



AGENDA

Friday, June 12, 2020 – 9:00 a.m.

Zoom Meeting Info: <https://us02web.zoom.us/j/83169102841>

Meeting ID: 831 6910 2841

Conference Line: 16465588656 **Code:** 83169102841#

Call to Order		J. Smith
Roll Call		C. Schnettler
Approval of Minutes, February 28, 2020	Pages 2 - 3	J. Smith

DISCUSSION ITEMS

DEO Reemployment Assistance		R. Skinner
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ACTION ITEMS

Board Member Appointments	Pages 4 - 7	R. Skinner
Sub-grantee Agreement	Pages 8 - 32	R. Skinner
Direct Service Provider	Pages 33	D. French
Budget 2020-2021	Pages 34 - 38	R. Skinner
2020 – 2021 Annual Plan	Pages 39 - 130	R. Skinner

PROJECT UPDATES

End of Assistance to Region 9- Alachua and Bradford Counties		R. Skinner
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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: February 28, 2020
PLACE: College Of Central Florida, Enterprise Center, Building 42, Ocala, FL
TIME: 10:00 a.m.

MEMBERS PRESENT

Commissioner Smith
Commissioner Gold
Commissioner Meeks

MEMBERS ABSENT

OTHER ATTENDEES

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

CALL TO ORDER

The meeting was called to order by Commissioner Smith, at 10:05 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 June 19, 2019 meeting. Commissioner Gold seconded the motion. Motion carried.

DISCUSSION ITEMS

County Liability

Rusty Skinner informed the members that in an effort to increase communication and educate county officials of their liability and responsibility of their local workforce boards, the State may have representatives from the Florida Association of Counties contacting officials. Rusty Skinner notified the members that he would be happy to visit with each county commission to answer any questions if needed.

Senate Bill 1244 / House Bill 1271

The Bills being considered will restructure the responsibilities of DEO and the CareerSource Florida board. The potential changes will impact the flexibility on the local level. The Governor is supporting the Bills.

WIOA Primer for Elected Officials

Rusty Skinner explained to the board that the attached WIOA Primer was created by an attorney that is considered an expert in WIOA law. The document acts as a guide for county officials, outlining the authority and responsibilities of all the partners in the workforce system.

ACTION ITEMS

LEO Agreement, Inter-Local Agreement, and By-Laws

Rusty Skinner briefly outlined the components of the three documents, their purpose, and noting the changes to the By-Laws. Commissioner Meeks made a motion to accept the LEO Agreement, Inter-Local Agreement and changes to the By-Laws. Commissioner Gold seconded the motion. Motion carried.

Re-Appointment of Board Members

Commissioner Gold made a motion to accept the reappointment of the members listed on the Action Sheet. Commissioner Meeks seconded the motion. In discussion, Commissioner Meeks asked if the members had been contacted to confirm their continued board membership. Rusty Skinner responded that they had been contacted. Motion carried.

Board Member Appointments

Commissioner Gold made a motion to appoint Arno Proctor, Angie White, Nicole Nash, as new members of the board, as well as adding current board member Fred Morgan in a secondary position as the Apprenticeship representative. Commissioner Smith seconded the motion. Motion carried.

Local Plan – Initial Draft

Rusty Skinner highlighted aspects of the Local Plan, noting the efforts in apprenticeship programs, youth programs, and utilizing online resources, such as the Metrix Learning software. The initial submittal to DEO is March 16, 2020. Commissioner Gold made a motion to accept and submit the Plan. Commissioner Meeks seconded the motion. Motion carried.

PROJECT UPDATES

None

MATTERS FROM THE FLOOR

Rusty Skinner invited the members to attend the second annual State of the Workforce Conference on April 23, 2020. The Conference will focus on retention. A retention survey is in process and the results of that survey will be presented during the Conference. The speakers will highlight innovative retention strategies. The Bridging the Gap award will also be presented.

ADJOURNMENT

There being no further business, the meeting was adjourned at 11:00 a.m.

APPROVED:



RECORD OF ACTION/APPROVAL

Consortium Meeting Friday, June 12, 2020

TOPIC/ISSUE:

Board Member Appointments

BACKGROUND:

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

Private Sector: 4 vacancies: 3 Levy County; 1 Marion County

POINTS OF CONSIDERATION:

The following nominations are provided:

Mid-Florida Manufacturers Association:

John Hemken: A&M Manufacturing, Levy County

Private Sector:

Stacy Swain, The Burger House, Levy County

STAFF RECOMMENDATIONS:

Approve nominations

COMMITTEE ACTION:

BOARD ACTION:



NOMINATION FORM

FAX: 352 873-7956

EMAIL: rskinner@careersourceclm.com

Phone: 352 873-7939, Ext 1204

Stacy Swain

Name: _____

Owner

Title: _____

Address: _____
6891 NW 60th Ave

City: _____ Chiefland _____ Levy _____ Zip 32626
County: _____ Code _____

☒ Private Business Owner/Chief Executive

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

Name of Business: _____

Address: _____
15 East Rodgers Blvd

City: _____ Chiefland _____ Levy _____ Zip 32626
County: _____ Code _____

Business Telephone: _____ 352-493-2687 Fax #: _____

Cell #: 727-364-1720

E-Mail Address: _____
Stacyswain@me.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@careersourceclm.com at least three business days in advance. CareerSource Florida Member.



NOMINATION FORM

FAX: 352 873-7956

EMAIL: rskinner@careersourceclm.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@careersourceclm.com at least three business days in advance. CareerSource Florida Member.

BOARD MEMBERSHIP TERMS - 3/11/2020

	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	7/1/2019	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	Nicole Nash	2/28/2020	3	2022
7	Private Sector	William Burda	5/1/2017	4	2021
8	Private Sector	Mike Melfi	6/28/2016	4	2023
9	Private Sector	Kevin Cunningham	6/28/2016	5	2021
10	Private Sector	Al Jones	5/10/2017	4	2023
	LEVY COUNTY	NAME	APPOINTED		TERM EXPIRES
1	Economic Development	David Pieklik	7/1/2019	1	2024
2	Labor	Nelson Mathis, Jr	6/28/2016	4	2024
3	Private Sector	Arno Proctor	2/28/2020	4	2024
4	Private Sector	Vacant		3	2024
5	Private Sector	Vacant		2	2020
6	Private Sector	Vacant		2	2021
7	Private Sector	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	2/28/2020	3	2024
3	CBO/ Barriers	Charles Harris	1/25/2018	3	2021
4	Higher Education-Private	Pete Beasley	6/28/2016	4	2024
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	Pat Reddish	6/28/2016	3	2022
9	Private Sector	Jeff Chang	2/25/2019	4	2023
10	Private Sector	Darlene Goddard	6/28/2016	5	2021
11	Private Sector	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	2/28/2020	4	2024
3	Youth Serving Organization	Jorge Martinez	6/28/2016	3	2022



RECORD OF ACTION/APPROVAL

**Consortium – Friday, June 12, 2020
Board Meeting - Wednesday, June 3, 2020**

TOPIC/ISSUE:

Sub-grantee Agreement

BACKGROUND:

DEO has reviewed comments submitted during the comment period and issued the final Agreement. The Agreement requires the signature of the Consortium Chair and the Board Chair. It must be signed and returned to DEO by July 17, 2020.

POINTS OF CONSIDERATION:

While few changes have been made as a result of the comments submitted, the Agreement is necessary for continuation of funding.

STAFF RECOMMENDATIONS:

Approve the Agreement and Authorize the Council Chair to sign.

COMMITTEE ACTION:

BOARD ACTION:

Kevin Cunningham made a motion to approve the Agreement and Authorize the Council Chair to sign. Bruce Register seconded the motion. Motion carried.

**AGREEMENT
BETWEEN CAREERSOURCE CITRUS LEVY MARION
AND THE
FLORIDA DEPARTMENT OF ECONOMIC OPPORTUNITY**

This Agreement is entered into between the State of Florida, Department of Economic Opportunity (“DEO”), and Citrus Levy Marion Regional Workforce Development Board, Inc., d/b/a CareerSource Citrus Levy Marion (“Board” or “Subrecipient”). DEO and the Board are sometimes referred to herein individually as a “Party” and collectively as “the Parties.”

WHEREAS, DEO is Florida’s designated state agency for receipt of federal workforce development funds, and is required to carry out the duties and responsibilities assigned by the Governor under each federal grant assigned to DEO; and

WHEREAS, the Board is a “subrecipient” of funds (as that term is defined by federal law), and a “recipient” of funds (as that term is defined by state law); and

WHEREAS, pursuant to section 121(h) of the Workforce Innovation and Opportunity Act (Pub. L. 113-128) and section 445.009(2)(c), Florida Statutes, DEO and the Board intend for this Agreement to satisfy the requirements that the Board enter into a memorandum of understanding and infrastructure funding agreement with each mandatory or optional partner participating in the one-stop delivery system.

1. DEFINITIONS AND ACRONYMS.

- a. **“Board”** means the Local Workforce Development Board
- b. **“CDBG-DR”** means Community Development Block Grant-Disaster Recovery.
- c. **“CFR”** means Code of Federal Regulations.
- d. **“CLEO”** means the Chief Local Elected Official.
- e. **“DCF”** means the Florida Department of Children and Families.
- f. **“FDLE”** means the Florida Department of Law Enforcement.
- g. **“LWDA”** means Local Workforce Development Area.
- h. **“MOU”** means Memorandum of Understanding.
- i. **“NFA”** means Notice of Award/Notice of Fund Availability.
- j. **“RA”** means Reemployment Assistance.
- k. **“SNAP E&T”** means the Supplemental Nutrition Assistance Program Employment & Training program.
- l. **“State Board”** means the State Workforce Development Board.
- m. **“TAA”** means Trade Adjustment Assistance.
- n. **“WIOA”** means the Workforce Innovation and Opportunity Act.
- o. **“WP”** means the Wagner-Peyser Act.
- p. **“WT”** means the Welfare Transition program.

- 2. TERM AND EXPIRATION.** The Effective Date of this Agreement is July 1, 2020. This Agreement ends on June 30, 2021 (the “Expiration Date”), unless otherwise terminated as set forth herein. This Agreement may be renewed or extended for a period of time to be determined by DEO in its sole discretion, and without the Board’s approval, at any time prior to the Expiration Date. This Agreement terminates, supersedes, and replaces any prior agreement in effect between DEO and the Board regarding the subject matter set forth herein as of the Effective Date. The period between the Effective Date and the Expiration Date or the termination date is the “Agreement Period”. Subrecipient is absolutely responsible for all work performed and all expenses incurred in fulfilling the obligations of this Agreement. If the LWDA is redesignated in whole or in part, or the Board is decertified, then DEO may terminate this Agreement. If DEO elects to terminate this Agreement, then DEO will notify the Board and the CLEO of such termination, when the termination becomes effective, and any termination instructions.

3. FISCAL AND ADMINISTRATIVE CONTROLS.

- a. DEO will provide funds in consideration for the Subrecipient’s successful performance under this Agreement. The State of Florida’s and DEO’s performance and obligation to pay under this Agreement is contingent upon

an annual appropriation by the Legislature of the State of Florida. DEO shall have final authority as to both the availability of funds and what constitutes an “annual appropriation” of funds. The lack of appropriation or availability of funds shall not create DEO’s default under this Agreement. If there is a state or federal funding shortfall, then the funding otherwise made available under this Agreement may be reduced. The Subrecipient shall not expend funding provided under this Agreement or made available pursuant to any NFA to pay any costs incurred in connection with any defense against any claim or appeal of the State of Florida or any agency or instrumentality thereof (including DEO) or to pay any costs incurred in connection with the prosecution of any claim or appeal against the State of Florida or any agency or instrumentality thereof (including DEO), which the Subrecipient instituted or in which the Subrecipient has joined as a claimant.

- b. DEO will make funding available to the Subrecipient by issuing NFAs through DEO’s financial management information system. Each NFA may list or incorporate specific terms, conditions, assurances, restrictions, or other instructions applicable to the funds provided by the NFA. The Subrecipient’s receipt of funding made under an NFA may be conditioned upon the Subrecipient’s successful performance of certain requirements prior to the receipt of such funding. The Subrecipient must comply with all terms, conditions, assurances, restrictions, or other instructions contained within the NFA as a condition precedent to the Subrecipient’s receipt of funding set forth in the NFA. Except as specifically set forth herein, if a conflict between the terms of this Agreement and any NFA, the terms of the NFA shall control.
- c. Accountability for Funds.
 - i. Reduction or Suspension of Funding. DEO may partially, completely, temporarily or permanently, reduce or suspend any funding provided under this Agreement or funding made available pursuant to an NFA, if the Subrecipient fails to comply with all applicable state and federal laws, rules, and regulations, or the terms of this Agreement or any NFA. DEO will exercise its authority to reduce or suspend funding in accordance with the applicable federal and state laws, rules, regulations, and policies.
 - ii. Recoupment. Notwithstanding anything in this Agreement or any NFA to the contrary, DEO has an absolute right to recoup funds. DEO may refuse to reimburse the Subrecipient for any cost if DEO determines that such cost was not incurred in compliance with the terms of this Agreement. DEO may demand a return of funds if DEO terminates this Agreement.
 - iii. Overpayments. If the Subrecipient’s (a) noncompliance with this Agreement or any applicable federal, state, or local law, rule, regulation, or ordinance, terms of any NFA, or (b) performance or nonperformance of any term or condition of this Agreement results in (i) an unlawful use of funds; (ii) a use of funds that doesn’t comply with the terms of this Agreement; or (iii) a use which constitutes a receipt of funds to which the Subrecipient is not entitled (each such event an “Overpayment”), then the Subrecipient shall return such Overpayment of funds to DEO.
 - iv. Discovery of Overpayments. The Subrecipient shall refund any Overpayment of funds to DEO within 30 days of the Subrecipient’s discovery of an Overpayment or receipt of notification from DEO that an Overpayment has occurred. DEO is the final authority as to what may constitute an Overpayment of funds. Refunds should be sent to DEO’s Agreement Manager and made payable to the “Department of Economic Opportunity”. Should repayment not be made in a timely manner, DEO may charge interest at the lawful rate of interest on the outstanding balance beginning 30 days after the date of notification or discovery.
- d. By signature below, the Subrecipient certifies to DEO that it has written administrative procedures, processes, and fiscal controls in place for the operation of WIOA, WP, TAA, SNAP E&T, WT, CDBG-DR and any other program for which the Subrecipient receives funds from DEO. The written administrative procedures, processes, and fiscal controls described in this paragraph must, at minimum, comply with applicable state and federal law, rules, regulations, policies, guidance, and the terms of this Agreement. DEO may request copies of the Board’s written procedures and policies for review. As needed, DEO shall provide guidance and technical assistance to the Subrecipient to ensure compliance with this section. If the Subrecipient cannot certify that it has written administrative procedures, processes, and fiscal controls in place for the operation of any program for which it may receive funds at a future date, then as a condition precedent to the award of any funds, the Subrecipient shall

establish and adopt such written administrative procedures, processes, and fiscal controls, as necessary for the applicable program.

- e. By signature below, the Subrecipient certifies that it has written administrative procedures, processes, and fiscal controls in place for the payment of supportive services including, but not limited to prepaid gas or prepaid debit cards. Controls must address issuance, storage, and reconciliation of prepaid gas or prepaid debit cards. The Subrecipient must maintain documentation supporting the eligibility of the receipt of supportive services and that the value of the supportive service is consistent with the documented need of the participant.
- f. The Subrecipient shall manage, maintain, and properly dispose of program and financial records in accordance with governing state and federal laws and regulations.
- g. The Board will appoint at least one Regional Security Officer that is responsible for ensuring the Board's compliance with all information system security matters and system access control for users of DEO-owned systems. The Regional Security Officer will comply with policies and requirements imposed by DEO. The Subrecipient will designate a custodian for purchased property and equipment that will be responsible for ensuring the Subrecipient's compliance with 2 CFR §§ 200.310-200.316.
- h. The Subrecipient is responsible for managing real property and leases for all space utilized in the one-stop delivery system. The Subrecipient and its designated one-stop operator or managing partner shall be responsible for all activities involved in securing space for local career centers, ensuring payment to lessors, and cost allocating rent charges, and otherwise managing leases.
- i. The Subrecipient will comply with all federal and state laws, policies, guidance, plans, or other similar documents produced, approved, or disseminated by DEO, the State Board, or any other entity whose funds are made available to the Subrecipient through DEO. These documents will be made available on DEO's website or distributed to the Subrecipient through other means.
- j. Funds provided to the Subrecipient by DEO may not be used to pay consultants in excess of \$710 per day and must be documented as reasonable and necessary.

4. PERFORMANCE, REPORTING, MONITORING, AND AUDITING.

- a. DEO may request any information at any time from the Subrecipient. The Subrecipient shall provide any requested information in the form and manner requested by DEO, within the time frame established by DEO, so DEO may review the Board's performance and compliance and compile and submit information to the appropriate parties. The Board shall provide timely electronic data to DEO, via the electronic financial and programmatic data systems established by DEO in order to allow DEO to provide accurate reports to state and federal funding agencies, the State Board, and other interested parties, and to review the Board's fiscal status and performance.
- b. The Subrecipient will comply with the audit requirements set forth in Exhibit A on an annual basis and take prompt corrective action with respect to any audit findings.
- c. The Subrecipient shall allow access to representatives of DEO, DEO's Office of Inspector General and Office of Civil Rights, appropriate representatives from other state and federal funding agencies, and any other entity authorized by law for the purposes of conducting monitoring, reviews, inspections, investigations, proceedings, hearings, or audits (each a "Compliance Review"). The Subrecipient will fully cooperate with any Compliance Review conducted pursuant to this section. Failure to fully cooperate will constitute a material breach of this Agreement and may result in the termination or suspension of this Agreement and any funding provided by DEO. DEO reserves the right to, in its sole discretion, decide what constitutes full cooperation under this paragraph. DEO may exercise its rights under this paragraph at any time and as frequently as DEO deems necessary. The Subrecipient will reimburse DEO for all reasonable costs incurred by DEO for any activity conducted pursuant to this section that results in the suspension or termination of this Agreement. The Subrecipient will not be

responsible for costs incurred from activities conducted under this section that do not result in the suspension or termination of this Agreement. Nothing in paragraph (b) of this section, or Exhibit A, is intended to limit the terms of this paragraph (c).

- d. Annually, the subrecipient shall submit the following information electronically to FMA-RWB@deo.myflorida.com by the deadlines prescribed below:
- Completed Salary Cap by April 1;
 - Annual detailed budget of revenues and expenditures by funding source by October 1; and
 - Completed Internal Control Questionnaire signed by Board Chair and Executive Director by September 30.
- e. The State Board and DEO have established special guidelines concerning audit quality as guidance for the Board. For the procurement of the audit services, the Board must procure these services in accordance with Florida Statutes. As part of these guidelines, the Board is also required to communicate to their independent auditors (auditor) the following procedures that must be performed:
- i. It is essential that the auditor test the Board's reconciliation of its financial records to the Subrecipient Enterprise Resource Application (SERA) maintained by DEO. The auditor should include a note to the financial statements confirming whether such a reconciliation was performed by the Board in a satisfactory manner.
 - ii. Auditors are required under federal audit guidelines to test compliance with federal cash management requirements and to report any material problems. However, the State Board and DEO have established state level guidance for cash management that should also be tested. The auditor should review the key guidelines contained in the SERA Manual produced by DEO concerning cash management, especially the criteria for Allowable Cash on Hand, and conduct the appropriate tests of compliance.
 - iii. It is required that auditors always prepare and submit a management letter for those findings and observations not included in the audit report, as opposed to providing only a verbal briefing. The Board must prepare a written statement of explanation or rebuttal, including corrective actions to be taken, concerning the deficiencies cited in the management letter. NOTE: If a management letter is not present, this should be stated in the schedule of findings and questioned costs.
 - iv. All funds overseen, managed, or administered by the Board must be included in the scope of the audit and within the audited financial statements. This includes funds that are provided to any auxiliary entity over which the Board or Board's leadership exercises any controlling influence, such as a foundation or an association. For purposes of this guidance document, all foundations, associations, or other similar entities are considered to be affiliated organizations and, in some instances, may need to be classified as a component unit.
 - v. For any affiliated organization, at a minimum the audit report should disclose the entity's mission or purpose; any and all controlling members; summarized financial data including total assets, liabilities, net assets, revenues, expenditures; sources of all revenues; the entity's relationship to the Board's activities; and a statement that the activities of the entity comply with Federal Regulations and Florida Statutes, as applicable. The auditor may need to provide other disclosures and presentations (such as consolidated financial statement) as appropriate after giving proper consideration of applicable accounting standards pronouncements regarding reporting of related entities.
 - vi. The auditor should state in the Report on Compliance and Internal Control over Compliance Applicable to Each Major Federal Awards Program that the audit was conducted in accordance with the special audit guidance provided by the DEO.
 - vii. The Board must limit the audit services to no more than five years and then must follow Florida

Statutes and its own policies to competitively re-procure these services. The previous audit firm may be awarded the new contract for audit services through the competitive procurement if the lead partner of the audit firm had not been engaged with the Board for any of the previous five years.

- f. DEO will meet at least annually with the CLEO and the Board to review the Board's performance and compliance and will notify the Board's Chief Executive Officer and CLEO in writing of any findings, deficiencies, recommendations, or other areas of concern. The Board's failure to meet its negotiated level of performance or its failure to comply with state and federal laws, regulations, standards or the terms of agreements between the Board and DEO may constitute grounds for corrective measures, sanctions and remedies, consistent with WIOA and any policies of DEO or the State Board. DEO may require corrective measures be taken in accordance with a Performance Improvement Plan, or other appropriate action, developed by DEO. The Board's failure to comply with the terms of any Performance Improvement Plan or other appropriate action will constitute a material breach of this Agreement, may result in the suspension or termination of this Agreement, the reduction or withholding of funding provided under this Agreement, or any other sanction or remedy available to DEO by law.

5. THE BOARD'S ONE-STOP DELIVERY SYSTEM. The Board shall operate at least one physical comprehensive career center with access to partner programs, services, and activities in accordance with 20 CFR 678.300(c) and 678.305. The Board shall designate a one-stop operator in accordance with 20 CFR 678.605-678.625, Section 445.009, F.S., and applicable policies, including the following one-stop delivery system requirements:

- a. Each partner program in the Board's career centers will contribute to infrastructure costs at a rate negotiated and agreed upon by the Parties, or pursuant to a policy established by the Governor. The following infrastructure elements, set forth specifically in 20 CFR 678.755, must be incorporated into the period of time in which the infrastructure funding agreement is effective. This may be a different time period than the duration of the MOU.
- b. Identification of an infrastructure and shared services budget that will be periodically reconciled against actual costs incurred and adjusted accordingly to ensure that it reflects a cost allocation methodology that demonstrates how infrastructure costs are charged to each partner in proportion to its use of the career center and relative benefit received, and that complies with 2 CFR part 200 (or any corresponding similar regulation or ruling).
- c. Identification of all career center partners, chief local elected officials, and Board participating in the infrastructure funding arrangement.
- d. Steps the Board, chief local elected officials, and career center partners used to reach consensus or an assurance that the local area followed the guidance for the State funding process.
- e. Description of the process to be used among partners to resolve issues during the MOU duration period when consensus cannot be reached.
- f. Description of the periodic modification and review process to ensure equitable benefit among one- stop partners.
- g. The Board shall incorporate infrastructure funding provisions in each memorandum of understanding with its one-stop partners. Remedies for nonperformance must also be included.

6. SERVICES DELIVERED BY DEO STAFF WITHIN THE BOARD'S ONE-STOP DELIVERY SYSTEM.

- a. Certain workforce program services will be performed by DEO staff assigned to work under the functional supervision and direction of the Board. These services include WP services, TAA services, services to veterans, services to migrant and seasonal farmworkers, and other workforce services as agreed upon by the Parties. The provision of these services will be consistent with applicable federal and state law, rules, regulations, policies, and guidance, and State Board policies. The Board will refer any question or conflict regarding management of DEO staff to DEO for resolution.
- b. The Parties shall maintain a staffing structure chart describing each career center site location, the designated one-

stop operator or managing partner at the site location, all DEO staff placed at the site location, and the position classification and program assignment for each DEO staff member working at the site location. The Board must provide a copy of the staffing structure in an organizational chart to DEO Human Resources annually by July 1 or within 30 days upon changes to the organizational structure. All necessary changes to the staffing structure chart will be made by the Parties in a timely fashion.

- c. The Board will provide DEO information and recommendations regarding the performance of DEO staff assigned to the Board pursuant to a procedure developed and implemented by the Parties. The Board shall exercise due care with respect to its submission of information concerning the performance of DEO staff. DEO will act on the information provided by the Board, but the ultimate decision for any personnel action remains with DEO.
- d. DEO staff assigned to the Board are subject to all statutes and rules applicable to State Personnel System employees and all DEO policies - including DEO's travel, leave, and time distribution policies. DEO staff assigned to the Board will be required to obtain their local manager's approval prior to taking leave.
- e. The Board shall consult with DEO with regard to any issues that may affect, or be in conflict with, the terms or conditions of the collective bargaining agreement for any DEO staff holding positions covered by a collective bargaining agreement. DEO will provide guidance to the Board upon request for the purpose of ensuring compliance with terms of any applicable collective bargaining agreement.
- f. DEO retains ultimate decision-making authority with respect to wages, salary, benefits, hiring, firing, discipline, and promotion of DEO staff.
- g. The Board will appoint a local personnel liaison for the purpose of coordinating personnel related activities for DEO staff. The personnel liaison must be a DEO staff member. The Board will provide the name and contact information of the designated personnel liaison to the DEO Human Resource Office upon designation of this staff member and thereafter annually or upon changes in the designated staff member.
- h. The Board shall jointly plan with DEO for the use of resources available to each partner to ensure a coordinated and efficient approach to the delivery of customer services. The Board will provide the services outlined in section 445.009, Florida Statutes. The Board will also provide basic and individualized career services pursuant to section 134(c)(2) of WIOA, access to training services pursuant to section 134(c)(3)(D) of WIOA, access to programs and activities carried out by the Board's partners listed in 20 CFR 678.400 through 678.410, including the Employment Service program authorized under WP, as amended by WIOA Title III, services to employers as outlined in 20 CFR 680.140(b)(2), and workforce and labor market information. For clarification purposes, "basic career services" are referred to as "core services" in section 445.009(6)(a)(c), Florida Statutes, and "individualized career services" are referred to as "intensive services" in section 445.009(7), Florida Statutes.
- i. The Board will develop methods for referring individuals between its one-stop operator(s) and its partners for appropriate services and activities.

7. OPEN GOVERNMENT AND CONFIDENTIALITY.

- a. The Board is subject to Chapters 119 and 286 of the Florida Statutes. The Board is responsible for responding to public records requests and subpoenas. The Board is responsible for ensuring that its staff and agents have a working knowledge of Chapter 119, Florida Statutes. The Board agrees to appoint a public records coordinator for the purpose of ensuring that all public records matters are handled appropriately.
- b. **IF THE BOARD HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE BOARD'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT DEO'S CUSTODIAN OF PUBLIC RECORDS** by telephone at 850-245-7140, via e-mail at PRRequest@deo.myflorida.com, or by mail at Department of Economic Opportunity, Public Records Coordinator, 107 East Madison Street, Caldwell Building, Tallahassee, Florida 32399-

- c. The Board will have access to varying types of confidential information as a result of its performance under this Agreement. The Board will protect the confidentiality of any information to which it has access in accordance with applicable law. The Board will obtain guidance from DEO with respect to confidentiality matters. DEO will facilitate the Board's requests for guidance from other state agencies.
- d. Staff of the Board, its agents, contractors, subcontractors and any other entity performing services on behalf of the Board granted access to workforce information systems, including systems containing confidential information, must complete Exhibit B to this Agreement, "Individual Non-Disclosure and Confidentiality Certification Form," prior to accessing said workforce information systems. A copy of each completed form must be retained by the Board and made available to DEO upon request.
- e. Board requests for DEO data must come from Board executive staff to DEO. DEO will not accept data requests from the Board's contractors. DEO will only grant access to DEO-owned systems to staff of the Board, its agents, contractors, subcontractors and entities performing services on behalf of the Board.
- f. DEO may provide the Board access to RA information on an ongoing basis as a result of the Board's use of shared information systems and the provision of integrated services. Access to such information will typically be at no cost (any cost imposed by DEO will be reflected in a separate agreement between the Parties). Certain RA information is made confidential by section 443.1715, Florida Statutes, and 20 CFR 603.9(b)(1) requires the Board to agree to the following terms as a condition of accessing this information. DEO will immediately suspend or cease providing the Board access to RA information if DEO determines the Board is not in compliance with section 443.1715, Florida Statutes, 20 CFR 603, and the conditions set forth below. DEO may, in its sole discretion, provide access once DEO is satisfied that the Board has cured the deficiency. The Board shall:
 - i. use the information it receives only for purposes authorized by law and consistent with this Agreement;
 - ii. store the information, whether physically or electronically, in such a manner that is secure from unauthorized access;
 - iii. ensure the information is only accessible by authorized individuals that have an actual need to access the information for a legitimate and lawful purpose;
 - iv. ensure that any entity to which the Board further discloses the information complies with these terms;
 - v. not store the information on any portable storage media device (e.g., laptops, external hard drives, thumb drives, iPads, tablets, or smartphones, etc.);
 - vi. to the extent practicable, and considering the arrangement in place under this Agreement (shared information systems), destroy the information after the purpose for which it is disclosed is accomplished in accordance with 20 CFR 603.9(b)(1)(vi). However, the Board may not seek to delete information from DEO's information systems;
 - vii. to the extent practicable, and considering the arrangement in place under this Agreement, maintain a system sufficient to allow DEO to conduct an audit of transactions concerning the information;
 - viii. ensure all individuals obtaining access to the information are aware of the penalties established by section 443.1715, Florida Statutes, and acknowledges that all individuals have been so instructed through the execution of this Agreement; and
 - ix. allow DEO or its representatives access to conduct onsite inspections to ensure the Board's compliance with section 443.1715, Florida Statutes.
- g. The Board will immediately notify DEO of any breach of security, as defined by section 501.171, Florida Statutes, occurring in any operation under its control. If the breach of security concerns data belonging to DEO, DEO reserves the right to determine whether the provisions of section 501.171, Florida Statutes, apply. DEO will determine if notifications are necessary and, if so, the procedure for making, and the content included in, those notifications. The Board will provide the notifications if deemed necessary by DEO and will not provide said notifications without prior approval from DEO. DEO will not unreasonably withhold approval to send notifications and will make all decisions regarding said notifications as quickly as possible and consistent with the timelines in section 501.171, Florida Statutes. The Board is responsible for all fees and costs incurred due to a breach of security occurring in an operation, program, or physical setting under the Board's control, including,

but not limited to, the cost of sending breach notifications.

8. BACKGROUND SCREENINGS.

a. Level 1 Screenings.

- i. The Board will require and obtain a Level 1 background screening as a condition of employment or contract award for all Board, career center staff, contractors, and subcontractors. Additionally, the Board will require and obtain a Level 1 background screening for all individuals performing financial management activities. The Level 1 background screening must be conducted prior to employment or, for contract awards, prior to contractor's employees beginning work. The Level 1 background screening must be conducted at least every five years of consecutive employment, and upon re-employment in all circumstances (including assignment to a new or different contract for Board contractors). The Board will develop a policy for implementing background screenings.
- ii. The Level 1 background screenings are further explained in section 435.03, Florida Statutes. The Board will contract with an FDLE-approved provider to perform the Level 1 background screenings. The Board is responsible for all costs associated with obtaining the Level 1 background screening described in this section.
- iii. The Board will maintain its background screening material in a locked file cabinet or other secure location and store the material separately from any official employee personnel file. The Board will protect the confidentiality of the screening materials as required by law or contract.
- iv. The Board is responsible for maintaining a current list of all individuals for whom it has obtained a Level 1 background screening. The list must include, but need not be limited to, the name of the individual, the last four digits of the individual's social security number, the date the screening was completed, the date the results of the screening were reviewed, and the individual responsible for reviewing and approving the employment or access granted to the individual that was the subject of the screening.

b. Level 2 Screenings.

- i. The Board shall identify and disclose to DEO all Board staff positions that may be granted access to confidential data, including confidential data stored in the information systems used by workforce service providers to manage and report participant information. The Board must review all Board staff positions to determine if the positions should be designated as a position of Special Trust. Positions determined by DEO to be positions of special trust, and all employees placed or considered for placement in a Board Special Trust Position must undergo a Level 2 background screening as set forth more specifically below. For all Board Special Trust Positions, only a Level 2 background screening is necessary.
- ii. Level 2 background screenings are necessary to ensure individuals with criminal convictions or individuals that are under criminal investigation or become under criminal investigations related to theft, fraud, forgery, embezzlement, crimes of violence or any similar matters are not approved for access to confidential information. This includes individuals who plea or pleaded nolo contendere or no contest to such charges or offenses; negative information of this type may disqualify a person from being granted access to confidential information under this Agreement. The Level 2 background screenings must include a state and National Criminal Information Center check through the Federal Bureau of Investigations with no negative results to the above type of offenses/convictions.
- iii. For Board employees that have not had a Level 2 background screening within the past five years and who are currently employed in a Board Special Trust Position, the Board shall transmit a list of those employees in the method prescribed by DEO, in form and substance acceptable to DEO, within 45 days after request by DEO. DEO and the Board shall coordinate to establish a timeline to conduct all level 2 background screenings for current Board employees in a Board Special Trust Position. If the Board intends to place a new employee in a Board Special Trust Position, then the Board shall require that employee undergo a Level 2 background screening prior to any offer of employment. The Level 2 background screening must be conducted at least every five years of consecutive employment and upon re-employment in all circumstances.
- iv. State merit staff shall undergo Level 2 background screenings pursuant to the standards specified in section 435.04, Florida Statutes, as a pre-condition of employment. DEO will assist the Board in obtaining

state merit staff the required Level 2 background screenings pursuant to DEO's established processes and procedures. The Level 2 background screening must be conducted at least every five years of consecutive employment and upon re-employment in all circumstances.

9. LOCAL PLAN AND ASSURANCES.

- a. The Board must submit and receive approval of local plans which outline the Board's delivery and administration of all workforce services delivered within its LWDA. The plan must identify and describe the policies, procedures, and local activities that are carried out in the LWDA consistent with the state plan and must contain all content required by DEO. Further, the plan must describe the Board's methods for ensuring the needs of workers and youth, and individuals with barriers to employment, including individuals with disabilities, are addressed in the provision of necessary and appropriate access to services, including access to technology and materials, made available through the one-stop delivery system. The Board will continue to develop and update its local plan in accordance with applicable provisions of law and as directed by DEO or the State Board.
- b. Executive Order 11-116, signed May 21, 2011, by the Governor of Florida, requires DEO to use the U.S. Department of Homeland Security's E-Verify system. The Board shall utilize the E-Verify system to verify the employment eligibility of all new employees after the Effective Date. After the Effective Date, and for all current employees, prior to any promotion or during that employee's Level 1 or Level 2 background rescreening, the Board shall use the E-Verify system.

10. PROCUREMENT.

- a. If the Board enters into a contract in the amount of \$1,000,000 or more, in accordance with the requirements of section 287.135, Florida Statutes, the Board will obtain a certification that the contractor is not listed on the Scrutinized Companies that Boycott Israel List or is engaged in a boycott of Israel, the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, engaged in business operations in Cuba or Syria, or meets the conditions for exemption as provided in section 287.135(4), Florida Statutes. These lists are created pursuant to sections 215.4725 and 215.473, Florida Statutes. The Board certifies that it is in compliance with this provision. Upon request, DEO will provide a form the Board may utilize in connection with any procurement for the purposes of ensuring compliance with this paragraph. If federal law ceases to authorize the states to adopt and enforce the contracting prohibition described in this paragraph, this paragraph will be null and void.
- b. If the Board is affiliated with a local government entity, it will ensure compliance with section 287.133(2)(a), Florida Statutes. Any person or affiliate, as defined by that section of the Florida Statutes, placed on the convicted vendor list following a conviction for a public entity crime may not submit a response to any solicitation for the provision of goods or services to the Board. The Board will not accept any solicitation response from such an entity and will not award a contract in excess of \$35,000 for a period of 36 months from the date an entity is placed on the convicted vendor list. Upon request, DEO will provide an attestation form the Board may utilize in connection with any procurement for the purposes of ensuring compliance with this paragraph.
- c. The Board will not accept responses to procurement solicitations from, or award a contract to, any entity that appears on the discriminatory vendor list described in section 287.134, Florida Statutes. DEO recommends the Board include a clause in all procurement solicitations and contracts that the respondent or contractor is not on the state's discriminatory vendor list.
- d. DEO encourages the Board to seek goods and services through the Prison Rehabilitative Industries and Diversified Enterprises, Inc. (PRIDE), and from RESPECT of Florida (products and services produced by individuals with disabilities).
- e. The Board will obtain prior written approval from DEO prior to purchasing any information technology resource or conducting any activity that will, in any way, access DEO data and DEO-owned systems. To ensure statewide efficiency of funding, prior approval from DEO must also be obtained prior to requesting any changes or enhancements to Employ Florida.

- f. The Board shall comply with the procurement standards in 2 CFR 200.318 - 200.326 when procuring property and services under this Agreement. The Board shall impose its obligations under this Agreement on its contractors, specifically or by reference, so that such obligations will be binding upon each of its contractors. The Board shall maintain oversight of all activities under this Agreement and shall ensure that for any procured contract or agreement, its contractors perform according to the terms and conditions of the procured contracts or agreements, and the terms and conditions of this Agreement.
- g. The Board may not purchase memberships or enter into any agreements with the Florida Workforce Development Association with funds provided by DEO. The Board may pay for registration dues in conjunction with training, including but not limited to the annual Summit provided by the Florida Workforce Development Association.
- h. Funds expended for events must be compliant with 2 CFR 200.421, and DEO's Guidance on Use of Funds for the Purchase of Outreach/Informational Items (FG-OGM-84). Documentation must be retained to support the cost of the funds expended and must demonstrate that the costs are reasonable and necessary to connect individuals to employment and training services.

11. COMPENSATION AND TRAVEL.

- a. Funds provided by DEO may not be used to fund the salary, bonus, or incentive of any employee in excess of Federal Executive Level II, regardless of the funding source.
- b. No changes to compensation for executive staff of the Board are allowed without documented Board approval and must be in alignment with local policies and procedures. The Board shall ensure that all bonuses, pay raises, and benefits are reasonable and necessary for the successful performance of the award and are a prudent use of federal funds.
- c. The Board shall comply with section 445.007(10), Florida Statutes, and the following per diem and travel expense provisions, consistent with section 112.061, Florida Statutes:
 - i. Board members may receive reimbursement for per diem and travel expenses pursuant to section 112.061, Florida Statutes.
 - ii. Lodging expenses for an employee of the Board may not exceed the daily limit for that of employees of the State of Florida, excluding taxes and fees, unless the Board is participating in a negotiated group rate discount or the Board obtains and maintains documentation of at least three comparable alternatives demonstrating that such lodging at the required rate is not available. However, an employee of the Board may expend his or her own funds for any lodging expenses over the limit for employees of the State of Florida.
 - iii. The Board shall ensure that travel and expense reimbursements made to vendors and subrecipients are in accordance with the Board's travel and expense policy. The Board's travel and expense policy must ensure that vendor reimbursements are made at the lowest possible cost necessary to ensure a reasonable level of service, comfort, and security.

12. BOARD GOVERNANCE, RESPONSIBILITIES, AND TRANSPARENCY.

- a. The Board shall ensure that the local area designation complies with the requirements outlined in the federal law (WIOA) and applicable state policy.
- b. The following information must be posted on the Board's website in a manner easily accessed by the public:
 - i. Notice of all Board meetings at least seven days before the meeting is to occur. Notice of special board meetings must be posted at least 72 hours before the meeting is to occur.
 - ii. Employee positions and salary information for each position (including any benefits and performance bonuses).
 - iii. A plain language version of any contract that is estimated to exceed \$35,000 with a private entity,

- municipality, city, town, or vendor of services, supplies, or programs, including marketing, or for the purchase or lease or use of lands, facilities, or properties.
 - iv. A list of all Board members, company or entity that the Board member is employed by or owns, and their terms of service.
 - v. Interlocal agreement(s), as applicable
 - vi. Single Audit for the last two years.
 - vii. Board meeting minutes within 15 days of Board approval.
 - viii. All active agreements with another board that delegates partial or complete responsibility for any duties the Board is expected, required, or mandated to perform under this Agreement or WIOA, even if the cost is not expected to exceed \$35,000.
- c. The Board shall comply with the requirements of 2 CFR 25 Universal Identifier and System for Award Management (SAM). The Subrecipient must have an active registration in SAM in accordance with 2 CFR part 25, appendix A, and must have a Data Universal Numbering System number. The Subrecipient must also comply with provisions of the Federal Funding Accountability and Transparency Act, which includes requirements on executive compensation and 2 CFR 170 Reporting Subaward and Executive Compensation Information.
- d. In compliance with sections 39.201 and 415.1034, Florida Statutes, if the Board, its agents, employees, contractors, subcontractors or any other entity performing the services on behalf of the Board, knows or has reasonable cause to suspect that a child, aged person, or disabled adult is or has been abused, neglected, or exploited, the Board agrees to immediately report such knowledge or suspicion to the Florida Abuse Hotline by calling 1-800-96ABUSE, or via the web reporting option at <http://www.dcf.state.fl.us/abuse/report>, or via fax at 1-800-914-0004.
- e. Consistent with 2 CFR 200.113, the Board must, within one business day of discovery, disclose any violation of federal criminal law involving fraud, bribery, or gratuity violations potentially affecting the federal award. Additionally, the Board shall disclose any other on-going civil or criminal litigation, investigation, arbitration, or administrative proceeding upon execution of this Agreement.
- f. For all funds provided by DEO, when issuing statements, press releases, requests for proposals, bid solicitations and other documents describing projects or programs funded in whole or in part with federal money, the Subrecipient shall clearly state (i) the percentage of the total costs of the program or project which will be financed with federal money; (ii) the dollar amount of federal funds for the project or program; and (iii) the percentage and dollar amount of the total costs of the project or program that will be financed by non-governmental sources. Consolidated Appropriations Act of 2018, Pub. L. No. 115-141, 132 Stat. 348, div. H, Title V, Sec. 505 (Mar. 23, 2018).
- g. In compliance with section 286.25, Florida Statutes, the Board will ensure any nongovernmental organization which sponsors a program financed, in whole or in part, with funds provided under this Agreement will, in publicizing, advertising, or describing the sponsorship of the program, state: "Sponsored by (entities name) and the State of Florida, Department of Economic Opportunity." If the sponsorship reference is in written form, the words "State of Florida, Department of Economic Opportunity" will appear in the same size letters or type as the name of the entity.

13. ETHICS.

- a. The Board shall adopt an employee ethics code modeled after the provisions of Chapter 112, Florida Statutes, and shall name a Chief Ethics Officer. The Officer shall be responsible for the periodic training of Board staff and for maintaining the Ethics Code and for, which addresses:
 - i. The acceptance of gifts;
 - ii. Self-dealing;
 - iii. A prohibition on unauthorized compensation;
 - iv. Conflicting employment or contractual relationships;
 - v. Appropriate disclosure and use of information; and

vi. Nepotism.

- b. The Board will adopt and abide by a conflict of interest policy that ensures compliance with state and federal law and applicable State Board and DEO policies. The Board will make reasonable modifications to the policy if requested by DEO. The Board must ensure that adequate firewalls are in place to prevent actual or perceived conflicts of interest, poor internal controls, or the appearance of impropriety.
- c. The Board must ensure grievance procedures and Equal Opportunity representation, consistent with 20 CFR 683.285, is available and made known to staff, participants, and other interested parties in the local workforce development system. The Board must also adopt a whistle blower policy that facilitates the reporting of violations of policy or law without fear of retaliation.
- d. The Board will comply with sections 11.062 and 216.347, Florida Statutes. The Board will not, in connection with this or any other agreement with the state, directly or indirectly: (1) offer, confer, or agree to confer any pecuniary benefit on anyone as consideration for any state officer or employee's decision, opinion, recommendation, vote, or other exercise of discretion, or violation of a known legal duty; or (2) offer, give, or agree to give to anyone any gratuity for the benefit of, or at the direction or request of, any state officer or employee. For purposes of this paragraph, "gratuity" means any payment of more than a nominal monetary value in the form of cash, travel, entertainment, gifts, meals, lodging, loans, subscriptions, advances, deposits of money, services, employment, or contracts of any kind. DEO encourages the Board to contact the Florida Commission on Ethics for any questions regarding its compliance with this paragraph.
- e. Prohibition on Lobbying. The Subrecipient shall not, directly or indirectly, expend either state or federal funds either (i) for the purpose of lobbying any branch, unit, or instrumentality of the state or federal governments, or (ii) for any otherwise allowable purpose which could result in unauthorized lobbying.

14. LOCAL BOARD COMPOSITION, BOARD MEMBER SELECTION AND TRAINING.

- a. The Board must ensure that the local workforce board composition is compliant with all federal and state laws, polices, procedures, and rules.
- b. The Board, in consultation with the CLEO, must develop and implement clear processes and procedures for recruiting, vetting, and nominating Board members and documenting their qualifications in alignment with the requirements of WIOA, and compliant with all federal and state laws, polices, procedures, and rules.
- c. The Board shall prohibit any Board staff from serving as members of a committee or subcommittee of the Board.
- d. The Board shall ensure Board members complete mandatory Board orientation and training. The Board shall take all reasonable steps necessary to encourage attendance by the CLEO at Board orientation and training. The Board shall retain and provide to DEO upon request the dates of training and sign-in sheets (or other evidence of attendance) of training participants.

15. RELATED PARTIES. The purpose of this section is to help DEO ensure transparency and accountability, to prevent impropriety or the appearance of impropriety in public business, and to limit the possibility of the improper expenditure of state or federal funds.

- a. Related Parties. For purposes of this Agreement, "Related Party" includes any: Board member; Board employee or staff; relative of any Board member or employee or staff; any organization represented by or employing a Board member or employee or staff; any organization, the board of directors of which a Board member or employee or staff holds a board position; or any vendor with which a Board member has a relationship.
- b. Related Party Contract. For purposes of this Agreement, "Related Party Contract" means any relationship, transaction, or expenditure, contractual in nature, which results in or could result in an expenditure of state or federal funds by the Board with a Related Party. The term "Related Party Contract" does not include retail purchases made in the ordinary course of business or payments for utility services.

- c. Related Parties Compliance. The Board shall comply with section 445.007(11), Florida Statutes. The Board and its employees must annually disclose to DEO any conflicts of interest that may arise during the upcoming year, or that actually arose in the current year and were not previously disclosed.
 - i. Prior to entering into any Related Party Contract with any Related Party, the proposed Related Party Contract must be brought before the Board for consideration and approval. The Board shall ensure that:
 - (i) the Board member or employee with the conflict removes himself or herself from the room prior to any discussions at any meeting, including subcommittee meetings, involving the contract; (ii) the Board member or employee with the conflict is not physically present during the voting; and (iii) the Board member with the conflict abstains from any vote regarding the Related Party Contract.
 - ii. If the disclosure was not made prior to the meeting because the conflict was unknown prior to the meeting, the Board shall ensure that disclosure is made at the next possible meeting after knowledge of the conflict becomes available.
- d. Completion of Forms. For each Related Party Contract, the Board must ensure that the forms attached hereto as Exhibits C and D are completed, dated, executed, and certified prior to execution of the contract or incurring of expenditures for the current fiscal year. Exhibits C and D must be submitted at or before the Board meeting in which the vote is to take place for board members and employees of the board who have any conflict of interest with the contracting vendor. For conflicts unknown at the time of entering into the Related Party Contract, the Board shall ensure that completed forms of Exhibits C and D are filed within 15 days after the disclosure with the person responsible for recording the minutes of the meeting. The disclosure shall be incorporated into the minutes of the meeting at which the oral disclosure was made. If the Related Party Contract was approved by the Board in the current or previous fiscal year and the Board intends to continue the Related Party Contract, Exhibits C and D must be submitted annually to DEO for approval prior to the beginning of the next fiscal year.
- e. Contracts \$25,000 or Greater. DEO may disapprove, in its sole discretion, any contract for the Board's failure to submit any required document or form as required by this section. Prior to execution of any contract equal to or greater than \$25,000, the Board must approve and electronically submit the documentation set forth below, along with completed copies of the forms attached hereto as Exhibits C and D, to WorkforceContract.Review@deo.myflorida.com.
- f. Contracts Less Than \$25,000. Within 30 days after execution of any contract less than \$25,000, the Board must approve and electronically submit a certified board membership roster listing all members on the Board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting. For those in attendance, the affirmative and negative votes and abstentions for each member, along with completed copies of the forms attached hereto as Exhibits C and D, must be submitted to WorkforceContract.Review@deo.myflorida.com.

16. ADDITIONAL PROVISIONS.

- a. This Agreement will be construed, performed, and enforced in all respects in accordance with the laws, rules, and regulations of the State of Florida. Each Party will perform its obligations herein in accordance with the terms and conditions of the Agreement. The exclusive venue of any legal or equitable action that arises out of or relates to this Agreement will be either the Division of Administrative Hearings or the appropriate state court in Leon County, Florida. In any such action, the Parties waive any right to jury trial.
- b. Should any term of this Agreement conflict with any applicable law, rule, or regulation, the law, rule, or regulation will control over the provisions of this Agreement.
- c. The Board is fully liable for its actions, and the actions of the Board's officers, agents, contractors and employees. The Board will indemnify, defend, and hold harmless the state, the State Board, and DEO, and their respective officers, agents, and employees from any suit, action, damage, judgment, and costs of every name and description, including attorney's fees, arising from or relating to any action of the Board.

- d. If any provision of this Agreement, whether in whole or in part, is held to be void or unenforceable by a Court of competent jurisdiction, that provision will be enforced only to the extent that it is not in violation of law or is not otherwise unenforceable, and all other provisions will remain in full force and effect.
- e. This Agreement may be executed in counterparts, each of which will be an original and all of which will constitute but one and the same instrument.
- f. Any amendment or modification to the terms of this Agreement must be in written form signed by both Parties.
- g. Annually before July 1 of each state fiscal year, the Board shall adopt a schedule of operations for the upcoming state fiscal year. Such schedule of operations shall include, but is not limited to, daily hours of operation of one-stop operators, and a holiday closure schedule which adopts either the federal, state, or appropriate county holiday schedule. If the Board has a career center that is affiliated with a college or university, the college or university schedule may be adopted for those centers. The proposed schedule must be approved by the Board and posted on the Board's website in a conspicuous, easily-accessible manner. The Board must give prior approval to any deviations from the schedule, except in emergency or reasonably unforeseeable circumstances (e.g., an order of the President or Governor, total loss of facilities from a catastrophic natural or man-made disaster, etc.). If emergency circumstances exist which result or could foreseeably result in a shutdown, the Board shall ensure that DEO and the State Board are informed within 48 hours of such shutdown or potential shutdown.

17. SERVICES TO INDIVIDUALS WITH DISABILITIES. The Board shall designate at least one staff member for the LWDA to promote and develop employment opportunities for individuals with disabilities to ensure that job counseling and placement efforts are made for such individuals.

18. SERVICES TO INDIVIDUALS WITH LIMITED ENGLISH PROFICIENCY. The Board shall establish a policy and procedure for providing free language services to customers that have a limited ability to read and/or speak the English language.

19. RESPONSE TO CUSTOMER SERVICE COMPLAINTS. DEO will forward any customer concerns or complaints about the Board received directly or forwarded from the Governor's or legislative offices, to the Board staff for review. Board staff will investigate the complaint in a timely manner, take appropriate action, and report the action in writing to DEO so that the complaint can be closed.

20. LIAISONS.

- a. The Parties acknowledge they have a close working relationship and that neither Party desires an overly-bureaucratic or formal communication structure. To that effect, the Parties may communicate with each other through any appropriate liaison, as context may dictate.
- b. DEO's formal liaison for purposes of this Agreement is Caroline ("Tisha") Womack. Ms. Womack can be reached at Caroline.Womack@deo.myflorida.com or (850) 245-7126. All communication for which the Parties' course of dealing does reveal a more appropriate liaison will be directed to Ms. Womack, or other designee.
- c. The Board's formal liaison for purposes of this Agreement is Rusty Skinner. Rusty Skinner can be reached at rskinner@careersourceclm.com, or (352) 861-1650. All communication for which the Parties' course of dealing does reveal a more appropriate liaison will be directed to Rusty Skinner, or other designee.
- d. If different liaisons are designated by either Party after the execution of this Agreement, notice of the name, telephone number, and email address of the new liaison shall be provided in writing to the other Party and said notification shall be attached to this Agreement.

21. REQUIRED LOCAL POSITIONS. Appointed individuals may serve in more than one capacity or perform other job duties and functions, as appropriate, to the extent that no conflict of interest arises or may arise. The Board shall appoint:

- a. A Regional Security Officer.
- b. A custodian for purchased property and equipment.
- c. A personnel liaison (must be a DEO merit staff member).
- d. A public records coordinator.
- e. An Equal Opportunity Officer, consistent with 29 CFR part 38.
- f. An Ethics Officer

22. CONSTRUCTION; INTERPRETATION. The title of and the section and paragraph headings in this Agreement are for convenience of reference only and shall not govern or affect the interpretation of any of the terms or provisions of this Agreement. The term “this Agreement” means this Agreement together with all Exhibits hereto, as the same may from time to time be amended, modified, supplemented, or restated in accordance with the terms hereof. The use in this Agreement of the term “including” and other words of similar import mean “including, without limitation” and where specific language is used to clarify by example a general statement contained herein, such specific language shall not be deemed to modify, limit, or restrict in any manner the construction of the general statement to which it relates. The word “or” is not exclusive and the words “herein,” “hereof,” “hereunder,” and other words of similar import refer to this Agreement as a whole, including any Exhibits, and not to any particular section, subsection, paragraph, subparagraph, or clause contained in this Agreement. The use herein of terms importing the singular shall also include the plural, and vice versa. The reference to an agreement, instrument, or other document means such agreement, instrument, or other document as amended, supplemented, and modified from time to time to the extent permitted by the provisions thereof and the reference to a statute means such statute as amended from time to time and includes any successor legislation thereto and any regulations promulgated thereunder. All references to “\$” shall mean United States dollars. The recitals of this Agreement are incorporated herein by reference and shall apply to the terms and provisions of this Agreement and the Parties. Time is of the essence with respect to the performance of all obligations under this Agreement. The Parties have participated jointly in the negotiation and drafting of this Agreement. If an ambiguity or question of intent or interpretation arises, this Agreement shall be construed as if drafted jointly by the Parties, and no presumption or burden of proof shall arise favoring or disfavoring any Party by virtue of the authorship of any of the provisions of this Agreement.

23. PRESERVATION OF REMEDIES; SEVERABILITY; RIGHT TO SET-OFF. No delay or omission to exercise any right, power, or remedy accruing to either Party upon breach or default by either Party under this Agreement will impair any such right, power, or remedy of either Party nor will such delay or omission be construed as a waiver of any breach or default or any similar breach or default. If any term or provision of this Agreement is found to be illegal, invalid, or unenforceable, such term or provision will be deemed stricken, and the remainder of this Agreement will remain in full force and effect. DEO and the State shall have all of its common law, equitable and statutory rights of set-off, including, without limitation, the State’s option to withhold for the purposes of set-off any moneys due to the Board under this Agreement up to any amounts due and owing to DEO with respect to this Agreement, any other contract with any state department or agency, including any contract for a term commencing prior to the term of this Agreement, plus any amounts due and owing to the State for any other reason including, without limitation, tax delinquencies or monetary penalties relative thereto. The State shall exercise its set-off rights in accordance with normal state practices including, in cases of set-off pursuant to an audit, the finalization of such audit by the state or its representatives.

24. ENTIRE AGREEMENT; AMENDMENT; WAIVER. This Agreement embodies the entire agreement of the Parties with respect to the subject matter hereof. There are no provisions, terms, conditions, or obligations other than those contained in this Agreement, and this Agreement supersedes all previous communications, representations, or agreements, either verbal or written, between the Parties. No amendment will be effective unless reduced to writing and signed by an authorized officer of the Board and the authorized agent of DEO. No waiver by any Party of any of the provisions hereof shall be effective unless explicitly set forth in writing and signed by the Party so waiving. No waiver by any Party shall operate or be construed as a waiver in respect of any failure, breach or default not expressly identified by such written waiver, whether of a similar or different character, and whether occurring before or after that waiver. No failure to exercise, or delay in exercising, any right, remedy, power, or privilege arising from this Agreement shall operate or be construed as a waiver thereof; nor shall any single or partial exercise of any right, remedy, power, or privilege hereunder preclude any other or further exercise thereof or the exercise of any other right, remedy, power, or privilege.

IN WITNESS HEREOF, by signature below, the Parties acknowledge they have read this Agreement and the attachments hereto, understand each section and paragraph, agreed to abide by the terms of this Agreement, and intend that this Agreement become effective as described above.

**DEPARTMENT OF ECONOMIC
OPPORTUNITY**

**[LWDB Chairperson or person with authority to
sign on behalf of LWDB (verify authority if not
chairperson)]**

By: _____
Signature

Printed Name: Ken Lawson

Title: Executive Director

Date: _____

By: _____
Signature

Printed Name: [insert name]

Title: [insert title]

Date: _____

Acknowledged by the Chief Local Elected Official:

By: _____
Signature

Printed Name: [insert name]

Title: [insert title]

Date: _____

EXHIBIT A

AUDIT REQUIREMENTS

The administration of resources awarded by the Department of Economic Opportunity (Department or DEO) to the recipient may be subject to audits and/or monitoring by DEO as described in the Agreement and as described further in this Exhibit. No provision of the Agreement is intended to limit the terms of this Exhibit, and no provision in this Exhibit is intended to limit the terms of the Agreement. The term “contract,” as used throughout this Exhibit, means the Agreement, and any individual subaward granted to the recipient through a Notice of Fund Availability (NFA).

MONITORING. In addition to reviews of audits conducted in accordance with 2 CFR 200, Subpart F - Audit Requirements, and section 215.97, Florida Statutes (F.S.), as revised (see AUDITS below), monitoring procedures may include, but not be limited to, on-site visits by DEO staff, limited scope audits as defined by 2 CFR §200.425, or other procedures. By entering into this agreement, the recipient agrees to comply and cooperate with any monitoring procedures or processes deemed appropriate by DEO. In the event DEO determines that a limited scope audit of the recipient is appropriate, the recipient agrees to comply with any additional instructions provided by DEO staff to the recipient regarding such audit. The recipient further agrees to comply and cooperate with any inspections, reviews, investigations, or audits deemed necessary by the Chief Financial Officer (CFO) or Auditor General.

AUDITS.

PART I: FEDERALLY FUNDED. This part is applicable if the subrecipient is a state or local government or a nonprofit organization as defined in 2 CFR §200.90, §200.64, and §200.70.

1. A recipient that expends \$750,000 or more in federal awards in its fiscal year must have a single or program-specific audit conducted in accordance with the provisions of 2 CFR 200, Subpart F - Audit Requirements. EXHIBIT A to this form lists the federal resources awarded through DEO by this agreement. In determining the federal awards expended in its fiscal year, the subrecipient shall consider all sources of federal awards, including federal resources received from DEO. The determination of amounts of federal awards expended should be in accordance with the guidelines established in 2 CFR §§200.502-503. An audit of the subrecipient conducted by the Auditor General in accordance with the provisions of 2 CFR §200.514 will meet the requirements of this Part.
2. For the audit requirements addressed in Part I, paragraph 1, the subrecipient shall fulfill the requirements relative to auditee responsibilities as provided in 2 CFR §200.508-512.
3. A recipient that expends less than \$750,000 in federal awards in its fiscal year is not required to have an audit conducted in accordance with the provisions of 2 CFR 200, Subpart F - Audit Requirements. If the subrecipient expends less than \$750,000 in federal awards in its fiscal year and elects to have an audit conducted in accordance with the provisions of 2 CFR 200, Subpart F - Audit Requirements, the cost of the audit must be paid from non-federal resources (i.e., the cost of such an audit must be paid from recipient resources obtained from other than federal entities).

PART II: STATE FUNDED. This part is applicable if the recipient is a nonstate entity as defined by Section 215.97(2), Florida Statutes.

1. In the event that the recipient expends a total amount of state financial assistance equal to or in excess of \$750,000 in any fiscal year of such recipient (for fiscal years ending June 30, 2017, and thereafter), the recipient must have a state single or project-specific audit for such fiscal year in accordance with section 215.97, F.S.; Rule Chapter 69I-5, F.A.C., State Financial Assistance; and Chapters 10.550 (local governmental entities) and 10.650 (nonprofit and for-profit organizations), Rules of the Auditor General. EXHIBIT A to this form lists the state financial assistance awarded through DEO by this agreement. In determining the state financial assistance expended in its fiscal year, the recipient shall consider all sources of state financial assistance, including state financial assistance received from DEO, other state agencies, and other nonstate entities. State financial assistance does not include federal direct or pass-through awards and resources received by a nonstate entity for federal program matching requirements.
2. For the audit requirements addressed in Part II, paragraph 1, the recipient shall ensure that the audit complies with the requirements of section 215.97(8), F.S. This includes submission of a financial reporting package as defined by section 215.97(2), F.S., and Chapters 10.550 (local governmental entities) and 10.650 (nonprofit

and for-profit organizations), Rules of the Auditor General.

3. If the recipient expends less than \$750,000 in state financial assistance in its fiscal year (for fiscal years ending June 30, 2017, and thereafter), an audit conducted in accordance with the provisions of section 215.97, F.S., is not required. If the recipient expends less than \$750,000 in state financial assistance in its fiscal year and elects to have an audit conducted in accordance with the provisions of section 215.97, F.S., the cost of the audit must be paid from the nonstate entity's resources (i.e., the cost of such an audit must be paid from the recipient's resources obtained from other than state entities).

PART III: OTHER AUDIT REQUIREMENTS. AUDITOR WORK PAPERS ON INTERNAL CONTROLS

The Board will obtain the internal control work papers from the auditor(s) performing its annual independent financial statement audit. The Board will keep these work papers onsite as part of their financial records and will make these records available for review by DEO upon request. The Board further agrees that, upon request, DEO will also be provided other audit work papers as needed.

PART IV: REPORT SUBMISSION.

1. Copies of reporting packages for audits conducted in accordance with 2 CFR 200, Subpart F - Audit Requirements, and required by Part I of this form shall be submitted, when required by 2 CFR §200.512, by or on behalf of the recipient directly to the Federal Audit Clearinghouse (FAC) as provided in 2 CFR §200.36 and §200.512.

The FAC's website provides a data entry system and required forms for submitting the single audit reporting package. Updates to the location of the FAC and data entry system may be found at the OMB website.

2. Copies of financial reporting packages required by Part II of this form shall be submitted by or on behalf of the recipient directly to each of the following:

- a. DEO at each of the following addresses:

Electronic copies (preferred):

or

Paper (hard copy): Audit@deo.myflorida.com
Department Economic Opportunity
MSC #75, Caldwell Building 107 East Madison
Street Tallahassee, FL 32399-4126

- b. The Auditor General's Office at the following address: Auditor General

Local Government Audits/342 Claude Pepper Building, Room 401 111 West Madison Street
Tallahassee, Florida 32399-1450

The Auditor General's website (<https://flauditor.gov/>) provides instructions for filing an electronic copy of a financial reporting package.

3. Copies of reports or the management letter required by Part III of this form shall be submitted by or on behalf of the recipient directly to:

Electronic copies (preferred):
Audit@deo.myflorida.com

or

Paper (hard copy):
Department Economic Opportunity
MSC #75, Caldwell Building 107 East Madison
Street Tallahassee, FL. 32399-4126

4. Any reports, management letters, or other information required to be submitted DEO pursuant to this agreement shall be submitted timely in accordance with 2 CFR §200.512, section 215.97, F.S., and Chapters 10.550 (local governmental entities) and 10.650 (nonprofit and for-profit organizations), Rules of the Auditor General, as applicable.

5. Recipients, when submitting financial reporting packages to DEO for audits done in accordance with 2 CFR 200, Subpart F - Audit Requirements, or Chapters 10.550 (local governmental entities) and 10.650 (nonprofit and for-profit organizations), Rules of the Auditor General, should indicate the date that the reporting package

was delivered to the recipient in correspondence accompanying the reporting package.

PART V: RECORD RETENTION. The recipient shall retain sufficient records demonstrating its compliance with the terms of this Agreement for a period of five (5) years from the date the audit report is issued, or five (5) state fiscal years after all reporting requirements are satisfied and final payments have been received, whichever period is longer, and shall allow DEO, or its designee, CFO, or Auditor General access to such records upon request. The recipient shall ensure that audit working papers are made available to DEO, or its designee, CFO, or Auditor General upon request for a period of five (5) years from the date the audit report is issued, unless extended in writing by DEO. In addition, if any litigation, claim, negotiation, audit, or other action involving the records has been started prior to the expiration of the controlling period as identified above, the records shall be retained until completion of the action and resolution of all issues which arise from it, or until the end of the controlling period as identified above, whichever is longer.

- Remainder of Page Intentionally Left Blank -

**FEDERAL RESOURCES AWARDED TO THE RECIPIENT PURSUANT TO THIS AGREEMENT
CONSIST OF THE FOLLOWING:**

1. *The specific award information required to be set forth herein will be contained in one or more NFAs issued by DEO pursuant to the terms of the Agreement, which are incorporated herein by reference.*

**COMPLIANCE REQUIREMENTS APPLICABLE TO FEDERAL RESOURCES AWARDED
PURSUANT TO THIS AGREEMENT ARE AS FOLLOWS:**

1. *All requirements of this Agreement*

**STATE RESOURCES AWARDED TO THE RECIPIENT PURSUANT TO THIS AGREEMENT CONSIST
OF THE FOLLOWING:**

SUBJECT TO SECTION 215.97, FLORIDA STATUTES:

1. *The specific award information required to be set forth herein will be contained in one or more NFAs issued by DEO pursuant to the terms of the Agreement, which are incorporated herein by reference.*

**COMPLIANCE REQUIREMENTS APPLICABLE TO STATE RESOURCES AWARDED PURSUANT
TO THIS AGREEMENT ARE AS FOLLOWS:**

1. *All requirements of this Agreement.*

EXHIBIT B

Individual Non-Disclosure and Confidentiality Certification Form

I understand that I will be exposed to certain confidential information for the limited purpose of performing my job. I understand that confidential records may include names (or other personally identifiable information), social security numbers, wage information, reemployment assistance information, employment information, and public assistance information. I understand that this information is confidential and may not be disclosed to others. Prior to receiving access to such information, and any information systems containing such information, I acknowledge and agree to abide by the following standards:

1. I will comply with all security requirements imposed as a condition of use for any system(s) to which I may be granted access.
2. I will use access to the system(s) only for purposes authorized by law within the course and scope of my employment to secure information to conduct program business.
3. I will not disclose my user identification, password, or other information needed to access the system(s) to any party nor shall I give any other individual access to secured information contained within the system(s).
4. If I become aware that any unauthorized individual has or may have obtained access to my user identification, password, or other information needed to access system(s) to which I have been granted access, I will immediately notify the Board's Regional Security Officer.
5. I will store any physical documents containing confidential information in a place that is secure from access by unauthorized persons.
6. I will store and process information maintained in electronic format, such as magnetic tapes, discs, or external drives in such a way that unauthorized persons cannot obtain the information by any means.
7. I will undertake precautions to ensure that only authorized personnel are given access to disclosed information stored in computer system(s).
8. I will not share with anyone any other information regarding access to the system(s) unless I am specifically authorized to do so by the Department of Economic Opportunity.
9. I will not access or request access to any social security numbers, personal information, wage information, employer information, reemployment assistance information, or employment data unless such access is necessary for the performance of my legitimate business duties.
10. I will not disclose any individual data to any parties who are not authorized to receive such data except in the form of reports containing only aggregate statistical information compiled in such a manner that it cannot be used to identify the individual(s) or employers involved.
11. I will not access or divulge information about any personal associates, including relatives, friends, significant others, co-workers, or anyone with whom I reside. I will not provide services to these individuals and will, instead, refer such individuals to other qualified service providers.
12. I will retain the confidential data only for that period of time necessary to perform my public duties. Thereafter, I will either arrange for the retention of such information consistent with federal or state record retention requirements or destroy such data, and any copies made, after the purpose for which the information is disclosed is served. I will do this in such a way so as to prevent the information from being reconstructed,

copied, or used by any means. However, I will not destroy or delete information from information system(s) when such destruction or deletion is outside the scope of my authority.

13. I understand that it is misdemeanor of the second degree to disclose confidential reemployment assistance information to unauthorized persons. I further understand that the Department of Economic Opportunity has process and procedures in place to detect unauthorized access to such information. I understand that it is the practice of the Department of Economic Opportunity to prosecute violations of to the fullest extent of the law.

14. I certify and affirm that I have either (1) received training on the confidential nature of the data to which I am being granted access to, the safeguards required for access privileges, and the penalties involved for any violations; or (2) have received written standards and instructions in the handling of confidential data from my employer or the Department of Economic Opportunity. I will comply with all confidentiality safeguards contained in such training, written standards, or instructions, including but not limited to, the following: a) protecting the confidentiality of my user identification and password; b) securing computer equipment, disks, and offices in which confidential data may be kept; and c) following procedures for the timely destruction or deletion of confidential data.

15. I understand that if I violate any of the confidentiality provisions set forth in the written standards, training, and/or instructions I have received, my user privileges may be immediately suspended or terminated. I also understand that applicable state and/or federal law may provide that any individual who discloses confidential information in violation of any provision of that section may be subject to criminal prosecution and if found guilty could be fined, be subject to imprisonment and dismissal from employment. I have been instructed that if I should violate the provisions of the law, I may receive one or more of these penalties.

Should I have any questions concerning the handling or disclosure of confidential information, I shall immediately ask my supervisor, regional security officer, or One-Stop Operator for guidance and comply with their instructions.

Employee Signature: _____ Date: _____

Print Employee Name: _____

Address: _____

Work Telephone: _____

E-Mail: _____

EXHIBIT C
CONTRACT INFORMATION FORM

This form is to disclose a conflict or potential conflict and to seek approval of a contract involving a conflict or potential conflict of interest of board members or employees. All requested information is required. Failure to provide complete information may result in disapproval of the contract.

I, _____, hereby certify the following information regarding a contract that was approved by a two-thirds (2/3) vote of a quorum of CareerSource _____ and will be executed and implemented immediately after receiving the State's approval in compliance with section 445.007(11), Florida Statutes.

Identification of all parties to the contract: _____

Contractor Name & Address: _____

Contractor Contact Phone Number: _____

Contract Number or Other Identifying Information, if any: _____

Contract Term: _____

Value of the Contract/Renewal/Extension: _____

Description of goods and/or services to be procured: _____

Name of board member or employee whose conflict of interest required the board's approval of the contract by two-thirds (2/3) vote: _____

The nature of the conflicting interest in the contract: _____

The board member or employee with the conflict of interest _____ did _____ did not (check one) attend the meeting(s), including subcommittee meetings, at which the board discussed or voted to approve the contract.

If the board member or employee with the conflict of interest attended the meeting(s), including subcommittee meetings, at which the board discussed or voted on the contract, the board member or employee was not present during the discussion or vote.

I further attest that the following is being provided with this form:

- A certified board membership roster listing all members on the board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting(s), including subcommittee meetings, and for those in attendance, the affirmative and negative votes and abstentions for each member.
- Consistent with the procedures outlined in section 112.3143, Florida Statutes, the dated and executed conflict of interest form that was submitted at or before the board meeting(s) in which a vote related to the contract took place, for board member/employee who has any relationship with the contracting vendor.

I certify that the information above is true and correct.

Signature of Board Chair / Vice Chair*

Print Name

* Must be certified and attested to by the board's Chair or Vice Chair.

Date

EXHIBIT D
DISCLOSURE AND CERTIFICATION OF
CONFLICT OF INTEREST IN A CONTRACT

I, _____, a board member / an employee of the board (circle one) hereby disclose that I, myself / my employer / my business / my organization/ OR "Other" (describe) _____ (circle one or more) could benefit financially from the contract described below:

Local Workforce Development Board: _____

Contractor Name & Address: _____

Contractor Contact Phone Number: _____

Description or Nature of Contract: _____

Description of Financial Benefit*: _____

For purposes of the above contract the following disclosures are made: The

contractor's principals**/owners***: (check one)

_____ have no relative who is a member of the board or an employee of the board; OR

_____ have a relative who is a member of the board or an employee of the board, whose name is:

The contractor's principals**/owners*** _____ is _____ is not (check one) a member of the board. If applicable, the principal's/owner's name is: _____

Signature of Board Member/Employee

Print Name

Date

* "Benefit financially from a contract" means the special private financial gain to a member, a special private financial gain to any principal which retains the member, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the member or the special private financial gain to any member's relatives or business associate or to a board employee and such benefit is not remote or speculative.

** "Principal" means an owner or high-level management employee with decision-making authority.

*** "Owner" means a person having any ownership interest in the contractor.

NOTICE: CONFLICTS OF INTEREST REGARDING BOARD MEMBERS AND BOARD EMPLOYEES MUST BE DISCLOSED PRIOR TO THE BOARD'S DISCUSSION OR VOTING TO APPROVE THE CONTRACT. BOARD MEMBERS WHO BENEFIT FINANCIALLY OR BOARD MEMBERS OR EMPLOYEES OF THE BOARD WHO HAVE A RELATIONSHIP WITH THE CONTRACTING VENDOR MUST NOT BE PRESENT DURING ANY DISCUSSION AT ANY MEETINGS, INCLUDING SUBCOMMITTEE MEETINGS, INVOLVING THE CONTRACT AND MUST ABSTAIN FROM VOTING OR BEING PRESENT DURING VOTING BY REMOVING HIMSELF OR HERSELF FROM THE ROOM DURING THE PERIOD OF TIME THE VOTES ARE CAST, AND THE CONTRACT MUST BE APPROVED BY A TWO-THIRDS VOTE OF THE BOARD WHEN A QUORUM HAS BEEN ESTABLISHED. COMPLETION OF THIS FORM DOES NOT IN ANY WAY SUPERSEDE OR SUBSTITUTE FOR COMPLIANCE WITH CONFLICT OF INTEREST DISCLOSURE REQUIREMENTS OF SECTION 112.3143, FLORIDA STATUTES, OR SECTION 101(f), WIOA.



RECORD OF ACTION/APPROVAL

Consortium – Friday, June 12, 2020
Board Meeting - Wednesday, June 3, 2020
Executive Committee - Wednesday, May 27, 2020

TOPIC/ISSUE:

Direct Services Annual Report Submission

BACKGROUND:

The Citrus Levy Marion Regional Workforce Development Board currently acts as the direct service provider for services made available through the One Stop career centers. We have been granted the ability to be the service provider (in lieu of contracting a provider) through a waiver granted by the governor through CareerSource Florida. This waiver must be renewed every three years and maintained through submission of an annual report at the beginning of each program year.

We have reached the end of the previous extension periods. A full waiver submission is required for program year beginning July 1, 2020.

POINTS OF CONSIDERATION:

The following waiver request details the reasoning and aspects of our business that are positively impacted by direct service provision by the Citrus Levy Marion Regional Workforce Development Board.

STAFF RECOMMENDATIONS:

Approve submission of the attached Direct Services Waiver Request.

COMMITTEE ACTION:

Charles Harris made a motion to submit the Direct Services Extension Waiver request. Pete Beasley seconded the motion. Motion carried.

BOARD ACTION:

The item appeared on the June 3rd Board meeting Consent Agenda. Al Jones made a motion to accept all items on the Consent Agenda. Theresa Flick seconded. Motion carried.



RECORD OF ACTION/APPROVAL

Consortium – Friday, June 12, 2020
Board Meeting - Wednesday, June 3, 2020
Executive Committee - Wednesday, May 27, 2020

TOPIC/ISSUE:

First issue of our 2020 – 2021 Budget

BACKGROUND:

The budget is based on the following information:

- Funding that we have received the allocation for this coming year or grants that have funding that is carrying forward to the next year.
- Estimations on funding that we have not received yet. We know we will be getting the funds, so we have put in what we received last year and are comfortable that the amounts should be very close. (Wagner Peyser, Veteran, Welfare Transition, Supplemental Nutrition Assistance Program, Trade Assistance, Re-employment)
- Using the 2019-2020 budget, we have used those carry forward numbers to include in this budget.
- We will bring back a new version in August (after we close out the year) that will formalize any area where we have used estimated numbers.

POINTS OF CONSIDERATION:

1. The budget total is very close to last year's budget.
2. We typically receive incentive and supplemental dollars at the beginning of the year under both Adult and Dislocated Worker.
3. COVID-19 will result in more funding being put into the workforce system to assist through this disaster, either is supplemental funding or other grant opportunities.
4. In our staffing areas (where staff costs are charged) we increased the benefits by 4% to cover the increase in health benefits.
5. We also put in "an up to" 5% for a Cost of Living increase

STAFF RECOMMENDATIONS:

1. Approve the 2020 – 2021 budget
2. Discuss, direct and approve an increase within the 5% limit for the staff. This could be just cost of living or cost of living plus merit.

Approve updated 2019 budget, budget/expenditures reports 7/1/18-3/31/20, and draft 2020 budget.

COMMITTEE ACTION:

Al Jones made a motion to approve the 2020-2021 budget. Charles Harris seconded the motion.

Kathy Judkins made a motion to approve a 3% cost of living increase. Al Jones seconded the motion. Motion carried.

BOARD ACTION:

The item appeared on the June 3rd Board meeting Consent Agenda. Al Jones made a motion to accept all items on the Consent Agenda. Theresa Flick seconded. Motion carried.

ATTACHMENT 5								
BUDGET - CSCLM								
PY 2020(JULY 2020 - JUNE 2021)								
	*	*	*	*	*	*	*	*
5/27/2020	ADULT	YOUTH	TAA	DISL. WORKER	Apprenticeship 1	Apprenticeship 3	SOFT SKILLS	SECTOR STRATEGIES
REVENUE								
P.Y. 2019 CONTRACTS	1,395,820	1,339,167	6,300	699,531	78,669	149,748	-	38,941
CARRYFORWARD	195,313	495,407	-	47,674	-	-	-	-
INCENTIVES/SUPPLEMENTAL	-	-	-	-	-	-	-	-
TRANSFER	32,000	-	-	(32,000)	-	-	-	-
TOTAL REVENUE	1,623,133	1,834,574	6,300	715,205	78,669	149,748	-	38,941
EXPENDITURES								
TOTAL ITA	29.05%							
TRAINING:								
ITA %	27%			33%				
ITA/TRAINING	44,000	-	-	-	-	-	-	12,953
OJT	9,000	-	-	-	-	-	-	-
EMPLOYED WORKER	5,000	-	-	-	-	-	-	-
INTERNSHIPS	11,500	-	-	-	-	-	-	-
ECKERD	-	-	-	-	-	-	-	-
TRAINING STAFF	325,000	-	-	211,420	-	-	-	-
TOTAL TRAINING	394,500	-	-	211,420	-	-	-	12,953
OPERATING:								
SUPPORTIVE SVS.	5,000	339,717	-	498	-	-	-	-
DIRECT CHARGE (STAFF)	8,500	-	-	5,400	-	-	-	-
ECKERD	15,000	794,464	-	11,145	-	-	-	-
DEO STAFF TRAVEL	-	-	-	-	-	-	-	-
OPERATING	-	6,000	-	-	15,000	100,000	-	-
TOTAL OPERATING	28,500	1,140,181	-	17,043	15,000	100,000	-	-
PROGRAM SUPPORT:								
FACILITIES	56,776	98,463	311	28,777	-	-	-	-
PROGRAM	57,783	155,908	-	22,049	-	-	-	1,250
INFORMATION TECHNOLOGY	72,227	194,879	-	27,561	-	-	-	1,563
OUTREACH	57,865	156,130	-	22,080	-	-	-	1,252
BUSINESS	290,476	-	-	110,841	-	-	-	6,284
SELF SERVICES	206,714	-	-	78,879	-	-	-	4,472
CAREER SERVICES	238,039	-	-	101,084	-	-	-	5,731
TOTAL PROGRAM SUPPORT	979,881	605,380	311	391,270	-	-	-	20,552
TOTAL EXPENDITURES	1,402,881	1,745,561	311	619,733	15,000	100,000	-	33,505
ADMIN POOL	175,685	70,413	40	76,296	1,945	12,967	-	4,345
GENERAL POOL	44,149	17,694	10	19,173	489	3,258	-	1,092
TOTAL INDIRECT COST RATE	219,834	88,107	50	95,468	2,434	16,225	-	5,436
BALANCE	418	906	5,938	3	61,235	33,523	-	(0)
INDIRECT RATE CALCULATION								
DIRECT TOTAL COSTS	1,402,881	1,745,561	311	619,733	15,000	100,000	-	33,505
LESS: LEASES	(32,989)	(68,353)	-	(20,193)	-	-	-	-
	-	-	-	-	-	-	-	-
SUBAWARD (ECKERDS)	(15,000)	(1,134,181)	-	(11,145)	-	-	-	-
TOTAL MTDC	1,354,892	543,027	311	588,396	15,000	100,000	-	33,505

ATTACHMENT 5									
BUDGET - CSCLM									
PY 2020(JULY 2020 - JUNE 2021)									
	*	*	*	*		*	*	*	*
5/27/2020	RURAL INITIATIVES	VOC REHAB	WAGNER PEYSER	VETERAN DVOP	ALLACHUA	WTP	SNAP	FL Corrections	BRIDGE SKILLED
REVENUE									
P.Y. 2019 CONTRACTS	31,250	9,622	450,000	37,793		1,759,613	229,824	100,760	-
CARRYFORWARD	-	-	29,563	19,565	-	774	57,410	-	107,727
INCENTIVES/SUPPLEMENTAL TRANSFER	-	-	-	-	-	-	-	-	-
TOTAL REVENUE	31,250	9,622	479,563	57,358	-	1,760,387	287,234	100,760	107,727
EXPENDITURES									
TOTAL ITA									
TRAINING:									
ITA %									
ITA/TRAINING	-	-	-	-	-	-	-	-	24,450
OJT	-	-	-	-	-	-	-	-	-
EMPLOYED WORKER	-	-	-	-	-	-	-	-	-
INTERNSHIPS	-	-	-	-	-	-	-	-	-
ECKERD	-	-	-	-	-	-	-	-	-
TRAINING STAFF	-	-	-	-	-	-	-	-	-
TOTAL TRAINING	-	-	-	-	-	-	-	-	24,450
OPERATING:									
SUPPORTIVE SVS.	-	-	-	-	-	129,000	-	-	-
DIRECT CHARGE (STAFF)	-	-	-	-	-	400,000	90,410	60,000	10,731
ECKERD	-	2,902	-	-	-	35,000	-	-	-
DEO STAFF TRAVEL	-	-	9,600	2,000	-	-	-	-	-
OPERATING	10,395	-	150,000	3,500	-	-	-	724	-
TOTAL OPERATING	10,395	2,902	159,600	5,500	-	564,000	90,410	60,724	10,731
PROGRAM SUPPORT:									
FACILITIES	-	856	74,275	25,044	-	61,442	14,700	-	1,867
PROGRAM	1,003	280	15,403	531	-	54,432	8,726	-	3,395
INFORMATION TECHNOLOGY	1,254	350	19,253	663	-	68,038	10,907	-	4,244
OUTREACH	1,005	280	15,425	532	-	54,509	8,738	-	3,400
BUSINESS	5,043	1,408	-	-	-	273,629	43,863	-	17,068
SELF SERVICES	3,589	1,002	55,103	1,899	-	194,726	31,215	-	12,147
CAREER SERVICES	4,599	1,284	70,615	2,433	-	249,543	40,002	26,867	15,566
TOTAL PROGRAM SUPPORT	16,493	5,460	250,075	31,102	-	956,320	158,150	26,867	57,687
TOTAL EXPENDITURES	26,888	8,362	409,675	36,602	-	1,520,320	248,560	87,591	92,868
ADMIN POOL	3,487	1,007	46,436	2,492	-	191,605	30,907	10,525	11,874
GENERAL POOL	876	253	11,669	626	-	48,149	7,767	2,645	2,984
TOTAL INDIRECT COST RATE	4,363	1,260	58,105	3,118	-	239,754	38,674	13,169	14,858
BALANCE	(1)	(0)	11,783	17,638	-	313	1	(1)	1
INDIRECT RATE CALCULATION									
DIRECT TOTAL COSTS	26,888	8,362	409,675	36,602	-	1,520,320	248,560	87,591	92,868
LESS: LEASES	-	(594)	(51,561)	(17,385)	-	(42,653)	(10,204)	(6,425)	(1,296)
SUBAWARD (ECKERDS)	-	-	-	-	-	-	-	-	-
TOTAL MTDC	26,888	7,768	358,114	19,217	-	1,477,667	238,355	81,167	91,572

ATTACHMENT 5									
BUDGET - CSCLM									
PY 2020(JULY 2020 - JUNE 2021)									
	*	*	*	*	*	*	*	*	
5/27/2020	EMERGING INITIATIVES	YOUTH BUILD 3	YOUTH BUILD 2	COVID 19 PPE	COVID 19	RWB 6	REA	UN- RESTR	TOTAL
REVENUE									
P.Y. 2019 CONTRACTS	20,833	-	-	-	101,679	5,444	13,000	-	6,467,994
CARRYFORWARD		671,943	262,950	-	-	-	-	307,681	2,196,007
INCENTIVES/SUPPLEMENTAL TRANSFER	-	-	-	-	-	-	-	-	-
TOTAL REVENUE	20,833	671,943	262,950	-	101,679	5,444	13,000	307,681	8,664,001
EXPENDITURES									
TOTAL ITA									
TRAINING:									
ITA %									
ITA/TRAINING		27,600	-	-	-	-	-	-	109,003
OJT		-	-	-	-	-	-	-	9,000
EMPLOYED WORKER		-	-	-	-	-	-	-	5,000
INTERNSHIPS		-	-	-	-	-	-	-	11,500
ECKERD		-	-	-	-	-	-	-	-
TRAINING STAFF	-	-	-	-	-	-	-	-	536,420
TOTAL TRAINING	-	27,600	-	-	-	-	-	-	670,923
OPERATING:									
SUPPORTIVE SVS.		138,720	135,013	-	-	-	-	-	747,948
DIRECT CHARGE (STAFF)	-	-	-	-	-	-	-	-	575,041
ECKERD		104,900	69,036	-	-	-	-	-	1,032,447
DEO STAFF TRAVEL		-	-	-	-	-	-	-	11,600
OPERATING	6,930	-	-	-	33,821	-	-	40,000	366,370
TOTAL OPERATING	6,930	243,620	204,049	-	33,821	-	-	40,000	2,733,406
PROGRAM SUPPORT:									
FACILITIES	-	9,255	6,300	-	-	5,444	5,833	-	389,343
PROGRAM	669	-	-	-	3,264	-	-	-	324,693
INFORMATION TECHNOLOGY	836	-	-	-	4,080	-	-	-	405,855
OUTREACH	670	-	-	-	3,269	-	-	-	325,155
BUSINESS	3,362	-	-	-	16,409	-	-	-	768,384
SELF SERVICES	2,392	-	-	-	11,677	-	-	-	603,814
CAREER SERVICES	3,066	-	-	-	14,964	-	-	-	773,795
TOTAL PROGRAM SUPPORT	10,995	9,255	6,300	-	53,662	5,444	5,833	-	3,591,038
TOTAL EXPENDITURES	17,924	280,475	210,349	-	87,483	5,444	5,833	40,000	6,995,367
ADMIN POOL	2,324	3,946	250	-	11,344	-	231	5,187	663,304
GENERAL POOL	584	992	63	-	2,851	-	58	1,303	166,684
TOTAL INDIRECT COST RATE	2,908	4,937	313	-	14,194	-	289	6,490	829,988
BALANCE	0	386,530	52,289	-	1	(0)	6,877	261,191	838,647
INDIRECT RATE CALCULATION									
DIRECT TOTAL COSTS	17,924	280,475	210,349	-	87,483	-	5,833	40,000	6,989,922
LESS: LEASES	-	(6,425)	(4,373)	-	-	-	(4,049)	-	(266,500)
	-	-	-	-	-	-	-	-	-
SUBAWARD (ECKERDS)	-	(243,620)	(204,049)	-	-	-	-	-	(1,607,995)
TOTAL MTDC	17,924	30,430	1,927	-	87,483	-	1,784	40,000	5,115,427



RECORD OF ACTION/APPROVAL

**Consortium
Friday, June 12, 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 covers the period of July 1, 2020 through June 30, 2024

POINTS OF CONSIDERATION:

The plan was posted for public comment for a period of 30 days. The plan was previously sent to all board and consortium members for review and comment. No comments were received.

STAFF RECOMMENDATIONS:

Approve the local plan as written beginning program year July 1, 2020.

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: March 13, 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 at 2pm – CareerSource Citrus Center
 - Levy Presentation & Listening Session – February 25, 2020 at 2pm – CareerSource Levy Center
 - Marion Presentation & Listening Session – February 26, 2020 at 20m – CareerSource Marion Center
 - Draft Plan Presented to Consortium – February 28, 2020 – CSCLM
 - Draft Plan Presented to Full Board – March 11, 2020 – College of Central Florida
 - 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)).

None received.

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.

Interlocal Agreement

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

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.

By-Laws

- 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

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.**

after Hurricane Michael's widespread devastation in the Florida Panhandle in the fall of 2018.

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.

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, Fishing and Hunting	4,684	2,590	1,084	1,462	45	0.2%
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 Partnership, 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 oyed 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 oyed 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 oyed 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 monthl

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

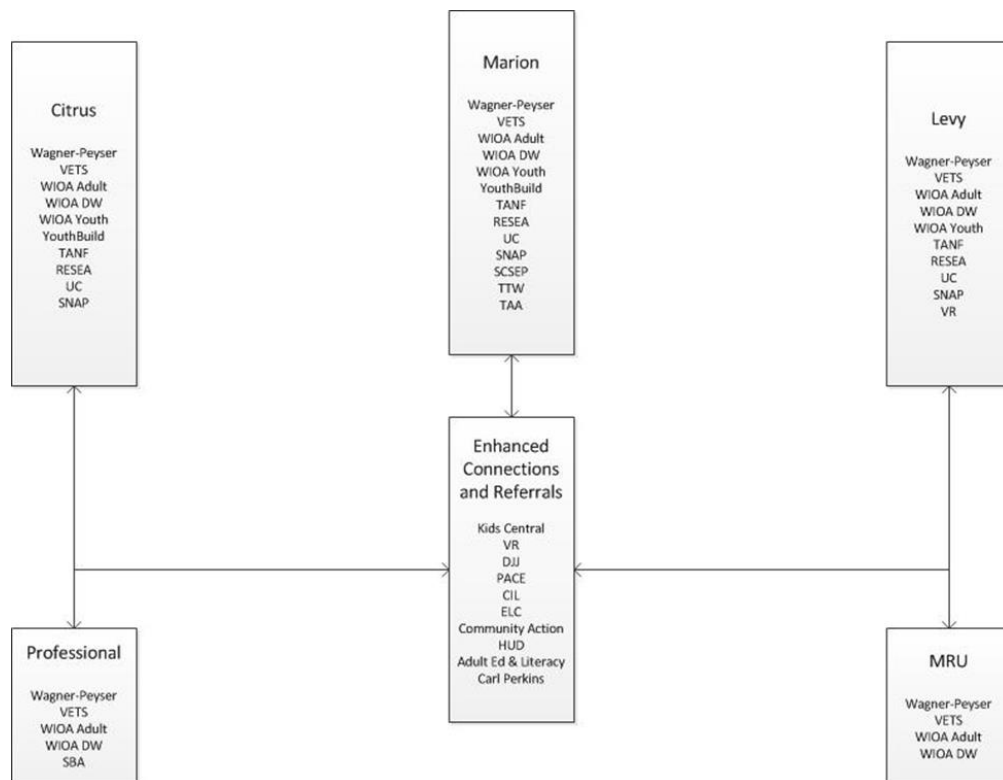
- supervision of the local area. **Provided in 3 Career Centers with trained staff assisting in all others**
- WIOA Adult and Dislocated Worker Self-services, Career Services, and Training Services, provided through direct services. **Provided in all centers and MRUs**
 - WIOA Youth services provided 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

SIGNATURE PAGE

This plan represents the efforts of CareerSource Citrus Levy Marion to implement the Workforce Innovation and Opportunity Act in the following counties: Citrus, Levy, and Marion.

We will operate in accordance with this plan and applicable federal and state laws, rules and regulations.

Workforce Development Board Chair

Rachel Riley

Signature

Date

Chief Elected Official

Jimmy T. Smith

Signature

Date

ATTEST: _____

END OF LOCAL PLAN INSTRUCTIONS

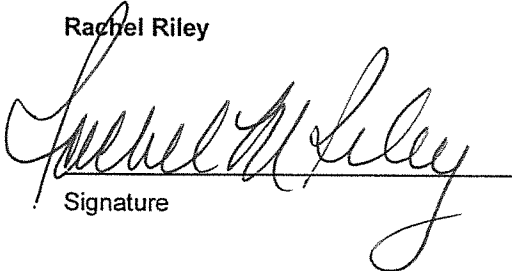
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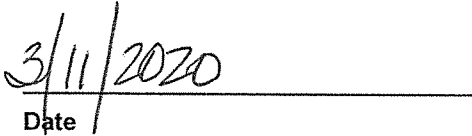
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Workforce Development Board Chair

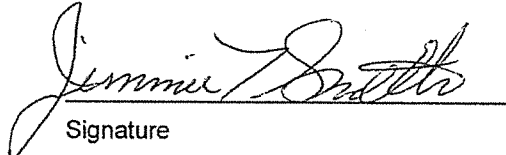
Rachel Riley

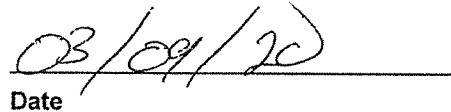

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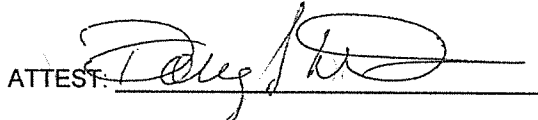

Date

Chief Elected Official

Jimmy T. Smith


Signature


Date

ATTEST: 

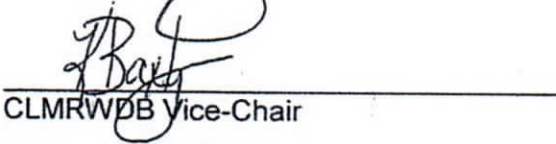
END OF LOCAL PLAN INSTRUCTIONS

SIGNATURE PAGE


APPROVED:



CLMRWDB Chair

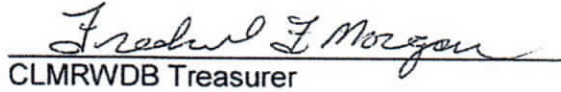


CLMRWDB Vice-Chair



Board Attorney

ATTEST:



CLMRWDB Treasurer