws

BACKGROUND:

WIOA places new requirements on the relationship between the Board and the Local Elected Officials (LEO). These requirements are required in the Board's By-Laws. In addition, it requires that the LEO approve the By-Laws

The changes reflect these requirements:

- Nomination process used by the LEO to select board members and chair
- Term limitations (included in LEO /Board agreement) to ensure staggered terms
- Process to notify the LEO of vacancies
- Use of proxies
- Use of technology to conduct meetings
- Process to ensure that the Board actively participate in convening stakeholders and brokering relationships
- Any other conditions governing appointments or membership(none listed)

POINTS OF CONSIDERATION:

WIOA requires the Board's By-Laws be approved by the Consortium.

STAFF RECOMMENDATIONS:

COMMITTEE ACTION:

BOARD ACTION:

**BY-LAWS OF THE CITRUS LEVY MARION REGIONAL WORKFORCE
DEVELOPMENT BOARD, INC. (CLMRWDB)**

A FLORIDA CORPORATION, NOT FOR PROFIT

**THESE BY-LAWS ARE AMENDED AS APPROVED ON
(DATE) —**

ARTICLE I: NAME, OFFICE AUTHORITY, AND RESPONSIBILITIES:

Section A: The name of the Corporation shall be the Citrus Levy Marion Regional Workforce Development Board, Inc. hereinafter referred to as “the CLMRWDB”.

Section B: The Principal office of the CLMRWDB shall be located at 3003 SW College Rd, Suite 205, Ocala, FL 34474. The CLMRWDB may have such other offices as the Board of Directors may designate or as the business of the CLMRWDB may require from time to time.

Section C: The registered office of the CLMRWDB, required by Florida Corporation Laws to be maintained in the State of Florida may be, but need not be, identical with principal offices in the State of Florida. The registered office of the CLMRWDB shall be in care of Robert A. Stermer, 7480 SW Highway 200, Ocala, FL 34476. The address of the registered office may be changed from time to time by the CLMRWDB.

Section D: The CLMRWDB exists as a result of the passage of the Workforce Innovation and Opportunity Act, Public Law 113-128, the Interlocal Agreement establishing the Citrus Levy Marion Workforce Development Consortium (“Consortium”), -the Memorandum of Agreement between itself and the Consortium, and the Articles of Incorporation of the CLMRWDB. As such, CLMRWDB has been determined to be a Special District of the State of Florida, a unit of state government, and has all the rights granted by such status including, but not limited to, sovereign immunity.

Section E: The CLMRWDB shall have those duties and responsibilities provided for by the WIOA, other related laws of the United States, Florida Statutes (F.S.) Chapter 445, and other applicable laws, rules and policies of the State of Florida, its Articles of Incorporation and any agreements or contracts it may enter into with any third party and such other duties as are consistent with its non-profit status and with the provision of job training, job placement and benefit services to the citizens of Citrus, Levy and Marion Counties, Florida and its status as a unit of state government.

Section F: The CLMRWDB shall actively participate in the development of policies and programs for planning and implementing the activities of the Workforce Development Plan for Workforce Area Ten (Area 10).

Section G: The CLMRWDB shall maintain with the Consortium that relationship specified in the Memorandum of Agreement (“Memorandum”) between the two bodies.

ARTICLE II: COMPOSITION OF MEMBERSHIP; LENGTH OF SERVICE; ATTENDANCE ON THE CLMRWDB:

Section A: The CLMRWDB shall be comprised of not more than thirty-three (33) members who are appointed as set forth in the Agreement to Establish the CLMRWDB. A member may represent more than one federally-mandated membership category. The number of the members on the CLMRWDB shall be ~~initially~~ determined by the Consortium. CLMRWDB membership shall be maintained pursuant to the Memorandum provisions. Replacement of members who resign voluntarily, who are asked to resign or are removed because of unsatisfactory attendance records or other justifiable reason(s) will be in accordance with the Memorandum and any procedures required by the State of Florida or the United States Government.

Section B: It shall be the policy of the CLMRWDB that three (3) absences annually from regularly scheduled CLMRWDB Board or Committee meetings shall constitute just cause for recommendation for removal. A recommendation for removal shall only be made after review by the Executive Committee of the circumstances surrounding the absences. The following procedures shall be followed: The Executive Committee shall meet, discuss the circumstances, and make their determination to remove or not remove the member(s). In the event removal is recommended, the Executive Committee shall make a recommendation for removal of the member(s) to the CLMRWDB at its next meeting. A majority vote of those CLMRWDB members present shall be required for removal. Upon removal, the Consortium will be notified and seek nominations to replace that member.

Section C: The Consortium will be notified of member attendance annually and any members with three (3) unexcused absences or other justifiable reasons for removal and of ~~the subsequent any~~ action taken by the CLMRWDB. The Consortium may, at its discretion, remove any member. It shall immediately seek nominations for a replacement.

Section D: Any member who no longer meets the criteria under which appointed to the CLMRWDB shall notify the Executive Committee in writing within 30 days of that status change, i.e., a private sector representative no longer owns his/her own business, retires from that business, or is no longer an officer, chief executive or chief operating officer of the business concerns under which he/she was appointed to the board. The Executive Committee will review all status changes and make a recommendation to the CLMRWDB. The CLMRWDB shall recommend to the Consortium that any member whose status has changed so as to affect the member's eligibility for continued membership be replaced on the CLMRWDB.

Section E: Board Member Nominations and Selection Process:

Board membership requirements, are detailed in both WIOA and in Florida

Statutes, Section 445

For private sector business representation, nominations must be made by general purpose business organizations. These include chambers of commerce, economic development agencies and business groups such as the Mid-Florida Regional Manufacturers Association (MRMA). Those nominations are provided to the Local Elected official (LEO) for consideration and selection.

Public sector membership will generally be “agency based” and therefore requests for nominees are directed to the agency head for either self - nomination or a designee. These nominations will be submitted to the Consortium for selection.

Recruitment:

Private sector membership is “balanced” by county whenever possible. Letters will be sent to key business organizations in each county soliciting nominations. CLMRWDB members from the county where a vacancy will occur/has occurred will be asked to contact business leaders in their county (in targeted membership sector), explain our Board’s duties as a follow to the letters.

Board member must be:

- Owners
- Key executives; or
- Top-level policy executives

Nomination Process:

- As part of the recruitment/nomination process:

- A nomination form will be completed by each nominee. The form will be transmitted to the CLMRWDB CEO or COO who will submit the form for nomination to the Consortium for consideration and selection.
- If the CLMRWDB board member is working with their county's EDC or a Chamber as part of the recruitment process, that organization should be asked to send an email to the CLMRWDB CEO nominating the prospective member.

Nominations of prospective members will be compiled by the CLM staff and prepared for consideration by the LEO Consortium at its next scheduled meeting. Nominations will be grouped by vacancy.

Appointment Process:

After selection/appointment by the LEO Consortium, staff will:

1. Advise the board members of the selection;
2. Prepare a letter of welcome to be signed by the Chair that will include:
 - a. Information of the next Board meeting, including an invitation to the New Member Reception that will be scheduled one hour prior to the meeting.
 - b. Information of electronic access to the Board – Member Orientation
 - c. Financial Disclosure Form 1 (including information on time-frame for filing and contacts for assistance, if needed;
 - d. Hard copy of a Board Member Handbook
 - i. Committee information for committee selection

New members will be asked to review the electronic Orientation prior to the New Member Reception so that any questions can be answered at that time or they can contact staff prior to the Reception if they desire.

ARTICLE III: OFFICERS AND THEIR DUTIES:

Section A: General:

The officers of the CLMRWDB shall be the Chair, Vice-Chair and Treasurer. The Vice-Chair and Treasurer shall be elected every two years. The Vice-Chair shall ascend to the office of Chair every two years and shall replace the outgoing Chair. The new Vice-Chair shall be elected from among the business and industry (private sector) representatives and shall rotate among the three counties' representatives every two years. The Treasurer shall be elected from the CLMRWDB public sector representatives. Treasurer shall not be eligible to ascend to the position of Chair because of the requirement that the Chair be a private sector representative. Officers shall serve two year terms.

The Executive Assistant to the Chief Executive Officer shall serve as the Secretary to the Board and have the responsibilities of maintaining minutes of the actions of the Board and other such duties that support the Board.

Removal of Officer(s):

Any officer of the Board may be removed with or without cause by an affirmative vote of a majority of the Board of Directors at a called meeting in which a quorum is present. A motion to remove an officer may be made by any board member.

Section B: Chair:

The Chair shall have the responsibility of presiding over CLMRWDB meetings, authority for appointing Committee membership and the Chair for each Committee subject to approval by the Executive Committee. The Chair shall serve as an ex-officio member of all Operational and Ad Hoc Committees, but will not be assigned to any Committee other than the

Executive Committee.

Section C: Vice-Chair:

The Vice-Chair shall preside over the CLMRWDB meetings in the absence of or at the request of the Chair. The Vice-Chair shall also serve as an ex-officio member of all Operational and Ad Hoc Committees, but will not be assigned to any Committee other than the Executive.

Section D: The Treasurer or designee shall receive and deposit all funds in the name of the CLMRWDB in a bank approved by the Board. All checks shall be signed by either the Chief Executive Officer or Chief Operating Officer. Current financial records shall be kept at all times and reports on the financial status of the CLMRWDB shall be submitted at all meetings of the Board and membership, with copies to be attached to original minutes. The Treasurer shall chair the Audit Committee of the Board.

ARTICLE IV: MEETINGS OF THE CLMRWDB:

Section A: Regular Meetings:

The CLMRWDB shall meet quarterly or as determined by the Executive Committee and/or the CLMRWDB from meeting to meeting. All members of the CLMRWDB shall be notified in writing of the date, time, and place of the meetings at least five (5) days in advance. An agenda will be transmitted whenever possible.

Section B: Called Meetings:

The Chair may convene the Board at times other than the regular meetings, provided the CLMRWDB members are notified in writing at least five (5) days in advance of the date, time, and place of the meeting. An agenda will be transmitted with this notification. If the Chair determines that an emergency situation necessitates that a special meeting be called,

the requirements for notice may be waived.

Section C: Quorum of Meetings:

A quorum for all meetings of the CLMRWDB shall be declared when one-third (1/3) of the voting members are present. Once a quorum is declared at any CLMRWDB meeting, the quorum is not lost until the meeting is adjourned.

Section D: Decision on Questions:

The decision on all questions with the exception of amendments to the By-Laws provided for under ARTICLE VIII, shall be determined by a majority vote of the members voting on the question.

Section E: Waiver of Notice:

Whenever, under the laws of the State of Florida, or provisions of these By-laws, a waiver in writing is signed by persons entitled to such notice, whether before or after the time stated therein, it shall be deemed equivalent to the giving of such notice.

Section F: Robert's Rules of Order:

In matters not covered by these By-laws, Robert's Rules of Order, Revised (latest edition), shall govern the procedure of the meetings of the CLMRWDB and its Committees.

Section G: Proxy Voting:

To ensure meaningful discussion and determinations, vote by proxy will not be accepted.

Section H: Use of Technology:

Understanding the business requirements of Board members, CLMRWDB may use any form of technology to conduct the business of its committees and board meetings. If used, the technology must be accessible to the public for attendance. The use of such technology should be included on all meeting notices when used.

Section I: Engagement of Stakeholders

CLMRWDB shall work to ensure engagement by the workforce system's stakeholders and employers by developing a list of Interested Parties. This list will include key business organizations and other groups, such as local SHRM organizations, and community groups that express an interest in workforce activities or services.

Notices of all meetings and agendas will be made available to those on the Interested Parties list. In addition, social media will be used to notify persons and organizations of the meetings of the Board and its committees.

At each meeting of the committees or Board a time for public comment and input will be placed on the agenda, and at the discretion of the Chair of the Board or committee, public input may be sought on any item coming before the body.

ARTICLE V: COMMITTEES OF THE CLMRWDB:

Section A: The CLMRWDB may establish such Operational Committees as are deemed necessary to perform the specific functions of the CLMRWDB. These Committees shall be advisory to the CLMRWDB, except that they may, with specific authorization, act on behalf of the CLMRWDB. The following will be the Committees of the CLMRWDB:

Executive Committee:

This Committee shall be comprised of the Chair, Vice-Chair and Treasurer of the CLMRWDB, the immediate past Chair of the CLMRWDB, and the Chairs of the, four Operational Committees, for a total of eight (8) members, at least two (2) members shall be selected from among the private sector representatives. This Committee shall be responsible for administrative matters of the CLMRWDB, shall serve as the CLMRWDB finance and personnel committee, and as such, shall handle all finance and personnel matters, if any; shall be responsible for all issues, duties and responsibilities dedicated to and by vote of the full CLMRWDB, shall be authorized to act on an emergency basis on behalf of the full CLMRWDB between CLMRWDB meetings, shall recommend and approve formal procurement actions, and shall serve as the grievance/protest committee for all procurement actions.

The following ad hoc committees shall report to the Executive Committee: Audit; Member Recruitment; and, Nominating.

Operational Committees:

CLMRWDB shall have committees aligned with its goals, objectives and management needs. These include: Marketing Outreach and Community Relations; Career Center Services; Performance and Monitoring; and Business and Economic Development

Marketing Outreach and Community Relations:

The Marketing Outreach and Community Relations Committee shall plan and oversee the staff and Board efforts to improve the community awareness of Workforce; establish partnerships with community organizations that have missions similar to or supportive of the goals of the Board; inform the business community and the larger resident community of the region on the services and benefits available through the local workforce system; and, approve the staff marketing and outreach plan to

business and applicant customers. It shall oversee the recruitment and orientation of new board members and strengthen board member engagement.

Career Center:

The Career Center Committee shall provide oversight and input regarding the services offered to both business and applicant customers; the development of partnerships to improve the efficiency and effectiveness of services and otherwise review and plan the partnerships, staffing and services offered through the local one stop system.

Performance and Monitoring:

The Performance and Monitoring Committee is charged with reviewing the performance of our one stop system and contractors against established goals. Additionally, it is charged with receiving and reviewing all internal monitoring, programmatic and fiscal as well as similar monitoring performed by the State. The Committee is also charged with establishing performance goals for the system and reviewing performance comparisons with other workforce boards based upon state performance reports and metrics.

Business and Economic Development:

The Business and Economic Development Committee is charged with aligning the resources of Workforce Connection with the economic development efforts of the three counties. It is also charged with reviewing staff and economic development coordination and collaborative efforts at business outreach and development. The Committee will serve to plan and coordinate the development of career paths, training and other services to support the needs of the business sectors targeted by the Board. It is responsible for the review and approval of demand occupations within the workforce area and, where feasible, coordinate

with other workforce areas to develop regional strategies to serve these targeted sectors and provide coordinated workforce services.

Section B: The Chair of the CLMRWDB shall have authority to appoint members of the CLMRWDB to serve on all Operational Committees subject to the approval of the Executive Committee. Membership on all Operational Committees shall be for one year. Members of the CLMRWDB who are also employees of public sector organizations may delegate other employees of the public sector organization to attend Committee meetings and cast advisory votes. The preceding sentence shall not apply to meetings of the Executive Committee.

In accordance with the above, representatives from key partners not appointed to CLMRWDB will be asked to serve on committees. These partners include, but are not limited to the following: School boards, economic development; private and public higher educational partners; trade associations, social and customer-focused agencies and, organized labor.

The Chair may appoint such other members to the Operational Committees as is necessary to gain broad industry input into the deliberations of the committees. Such members shall be ex-officio and have voting privileges.

Section C: Ad Hoc Committees:

Ad Hoc Committees may be established by the Chair autonomously to deal with matters of particular or immediate concern. Ad Hoc Committees shall be composed of members of the CLMRWDB with their number and representation determined by the Chair subject to approval by the Executive Committee. An Ad Hoc Committee shall be advisory to the CLMRWDB and shall terminate upon satisfactory completion of the task for which it was originally appointed. Non-CLMRWDB members may

serve as voting members of Ad-hoc Committees.

Section D: Special Committees:

Nominating Committee:

The Committee shall be composed of members of the CLMRWDB, appointed by the Chair with appropriate representation from each County of the Area 10. The Committee will meet every other year by the end of May, so that the Committee shall have sufficient time to bring forth a slate of nominees for Vice-Chair and ~~T~~Treasurer to be considered at the June meeting of the CLMRWDB. Should any Officer not be able to complete the officer's term of office, the most recently appointed Nominating Committee shall be convened to draw up a slate of nominees for filling the vacancy or vacancies except in the case of a vacancy in the Chair in which case the Vice-Chair shall ascend to the office of Chair. Nominations to fill such other vacancies shall be presented to the CLMRWDB for election as soon as possible following the occurrence of the vacancy or vacancies. Those officers selected by CLMRWDB, shall be recommended for selection by the Consortium

Audit:

The Audit Committee shall be chaired by the Treasurer and assume responsibility for recommending the selection of the Board's audit firm; and reviewing each annual audit prior to presentation to the Board.

Section E: Quorum:

A quorum for all Committee meetings of the CLMRWDB shall be declared when one-third (1/3) of the members are present. Once a quorum is declared at any CLMRWDB meeting, the quorum is not lost until the meeting is adjourned.

Section F: Chair for Operational Committees and Ad Hoc Committees:

The Chair of the CLMRWDB shall appoint the Chair for Operational Committees and Youth Council and of any Ad Hoc Committees subject to the approval of the Executive Committee.

Section G: Appointment of Committee Vice-Chairs:

The Chair for any Operational Committees or of an Ad Hoc Committee may appoint the Committee Vice-Chair from among the other members of the Committee.

Section H: Replacement of Committee Members:

The Chair of the CLMRWDB may replace any Committee member, after consultation with the committee member, and after considering the recommendations of the Chair of the Committee and subject to the approval of the Executive Committee.

ARTICLE VI: RIGHTS OF MEMBERS TO MOTION, SECOND AND VOTE:

Section A: All members of the CLMRWDB, including Committee Vice-Chairs presiding over Committee meetings, shall have the right to make and second motions, discuss and vote on any matter, notwithstanding the provisions of ARTICLE VIII, that is in order for CLMRWDB or Committee consideration, excepting that the CLMRWDB Chair when presiding over meetings of the CLMRWDB, shall only have the rights of discussion and of voting to break a tie vote of the CLMRWDB.

ARTICLE VII: CONFLICT OF INTEREST:

Section A: The CLMRWDB shall not, either directly or indirectly purchase, rent, or lease any realty, goods or services from any business entity of which any CLMRWDB member, the member's spouse or child is an officer, partner, director, or proprietor or in which they have any material interest.

Section B: There is hereby declared to be an exemption from Section “A” hereof, in accordance with Section 112.313(12) Florida Statutes, 1995, if:

- a. The business with the CLMRWDB is transacted under a rotation system whereby the business transactions are rotated among all qualified suppliers of the goods and services within the Workforce Area 10 service delivery area;
- b. The business is awarded under a system of sealed competitive bidding to the lowest or best bidder;
- c. The CLMRWDB member, the member’s spouse or child, has in no way participated in the determination of the bid specifications or the determination of the lowest or best bidder;
- d. The CLMRWDB member, the member’s spouse or child, has in no way used or attempted to use their influence to persuade the CLMRWDB or any personnel thereof to enter into such a contract other than by the mere submission of the bid; and
- e. The CLMRWDB member, prior to or at the time of the submission of the bid, has filed Contractor Disclosure Form and Conflict of Interest Forms disclosing the member’s interest, or the interest of the member’s spouse or child, and the nature of the intended business; and
- f. If CLMRWDB enters into a contract with an organization or individual represented on the Board of Directors, the contract must be approved by a 2/3 vote of the quorum of the Board, with the benefiting member abstaining from the vote (Florida Statutes 445.007(1)).
- g. If any other exemption created under Section 112.313(12) Florida

Statutes or any other applicable Florida or United States statutes applies.

ARTICLE VIII: AMENDMENTS:

Section A: These By-laws may be amended or repealed by a two-thirds (2/3) vote of the CLMRWDB members voting on the question provided notice of the Amendment or request for repeal has been transmitted to members at least five (5) days in advance of the meeting in which the vote is to be taken.

ARTICLE IX: EXEMPT ACTIVITIES:

Section A: Notwithstanding any other provisions of these By-laws, no Member, Director, Officer, Employee or Representative of this Corporation shall take any action or carry on any activities by or on behalf of the Corporation, not permitted to be taken or carried on by an organization exempt under Section 501(c)(3) of the Internal Revenue Code and its regulations as they now exist or may hereafter be amended or by an organization, contributions to which are deductible under Section 170(c)(2) of such code and regulations as they now exist or as they may hereafter be amended.

ARTICLE X: INDEMNIFICATION BY CORPORATION:

Section A: Every Person who is or shall be or shall have been a Member or an Officer of the CLMRWDB and that person's Personal Representative shall be indemnified by the CLMRWDB against all costs and expenses reasonably incurred by or imposed upon that person in connection with or resulting from any actions, suit, or proceeding to which that person may be made a party by reason of being or having been a Member or Officer of the CLMRWDB, or of any subsidiary or affiliate thereof, except in relation to such matters as to which that person shall finally be adjudicated in such action, suit or proceeding to

have acted in bad faith and to have been liable by a reason of willfulness of conduct in the performance of his duty as such Member or Officer. "Costs and Expenses" shall include, but without limiting the generality thereof, attorney's fees, damages and reasonable amounts paid in settlement.

ARTICLE XI: CODE OF CONDUCT AND ETHICS:

- A. CLMRWDB's Officers, Members, Employees or Agents shall not solicit gratuities nor accept favors or anything of monetary value in excess of \$25.00 from each other or from vendors, contractors or potential vendors or contractors. Violations of this standard will result in disciplinary action being taken. Appropriate disciplinary action will be determined by an Ad Hoc Committee of the CLMRWDB whose members will be free from any conflict of interest related to the party or parties involved.
- B. Except as allowed by applicable law, any Contractor or CLMRWDB Officer, Member, Employee or Agent who develops or drafts specifications, requirements, statements of work, invitations for bids, and/or requests for proposals shall be excluded from competing for such procurement. Further, except as allowed by applicable law, Persons, Organizations, and Employees in any way associated with such Officer, Member, Employee or Agent shall be excluded from competing for such procurement when a conflict of interest situation would be created by such competition.
- C. Except as allowed by applicable law no CLMRWDB Officer, Member, Employee or Agent shall participate in the selection, award, or administration of a contract where, to the best of the person's knowledge, the person or the person's immediate family, partners or organizations in which the person or the person's immediate family has a financial interest, or with whom the person is negotiating has any arrangement concerning prospective employment.
- D. No CLMRWDB Officer or Member shall discuss or vote on any proposal which is

in competition with a proposal submitted by any party with whom the Officer or Member, or the Officer or Member's immediate family, has business, organizational or family ties.

- E. Arm's length relationships shall be maintained between contractors and CLMRWDB Officers, Members, Employees and Agents in the award and administration of contracts.
- F. Meetings of the CLMRWDB, its Committees, and between members, shall comply with the Florida Government in the Sunshine Act, Florida Statutes, Section 286.011.
- G. CLMRWDB Officers, Members and Employees shall complete a Disclosure of Potential Conflicts and Certification/Code of Conduct/Ethics Form (ADM-2) annually by July 1st, and a copy should be returned to CLMRWDB Administrative Office to be kept on file for the CLMRWDB.
- H. CLMRWDB Officers and Members shall complete a Financial Disclosure (Form 1) annually by July 1st, and should be filed with the Supervisor of Elections of the county in which they permanently reside.
- I. Upon discovery of an actual or potential conflict of interest, a CLMRWDB Officer, Member, Employee or Agent shall promptly file a written statement of disqualification and shall withdraw from any further participation in the transaction involved. The Officer, Member, Employee or Agent may, at the same time, apply to CLMRWDB's Legal Counsel for an advisory opinion as to what further participation, if any, the Officer, Member, Employee or Agent may have in the transaction.

| a. No ~~e~~Eemployee shall:

- i. Accept any direct or indirect financial benefit from any source other than the CLMRWDB as a result of the performance of official duties.

- ii. Accept any position, whether compensated or uncompensated, which will impair independence of judgment in the exercise of official duties.
- iii. Accept any position or engage in any business which will require disclosure of information that could provide a competitive advantage to one party over another in procurement matters.
- iv. Improperly disclose information acquired in the performance of official duties that could result in personal gain or provide a party a competitive advantage over another party in procurement matters.
- v. Use or attempt to use official position to secure unwarranted privileges or exemptions personally or on behalf of others or give the appearance of such action.
- vi. By conduct, give reasonable basis for the impression that any person or organization can improperly influence the performance of official duties.
- vii. Pursue a course of conduct which will raise suspicion among citizens that acts engaged in are in violation of public trust.
- viii. Pursue a course of conduct which will give rise to a violation of conflict of interest standards.
- ix. Take part in any prohibited political activities.
- x. Take part in any religious or anti-religious activity in the discharge of official responsibilities.
- xi. Promote or oppose unionization in the discharge of official duties.
- xii. Participate in any effort to violate any other applicable Federal,

| -State or Local Law or Regulation.

Violations of any provision of this Code may be cause for immediate dismissal or other disciplinary actions provided for under the CLMRWDB's Personnel Rules and Policies.

ARTICLE XII: NONDISCRIMINATION:

Section A: All actions taken by the CLMRWDB shall be made without regard to age, sex, race, religion, national origin, political affiliation, marital status, other prohibited bases under applicable law or handicap.

SIGNATURE PAGE

APPROVED:

CLMRWDB Chair

CLMRWDB Vice-Chair

Board Attorney

ATTEST:

CLMRWDB Treasurer