



Consortium AGENDA

Thursday, June 17, 2021 – 1:00 p.m.

Enterprise Center Bldg 42, 3003 SW College Rd, Suite 206, Ocala, FL

Zoom Meeting Info: <https://us02web.zoom.us/j/88114636434>
Phone 1-646-558-8656 Meeting ID: 881 1463 6434

Call to Order		J. Gold
Roll Call		C. Schnettler
Approval of Minutes, May 17, 2021	Pages 2 - 3	J. Gold

DISCUSSION ITEMS

State Update		
DEO Board Training	Pages 4 - 101	R. Skinner

ACTION ITEMS

Budget 2021-2022	Pages 102 - 104	R. Skinner
Term Limits	Pages 105 - 106	R. Skinner
Board Member Appointment	Pages TBD	R. Skinner

PUBLIC COMMENT

PROJECT UPDATES

Board Agenda Meeting 6/9/2021	Pages 107 - 108	R. Skinner
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MATTERS FROM THE FLOOR

ADJOURNMENT

2020 – 2021 MEETING SCHEDULE						
Performance/ Monitoring	Business and Economic Development	Career Center	Marketing/ Outreach	Executive	Full Board	
All in-person committee meetings are held at the CF Ocala Campus, Enterprise Center, Room 206. All teleconference meetings will be held through Zoom.						
Tuesday, 9:00 am	Thursday, 9:00 am	Thursday, 9:30 am	Wednesday, 9:00 am	Wednesday, 9:30 am	Wednesday, 11:30 am	
8/11/2020	8/13/2020	8/20/2020	8/26/2020	9/2/2020	9/9/2020	Zoom
11/3/2020	11/5/2020	11/19/2020	11/18/2020	12/2/2020	12/9/2020	Zoom
2/9/2021	2/11/2021	2/18/2021	2/24/2021	3/3/2021	3/24/2021	CF Ocala
5/11/2021	5/13/2021	5/20/2021	5/26/2021	6/2/2021	6/9/2021	CF Ocala

OUR VISION STATEMENT

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



**CAREERSOURCE CITRUS LEVY MARION
Consortium**

MINUTES

DATE: May 17, 2021
PLACE: College of Central Florida, Enterprise Center, Building 42, Ocala, FL
TIME: 2:00 p.m.

MEMBERS PRESENT

Commissioner Gold
Commissioner Meeks
Commissioner Schlabach

MEMBERS ABSENT

OTHER ATTENDEES

Rusty Skinner, CSCLM
Dale French, CSCLM
Cory Weaver, CSCLM

Robert Stermer, Attorney
Cira Schnettler, CSCLM
I

CALL TO ORDER

The meeting was called to order by Commissioner Gold, at 2:00 p.m.

ROLL CALL

Cira Schnettler called roll and a quorum was declared present.

APPROVAL OF MINUTES

Commissioner Meeks made a motion to approve the minutes from the March 10, 2021 meeting. Commissioner Schlabach seconded the motion. Motion carried.

DISCUSSION ITEMS

State Update

Rusty Skinner notified the members that Bills 1507 and 98 were approved. These Bills are intended to help individuals navigate the multiple systems within education and workforce. There are a variety of challenges in this attempt to streamline systems. Members will be updated as things progress. One major change is the implementation of term limits for board members. Within the Bills, term limits are set to 8 years beginning on July 1. Rusty Skinner reviewed the Terms Matrix included in the packet, as well as the proposed term limits. This item will be brought back to the June meeting for final vote.

ACTION ITEMS

Sub-Grantee Agreement

Rusty Skinner explained to the members that this Agreement is a modification to the current Agreement. DEO brought together a workgroup to hear concerns about specifics items in the Agreement. DEO listened to suggestions from the CareerSource regions and made positive changes that were well received. Commissioner Schlabach made a motion to accept the modified Agreement and approve the Consortium Chair's signature. Commissioner Meeks seconded the motion. Motion carried.

Board Appointments

Commissioner Meeks made a motion to approve the appointments of Lewrissa Mainwaring and Carl Flanagan. Commissioner Schlabach seconded the motion. Motion carried.

PUBLIC COMMENT

None

PROJECT UPDATES

None

MATTERS FROM THE FLOOR

None

ADJOURNMENT

There being no further business, the meeting was adjourned at 2:18 p.m.

APPROVED:



FLORIDA CHIEF ELECTED OFFICIALS GUIDE

Workforce Innovation and Opportunity Act (WIOA)
Roles and Responsibilities

May 2021

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Introduction

As an elected official, your priorities lie in taking care of your citizens by building a thriving community. Your objectives may include safe communities with low crime, plentiful business development and job opportunities, increased tax revenue, low unemployment rates, and healthy and vibrant constituents. You work to create a business environment with plenty of high-quality jobs and people with the right skills to fill those jobs in the community. All of this contributes to increased tax revenue and wealth, which results in more opportunities for the community to grow and enhance quality of life and services for the residents – your constituents.

As an elected official, you are a critical voice in how the workforce system operates and supports your community. As the system is built upon the concept of local control, considerable authority rests with the chief elected officials in a local workforce development area. Given that your elected position necessarily immerses you in economic development activities and creating an environment conducive for business growth and expansion, the Workforce Innovation and Opportunity Act is a key tool for creating – and enabling residents to fill – jobs in critical industries.



Throughout the document, this icon is used to denote a task that requires another group to consult with the chief elected officials. These tasks require your input but another organization (local workforce development board, state workforce development board, or Governor) is responsible for accomplishing the task and gaining your input.



This icon is used to denote a task for which the local workforce development board shares responsibility with the chief elected officials or for which the chief local elected official must approve the work of the local workforce development board.

Terminology Disclaimer

The law and regulations refer to a singular chief elected official and chief elected officials (plural). Although common within the system, neither the law nor the regulations refer to a chief local elected official. However, chief local elected official is used in some guidance from the United States Department of Labor. For purposes of this guide, the terms chief elected official and chief local elected official are used to ensure differentiation between the roles.

Additionally, it is understood that there are different models within Florida for how local governments are organized and how chief elected officials operate. For local areas that use a consortium approach for the chief elected official duties, when the term “chief local elected official” is utilized it also applies to the chief elected official consortium.

Overview of the Workforce Innovation and Opportunity Act

The [Workforce Innovation and Opportunity Act](#)¹, commonly referred to as WIOA, was enacted on July 22, 2014. Workforce Innovation & Opportunity Act is designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy. Congress passed the Act by a wide bipartisan majority and it was the first legislative reform in 15 years of the public workforce system. It outlines the vision, goals, objectives, and requirements for how the public workforce system is structured and operates and brings together the core employment and training programs funded by the federal government.

The Workforce Innovation & Opportunity Act vision seeks to improve job and career options for our nation's workers and job seekers through an integrated, job-driven public workforce system that links diverse talent to businesses.² It aims to support the development of strong, vibrant regional economies where businesses thrive, and people want to live and work. The Workforce Innovation & Opportunity Act is based on the idea of the public workforce system supporting, through its programs and services, the development of a talent pipeline that has the skills and expertise that local businesses need to thrive – thus driving economic and community prosperity.

I. Guiding Principles

The Workforce Innovation & Opportunity Act is the foundation for each state's publicly funded workforce system. As the foundation, there are key principles³ upon which the system is built:

Integrated Service Delivery – Programs do not duplicate each other, but, instead, work collaboratively to deliver the best outcome for the customer.

Focus on Strategy – This element is critical to the local workforce development board. The boards are focused on the big picture of workforce development and strategies to ensure that the supply side (workforce system) meets the demand side (employers/ business community).



¹ [Workforce Innovation and Opportunity Act](#)

² [Training and Employment Guidance Letter \(TEGL\) 19-14.](#)

³ [TEGL 19-14.](#)

Regional Economic Development – Meeting workforce needs is critical to economic growth. State and Local Workforce Development Boards – in partnership with workforce, economic development, education, and social service organizations at the state, regional and local levels– align education and training investments to regional civic and economic growth strategies, ensuring that all job seekers and businesses can access pathways to prosperity.

High-Quality Services – The workforce system must be focused on high-quality services by all partners to all customers. To do this, stakeholders must increase coordination across programs and resources to support a comprehensive system that seamlessly provides integrated services that are accessible to all jobseekers, workers, and businesses.

Accountability and Transparency – Decisions about the system are informed by analyzing data and evaluating performance standards. This means making purposeful decisions about the system and how it will operate as well as operating within Open Meetings Laws and procuring service providers. It means being accountable for the use of public funds and how those funds are spent.

II. Hallmarks of Excellence

When the system is built upon the five principles, the outputs of the system are what the U.S. Department of Labor calls the Hallmarks of Excellence. The Workforce Innovation & Opportunity Act envisions a workforce system that is quality focused, employer driven, customer centered, and tailored to meet the needs of regional economies. The vision is one of collaboration and customer focus with business driving the system’s agenda and range of services. This vision is embodied in three Hallmarks of Excellence.⁴

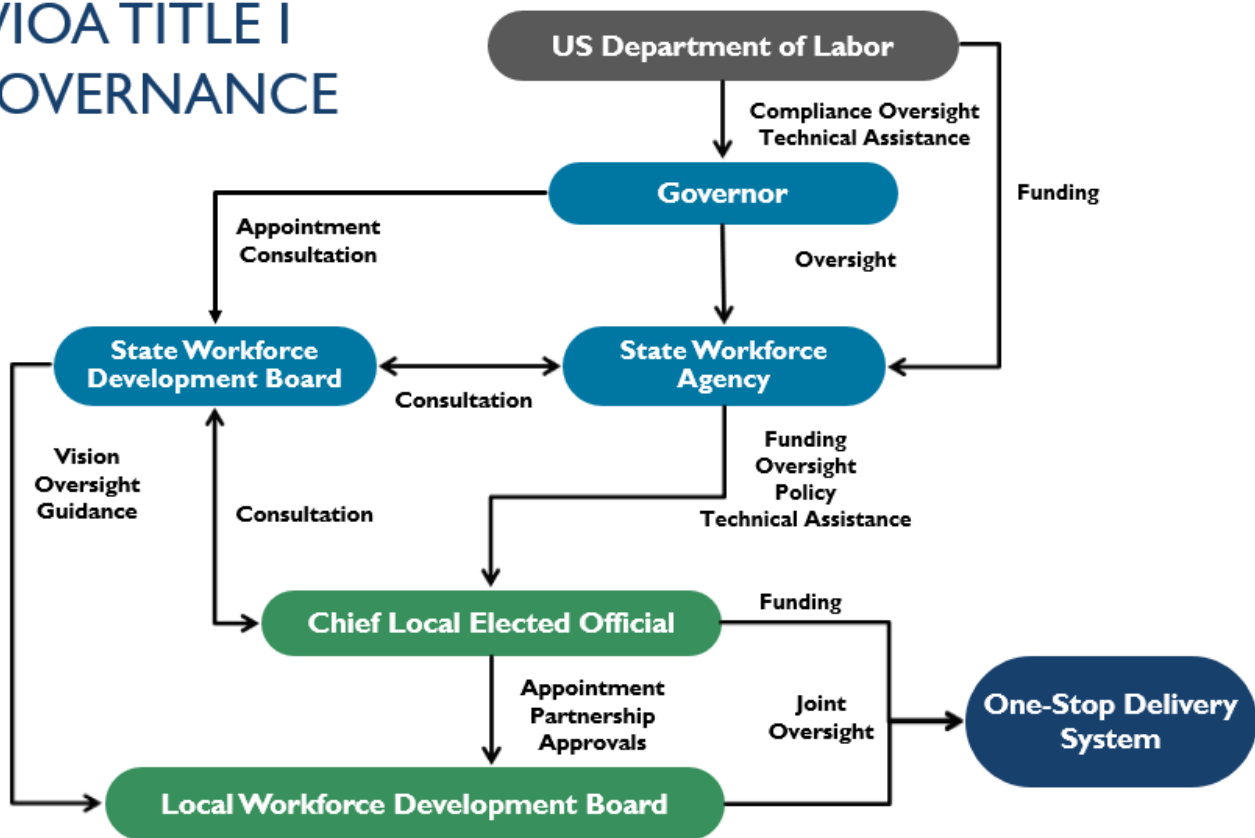


⁴ [TEGL 19-14](#)

III. Governance and Oversight

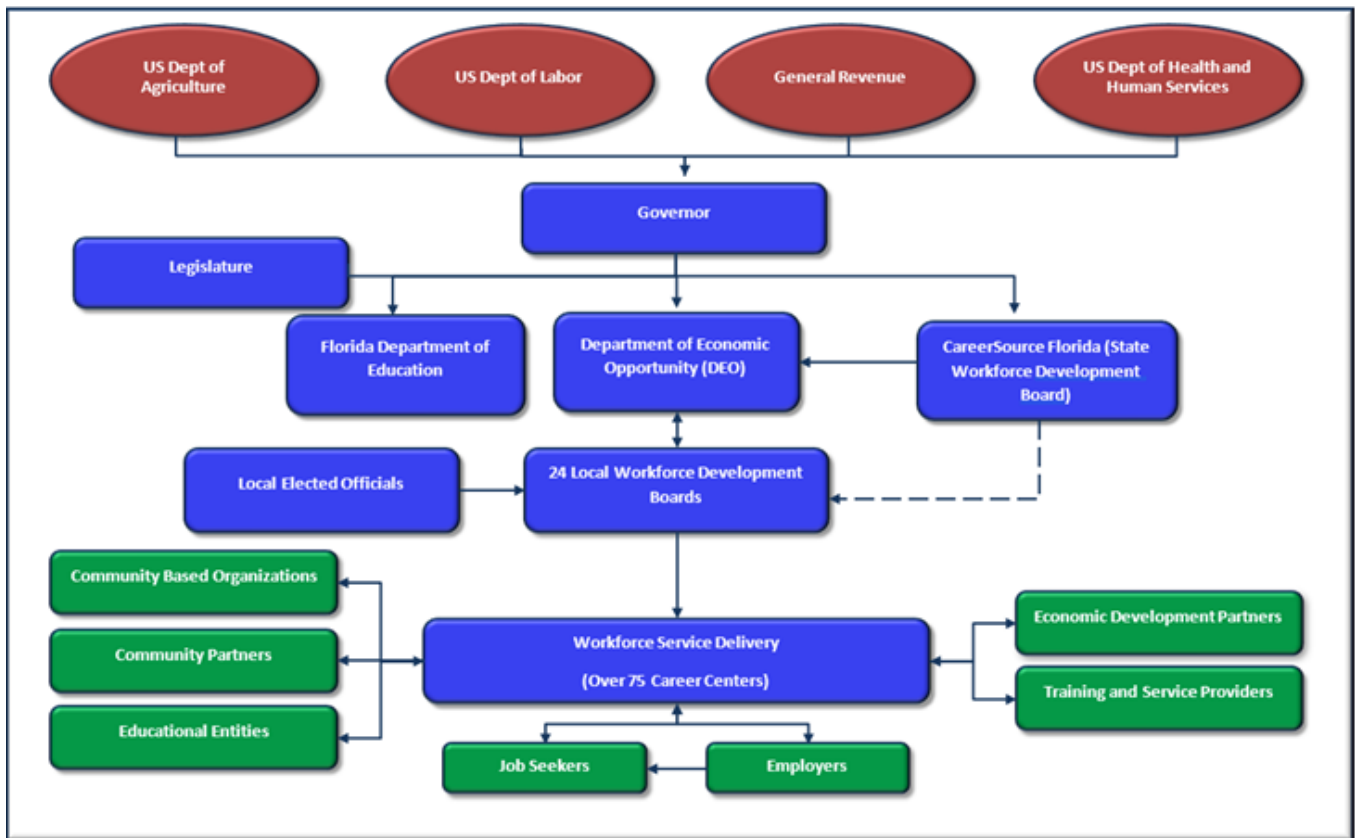
The public workforce system is a network of federal, state, and local entities that support economic expansion and develop the talent of our nation's workforce. Although the public workforce system is primarily federally funded, the services for business customers and individual customers are available at the state and local levels. Much of the funding for the workforce system comes through federally mandated programs, such as the Workforce Innovation & Opportunity Act, and it requires a formal governance structure with clearly defined roles. The graphic below provides a high-level perspective of the stakeholders and the interconnectivity of their roles within the system as outlined in the federal law.

WIOA TITLE I GOVERNANCE



Florida's Framework

Utilizing funds from the U.S. Department of Agriculture, U.S. Department of Labor, U.S. Department of Health and Human Services as well as General Fund dollars from the state legislature, Florida's workforce system framework is depicted in the graphic below. The red circles indicate funding sources. The blue boxes indicate state and local level systems and structures. The green boxes represent local service delivery, partners, and customers.



U.S. Department of Labor

The U.S. Department of Labor's Employment and Training Administration administers the Workforce Innovation & Opportunity Act Title I program. There are multiple titles in the law and other federal agencies play a partnering role, but for the purpose of this training, we will focus on the primary role which is held by U.S. Department of Labor's Employment and Training Administration.

The federal funding to each state comes through the U.S. Department of Labor. As such, the USDOL Employment and Training Administration has compliance and oversight requirements with the states. U.S. Department of Labor's Employment and Training Administration also provides technical assistance to states. The U.S. states and territories are divided into six regions for purposes of U.S. Department of Labor's Employment and Training Administration. The regional offices provide technical assistance to the state workforce agencies and to the local workforce development areas.



[U.S. Department of Labor, Employment and Training Administration](#)

Governor

The Governor receives the federal Workforce Innovation & Opportunity Act funding and, typically, assigns responsibility for Workforce Innovation & Opportunity Act to the state workforce agency. The Workforce Innovation & Opportunity Act outlines specific activities that must be performed by the Governor. One such role is the appointment of the state workforce development board. Additionally, the Governor may delegate duties to the state workforce development board or the state workforce agency.

State Workforce Development Board

The role of the state workforce development board, which in Florida is the CareerSource Florida Board of Directors, is to develop and continuously improve the state workforce system. The state workforce development board in conjunction with the Governor, establishes the vision for the state's full implementation of the Workforce Innovation & Opportunity Act and oversees local implementation of that vision. The Board fulfills its purpose by ensuring that the Workforce Innovation & Opportunity Act State Plan, policies, and strategies reflect the appropriate vision, embody the Hallmarks of Excellence, and are designed to provide the talent pipeline that meets the needs of businesses and supports community prosperity and economic vitality.

The state workforce development board is responsible for convening state, regional, and local partners to-

- ▶ Enhance the capacity and performance of the system
- ▶ Align and improve the outcomes of programs

- ▶ Promote economic growth through these efforts
- ▶ Engage businesses and other stakeholders to achieve the Workforce Innovation & Opportunity Act vision
- ▶ Support achievement of the state's strategic and operational vision and goals as outlined in the Combined State Plan
- ▶ Provide recommendations to streamline the workforce system
- ▶ Ensure continuous improvement of the system, including:
 - ▶ Removing barriers that impede system alignment
 - ▶ Develop strategies that support career pathways

State Workforce Development Board Membership

The Governor appoints members from across the state who represent the following categories:

- ▶ Business
- ▶ Labor organizations and workforce representatives
- ▶ State agencies that administer programs in workforce system
- ▶ Elected officials (state and local)
- ▶ Community based organizations

Businesses must be, at a minimum, 51 percent of the state workforce development board representatives and a business representative, appointed by the Governor, must serve as the board's chair.

[State Workforce Development Board](#)

State Workforce Agency

The Florida Department of Economic Opportunity is the state workforce agency that has oversight for the administrative functions of the state and local system. The state agency is required to issue policy to the system and to monitor, on an annual basis, the services provided by the local workforce development areas. It is the state workforce agency that executes a grant agreement with the local fiscal agent to receive the Workforce Innovation & Opportunity Act funds.

[Florida Department of Economic Opportunity](#)

Local Workforce Development Board

The Workforce Innovation & Opportunity Act establishes local workforce development boards that connect employers and job seekers together to strengthen the local economy. The local workforce development board's role is to develop strategic plans that set funding priorities for the local area. Local workforce development boards convene partnerships between businesses and community stakeholders and establish sector partnerships driven by in-demand occupations and industries.

Sector partnerships are regional, industry focused approaches to building a skilled workforce and are an effective way to align public and private resources to address the talent needs of employers and define and build career pathways for workers.

Local Governance Oversight

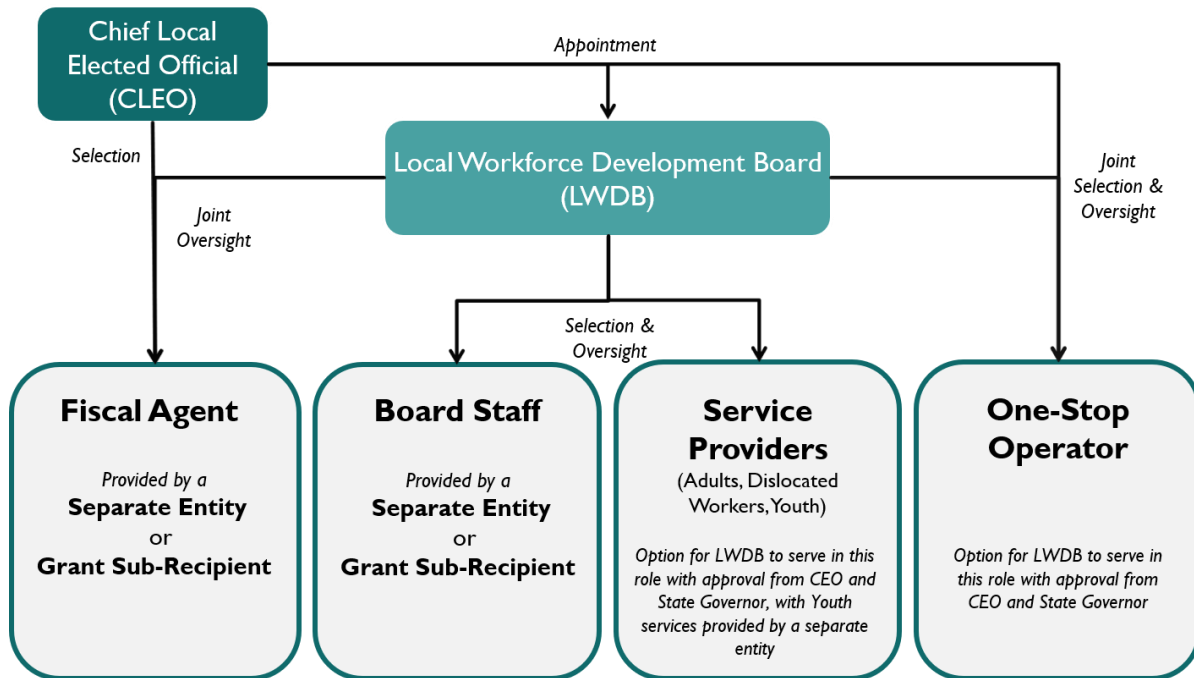
A foundational philosophy within the Workforce Innovation & Opportunity Act is the concept of local control. This means that the local governance structure is where decisions are made regarding strategy and service delivery because it is local people who know best how to serve a local area. This philosophy is reflected in the following ways:

- ▶ Chief local elected official appoints the local workforce development board members
- ▶ Local workforce development board selects service providers and One-Stop Operator
- ▶ Local workforce development board in consultation with the chief elected officials develops local plan that aligns with the state workforce development plan

There are four roles at the local level which must be selected or appointed-

- ▶ Fiscal Agent- Selected by chief local elected official
- ▶ Service Providers - Procured by local workforce development board with approval from chief local elected official
- ▶ Local workforce development board staff and executive leadership- Selected by local workforce development board
- ▶ One-Stop Operator- Procured by local workforce development board with approval from chief local elected official

A contract or other legal binding agreement is required for the execution of the four local roles.



[CareerSource Florida's Administrative Policy 110: Local Workforce Development Area and Board Governance](#) outlines local governance requirements.

Overview of Local One-Stop System

The one-stop system, known as the American Job Center network, brings together various programs (referred to as partners) to ensure businesses and job seekers have access to information and services that lead to positive educational and employment outcomes. The one-stop system brings together workforce development, education, and other human service-focused services into a seamless customer-focused network. The goal of the one-stop system is to enhance access to programs and improve long-term employment outcomes for business customers and job seekers.⁵

In each local workforce development area there must be at least one comprehensive one-stop center. A comprehensive center is a physical location where business and jobseeker customers can access the programs and services of all required partners, along with any additional partners as determined by the local workforce development board and chief local elected official.⁶ A comprehensive center must have at least one staff person present who delivers adult and dislocated worker services.⁷

The management of the one-stop system is the shared responsibility of the local workforce development board, chief local elected official, WIOA core program partners, required one-stop partners, one-stop operators, service providers, and any non-mandatory partners added to the local system by the local workforce development board and chief local elected official. In other words, the system is a total collaborative for the planning, operations, and management of local workforce services.

I. Mandatory One-Stop Partners

There are two levels of mandatory partners within the system - core and required.⁸ Aside from the statutorily prescribed responsibilities of all partners, core partners share in the performance measures of the one-stop system, whereas the required (non-core) partners adhere to their program-specific performance measures.

⁵ [20 CFR 678.300](#)

⁶ [20 CFR 678.305](#)

⁷ [Training and Employment Guidance Letter 16-16](#)

⁸ [Training and Employment Guidance Letter 04-15](#)

Core Partners

WIOA Title	Federal Legislation/ Act	FL Administering Agency
I	Adult, Dislocated Worker, Youth	Department of Economic Opportunity
II	Adult Education & Family Literacy	Department of Education
III	Wagner Peyser Act	Department of Economic Opportunity
IV	Rehabilitation Act of 1973	Department of Education, Vocational Rehabilitation and Division of Blind Services

Other Required (non-Core) Partners

- ▶ Career and Technical Education
- ▶ Senior Community Services Employment Program (SCSEP)
- ▶ Job Corps
- ▶ Youth Build
- ▶ Native American Program
- ▶ National Farmworker Jobs Program
- ▶ State Unemployment Compensation Programs
- ▶ Job for Veterans State Grant (JVSG)
- ▶ Reentry Employment Opportunities
- ▶ Housing and Urban Development Employment & Training Programs
- ▶ Community Services Block Grant Employment & Training Program
- ▶ Temporary Assistance to Needy Families (TANF)

Responsibilities of Partners

All mandatory partners should be aware of their responsibility under the law. The local workforce development board is required to convene the partners and provide information on their responsibilities and share any relevant decisions made by the local workforce development board. All mandatory partners should be encouraged to attend local workforce development board meetings and participate on committees and task forces. All partners must-

- ▶ Provide access to their programs through the one-stop system
- ▶ Use their program's funds to-
 - ▶ Provide career services and
 - ▶ Maintain the one-stop system and jointly fund it
- ▶ Sign the Memorandum of Understanding with the local workforce development board and participate in the operation of the system.
- ▶ Provide representation on the local workforce development board, as required, and participate on committees of the local workforce development board, as needed.

There are three methods for providing access to each of the required services:⁹

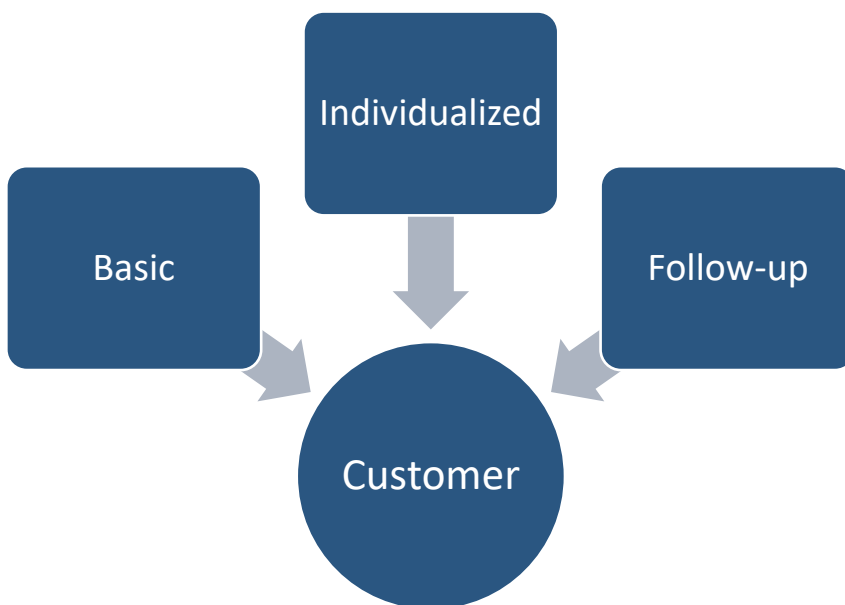
- ▶ Have program staff person present at the center; or
- ▶ A staff person of a partner program at the one-stop center sufficiently trained to provide information; or
- ▶ Making a timely direct linkage at the one-stop center via technology to a qualified staff person.

II. One-Stop Services

Career Services

Career centers must provide services to individual customers based on their specific needs, including the seamless delivery of multiple services. There are three types of career services for Adults and Dislocated Workers that must be delivered through the one-stop delivery system by mandated partners: Basic, Individualized, and Follow up. There is no required sequence of services.

- ▶ **Basic** – available to everyone and are generally not considered to require intensive staff time.
- ▶ **Individualized** – if career center staff determine that individualized career services are appropriate for an individual to obtain or retain employment, these services must be made available to the individual.
- ▶ **Follow up** – must be provided as appropriate for participants who are placed in unsubsidized employment for up to 12 months after the first day of employment.



For a list of Basic and Individualized Career Services, refer to Appendix I.

⁹ [20 CFR 678.305\(d\)](#)

Training Services

Customers who are eligible may establish Individual Training Accounts and receive funding for training in instances where financial aid, Pell grants, and grant assistance from other sources are not available to cover the cost of training. Generally, participants receive an assessment to determine the career pathway and direction, along with what type of training or retraining, best suits the individual's needs. Adults and dislocated workers receive access to a list of training providers and programs. Training resources are coordinated with one-stop partners and other entities, as appropriate.

In Florida, at least 50 percent of Title I funds for Adults and Dislocated Workers which are passed through to local workforce development boards shall be allocated to and expended on Individual Training Accounts unless a local workforce development board obtains a waiver from the state board.¹⁰

Training Services for Adult and Dislocated Worker

- ▶ Occupational skills training
- ▶ Skills upgrade and retraining
- ▶ Job readiness training in combination with other training services
- ▶ Adult education and literacy activities
- ▶ English language acquisition
- ▶ Work-based learning opportunities
- ▶ Entrepreneurial training

Job readiness training is sometimes referred to as career readiness, soft skills, essential skills, or work readiness. These skills include, but are not limited to, punctuality, basic reading and math, teamwork, conflict resolution, problem solving, adaptability, and other competencies necessary for employment.

Youth Services

Just as there are career services for adults and dislocated workers, WIOA provides services for youth in two categories - in school¹¹ and out of school¹². Of the youth allocation received by the local workforce development board, 75% must be spent on out of school youth. School status is determined at the time the youth is determined eligible for the program. The U.S. Department of Labor has provided detailed guidance on youth eligibility.¹³

- ▶ **In-School Youth** (ISY) – ages 14 -21 and enrolled in school
- ▶ **Out-of-School Youth** (OSY) - ages 16-24 and not enrolled in school

Youth service providers must be competitively procured unless the local board has determined that there are not enough providers or there are some under-performing providers available in the local area and can thereby justify a sole-source procurement.

¹⁰ [445.003\(3\)\(a\)\(1\)](#)

¹¹ [20 CFR 681.220](#)

¹² [20 CFR 681.210](#)

¹³ [Training and Employment Guidance Letter 21-16](#)

For more information on the Youth program, refer to Appendix II.

Business Services

The provision of business services is mandatory within the one-stop delivery system to ensure that the talent development needs of the businesses in the local area are met. Applicable one-stop partners must develop, offer, and deliver quality business services that assist business and industry in overcoming the challenges of recruiting, retaining, and developing talent for the regional economy. To support business and industry effectively, one-stop center staff must:

- ▶ Have a clear understanding of industry skill needs
- ▶ Identify appropriate strategies for assisting employers and coordinate business service activities across partner programs and
- ▶ Develop an integrated and aligned business services strategy across partners to present a unified voice in the system's communications with employers.

Services that must be available to local employers¹⁴:

- ▶ Labor exchange activities (the process of posting an available job and a qualified candidate being matched to that job)
- ▶ Labor market information

Local workforce development areas must establish and develop relationships and networks with large and small employers and their intermediaries as well as develop and convene sector partnerships.

Customized services may also be developed for employers or groups of employers. Customized services are tailored specifically based on need. Examples of customized services include, but are not limited to:

- ▶ Customized screening and referral of qualified participants in career and training services
- ▶ Writing/reviewing job descriptions and employee handbooks
- ▶ Coordinating hiring events
- ▶ Brokering incumbent worker training or other customized training
 - ▶ Grant funded incumbent worker training for training existing employees of a Florida business.
 - ▶ Quick Response training funds for expanding businesses to implement flexible and customized training for new, full time permanent employees.

¹⁴ [20 CFR 678.430 \(a\) \(4\)\(ii\) and \(a\)\(6\)](#), [34 CFR 361.430 \(a\)\(4\)\(ii\) and \(\(a\)\(6\)](#), [34 CFR 463.430 \(a\)\(4\)\(ii\) and \(a\)\(6\)](#)

- ▶ Rapid Response and Layoff Aversion services focused on reacting to announced layoffs, assisting impacted workers and proactively engaging with business to prevent layoffs.
- ▶ Short-time Compensation benefits to assist businesses reducing staff and incumbent employees faced with obtaining re-employment.

Roles and Responsibilities of Chief Elected Officials

The chief elected officials lay the foundation for the workforce system at the local level. Their purpose is to ensure the local system operates in a comprehensive, integrated, and streamlined manner that expands opportunities for all workers and businesses. Their role is to set the foundation for the local workforce development board to be strategic by ensuring fiscal integrity and ensuring the local area is represented by committed and suitable local workforce development board members. In most Florida counties a County Commissioner or Mayor is designated as the chief elected official for purposes of carrying out the duties described in the Workforce Innovation and Opportunity Act.

Pursuant to WIOA sec. 3(9), the chief elected official is the chief elected executive officer of a unit of general local government in a local area and, in a case in which a local area includes more than one unit of general local government, the representative(s) under the agreement (interlocal, consortium, and other agreements that specifies the respective roles.

The roles and responsibilities of chief elected officials are divided into four categories:



Appoint/Select Functions

Appointment and Selection functions are exactly as the name describes. Functions within this category require the chief elected officials to appoint or select a person or entity to perform a critical function within the local workforce development area on which the remainder of the system is built.

I. Select a Chief Local Elected Official

The chief local elected official is selected from among the chief elected officials to represent them and make decisions on their behalf. The chief local elected official serves as the designated signatory for various documents associated with the local workforce development area. The law gives specific duties to the chief local elected official; however, it is expected that the chief local elected official operates within authority given by the broader group of chief elected officials. The Interlocal Agreement must outline the process for designating the chief local elected official and the decisions and actions the chief local elected official can make on behalf of the chief elected officials. Also, any time there is a change in the chief local elected official, written notice must be sent to the Florida Department of Economic Opportunity as soon as possible. It is noted that within Florida there are various ways in which chief elected officials are structured. Where a consortium model exists, all of the chief elected officials are fulfilling the roles identified for the chief local elected official.

II. Appoint Local Workforce Development Board Members

The chief local elected official appoints members to the local workforce development board after a nomination process. The local workforce development board is intended to be an entity that in collaboration with economic development, local government, education and other stakeholders represents the labor market within the local workforce development area. The overall purpose of the local workforce development board is to develop and implement a strategic vision for the workforce system; thus, ensuring the right composition of local workforce development board members from key sectors determines the success of the board. It is critical that individuals appointed to the local workforce development board are qualified to lead and comply with the mandated requirements of board membership.

Categories of Membership

Local workforce development board members are champions of the system, visionaries, advisors, change agents and custodians of the local workforce development system. As members of the local workforce development board, they act with full authority and responsibility to develop policies for the operation of the Board, to monitor its financial and

programmatic performance, and to connect the local area with the resources required to meet the needs of the businesses and job seekers.

When a local workforce development board member (including the chief elected official) can no longer serve in the capacity described in the category of their membership (death, retirement, voted out of office, demotion, change of position, new career, etc.) they are supposed to notify the Chair and Chief Elected Official who appoints someone to fill the vacancy.

Business Representatives

- ▶ **Must** be 51% of the board
- ▶ **Must** be owners, chief executives or operating officers of businesses with optimum policymaking or hiring authority
- ▶ **Must** provide employment in in-demand industry sectors or occupations in the local area
- ▶ Two of the seats **must** be filled by small business
- ▶ Members are nominated by local business organizations and trade associations

Workforce Representatives

- ▶ **Must** be 20% of the board
- ▶ **Must** include representatives of labor organizations nominated by local labor federations or by other representatives of employees
- ▶ **Must** include a member of a labor organization or a training director from an apprenticeship program
- ▶ *May* include a member of a community-based organization with expertise in working with veterans or individuals with disabilities
- ▶ *May* include a member of an organization with expertise in serving eligible youth and out of school youth

Education and Training Representatives

- ▶ **Must** include a representative of adult education
- ▶ **Must** include a representative from higher education providing workforce investment activities including community colleges
- ▶ *May* include representatives of local educational agencies and community-based organizations with expertise in serving individuals with barriers to employment

Government Representatives

- ▶ **Must** include a member from economic and community development entities
- ▶ **Must** include a member from the state employment service under the Wagner-Peyser Act
- ▶ **Must** include a representative from Vocational Rehabilitation
- ▶ **May** include a member from agencies running transportation, housing, or public assistance programs
- ▶ **May** include a member from philanthropic organizations

Nomination of Members¹⁵

- ▶ Business representatives must be nominated by local business organizations or business trade associations.
- ▶ Labor representatives must be nominated by local labor federations.
- ▶ When there is more than one local area provider of adult education services or multiples higher education institutions providing workforce activities, nominations must be solicited from those providers and institutions. This requirement provides for a representative selection process for these membership categories.

III. Create Initial By-laws for the Local Workforce Development Board¹⁶

With chief elected officials being responsible for the local board member nomination process, the chief elected officials are also responsible for the initial bylaws for the board. Within these bylaws, the chief elected officials will make the determination for the initial size of the board. The by-laws, at a minimum, must address the following:

- ▶ Nomination process used by chief local elected official to select local workforce development board members.
- ▶ Term limits and how terms are staggered.
- ▶ Process and timeline to notify the chief local elected official of a vacancy.
- ▶ Reappointment process
- ▶ Designation of a proxy or alternate.
- ▶ Determination on use of technology such as phone and web-based meetings.
- ▶ Process to ensure the convening of system stakeholders, brokering relationships with a diverse range of employers, and leveraging support for workforce activities.
- ▶ Description of any other conditions governing appointment or membership on the board as deemed appropriate by the chief local elected official.

¹⁵ [Training & Employment Guidance Letter 27-14](#)

¹⁶ [Career Source Florida Administrative Policy Local Workforce Development Area and Board Governance](#); [Strategic Policy 2020.06.04.A.2 State Workforce Development Board Roles and Responsibilities](#); and [2018.09.26.A.1 CareerSource Florida Ethics and Transparency Policy](#)

- ▶ Conflict of Interest statements as well as provisions for penalties, sanctions or other disciplinary actions for direct violations of the local workforce development board Conflict of Interest policy.
- ▶ Affirm compliance with Florida's Sunshine Laws
 - ▶ Describe how public records are stored and made available in compliance with Chapter 119 Florida Statutes.
- ▶ Recognize the local workforce development board has the authority to hire its staff.
- ▶ Define a quorum.
- ▶ Permit the establishment of standing committees:
 - ▶ Standing committees do not have to be comprised exclusively of board members. Committees can be convened to focus on a particular topic or initiative and be made up of subject-matter experts in the region.

IV. Appoint a Fiscal Agent

Flow of Funds

Understanding the flow of funds and the role of each entity within that flow is critical to the successful leadership of the local workforce development board. The funds awarded to a local area start at the US Department of Labor, flow to the state workforce agency (Department of Economic Opportunity), then to the grant sub-recipient. The chief local elected official is, by law, the grant sub-recipient; however, the chief local elected official may designate an entity to serve as the grant sub recipient or fiscal agent. If an alternate grant sub-recipient or fiscal agent is not designated, the chief local elected official's unit of government shall fulfill the role.

Designation of a fiscal agent does not relieve the chief elected officials of liability for misuse of grant funds.

Once the chief local elected official has selected an entity to serve as the grant sub recipient or fiscal agent, a written agreement outlining the roles and responsibilities of the fiscal agent, chief local elected official, and the local workforce development board must be established. It should be noted within the Agreement that the local workforce development board provides direction to the fiscal agent for the expenditure of funds.

Functions of a Fiscal Agent

- ▶ Receive funds
- ▶ Ensure sustained fiscal integrity and accountability for expenditures of funds in accordance with Office of Management and Budget (OMB) circulars, Workforce Innovation & Opportunity Act and its corresponding regulations, and State policies
- ▶ Respond to audit financial findings
- ▶ Maintain proper accounting records and adequate documentation
- ▶ Prepare financial reports

- ▶ Provide technical assistance to contractors regarding fiscal issues
- ▶ At the direction of the local workforce development board, the fiscal agent may also-
 - ▶ Procure contracts or obtain written agreements.
 - ▶ Conduct financial monitoring on service providers.
 - ▶ Ensure independent audit of all employment and training program.

To be a fiscal agent, the organization must be able to-

- ▶ Receive federal dollars and
- ▶ Fulfill all required functions listed below and any functions that may be added.

While the chief local elected official designates the fiscal agent, it is the local workforce development board that will guide the functions of the fiscal agent. The fiscal agent only has authority to do what it is contracted to do. The fiscal agent does not oversee the local workforce development board or the board staff.

Review and Approve Functions

The functions within the Review and Approve category relate to tasks that other entities will perform that will need your approval to proceed. For some tasks, the role of the chief elected officials is simply to provide comment. For other tasks, your perspective regarding services is critical to the local workforce development board's success. It should be noted, as well, that within the Review and Approve category, there are tasks that involve how funds are spent by the local workforce development board. Note that chief elected officials share liability for the use of funds; therefore, your approval is critical in these decisions.

I. Approve Local Workforce Development Board Budget



The local workforce development board must develop a budget based on needs of the workforce system customers (both business and individual) in the local area. The budget must be consistent with the local plan, which is the document that outlines what services are provided and how. The budget must, also, include Infrastructure Funding Agreement for the local system. The Infrastructure Funding Agreement outlines how partners will share costs within the local system, such as rent, utilities, or equipment within one-stop centers.

Annually, the chief elected officials will collaborate with the local workforce development board to approve the budget. All funds awarded to the board must be budgeted and allocated. While a fiscal agent may be designated to receive the funds, it is the chief elected officials and local workforce development board who have the responsibility for determining how the funds are used to meet the needs of the customers in the local area.

- ▶ The budget must be consistent with the local plan.
 - ▶ The local plan is the document that describes the strategy for providing workforce services.
- ▶ The budget must include the Infrastructure Agreements for the one-stop system.
 - ▶ Infrastructure Funding Agreements outline how the core and required partner agencies share costs within each center and local system.

II. Approve One-Stop Operator Selection



The One-Stop Operator must be competitively procured, at a minimum, every four years.¹⁷ The local workforce development board is responsible for the procurement process and the selection of the One-Stop Operator. Florida's guidance for this requirement is in CareerSource Florida's [Administrative Policy 097: One-Stop Operator Procurement](#).

The primary responsibility of the One-Stop Operator is to coordinate all activities and functions performed by the various one-stop partners and to ensure that services provided are fully integrated and of the highest quality. Generally, these functions include:

- ▶ Job search, placement, recruitment, and labor exchange services
- ▶ Local, regional and national labor market information
- ▶ Training services
- ▶ Employment and training activities
- ▶ Employer/business services

Additionally, the One-Stop Operator is responsible for coordinating system related functions and activities, such as:

- ▶ Providing performance and cost information for training per program per provider
- ▶ Sharing information about local workforce area performance and One-Stop system performance
- ▶ Overseeing information, referral, and coordination of activities with other programs and services that may be within or outside of the One-Stop system
- ▶ Regularly evaluating the One-Stop system to identify opportunities for innovation and improvement.
- ▶ Bringing One-Stop partners together to develop new strategies and solutions
- ▶ Sharing data and best practices to drive system performance
- ▶ Developing and implementing operational policies and procedures for the One-Stop system

Functions the One-Stop Operator is not permitted to perform include:¹⁸

- ▶ Convene system stakeholders to assist in the development of the local plan
- ▶ Prepare and submit local plans
- ▶ Oversee itself
- ▶ Manage or significantly participate in the procurement process for One-Stop Operators

¹⁷ [20 CFR 678.605\(a\)](#)

¹⁸ [20 CFR 678.620\(b\)\(1\)](#)

- ▶ Select or terminate One-Stop Operators or service providers
- ▶ Negotiate local performance measures
- ▶ Develop or submit the local board's budget

III. May Approve Local Workforce Development Board to be the One-Stop Operator

The local workforce development board, with the approval of the chief local elected official and the Governor, may be selected as the One-Stop Operator through either a competitive procurement or a sole source determination (when consistent with state policy)¹⁹. Regardless of the procurement process utilized, local workforce development boards must prepare written documentation outlining the process²⁰. The possibility of a local board serving as the One-Stop Operator does not waive the requirement for competitive procurement.

If the local board plans to compete for the role of One-Stop Operator, the local board must have appropriate firewalls and conflict of interest policies and procedures in place.²¹ The best practice is to have an independent and separate entity run the entire procurement process. This could be done via a contract (this is an allowable expense) for the state workforce board or state agency to conduct the procurement process.²²

IV. Approve Memorandum of Understanding and Infrastructure Funding Agreement



The Workforce Innovation & Opportunity Act requires each local board, with the agreement of the chief lead elected official, to develop and execute a memorandum of understanding with required partners on the operation of the one-stop delivery system in the local service delivery area.

The memorandum of understanding addresses the operation of the one-stop delivery system in the local area and must include:

- ▶ A description of services provided through the one-stop system, including how services are coordinated and delivered.
- ▶ Agreement on funding the costs of the system, including funding for infrastructure costs.
- ▶ Methods for referring individuals between partner programs.
- ▶ Methods to ensure the needs of job seekers, youth, and individuals with disabilities are addressed by the system.
- ▶ Duration of the MOU and procedures for amending it. Reasons for amendment include changes in infrastructure cost contributions, changes in chief elected official, local workforce development board, and one-stop partner signatories.

¹⁹ [20 CFR 678.610](#)

²⁰ [20 CFR 678.605\(d\)](#)

²¹ [20 CFR 678.615\(a\)](#)

²² [Training and Employment Guidance Letter 15-16](#)

- ▶ Assurance the memorandum of understanding is reviewed at least once every three years.
- ▶ Signatures from local board, one-stop partners, and chief local elected official.

Infrastructure Funding Agreement

Under the Workforce Innovation & Opportunity Act and consistent with the Uniform Guidance, funding provided by the one-stop partners to cover the operating costs, including infrastructure costs and additional costs, of the one-stop delivery system must be based on the partner program's proportionate use of the system and relative benefit received. Each local board must include an infrastructure funding agreement in the memorandum of understanding with required partners. The infrastructure funding agreement details how infrastructure costs for the one-stop delivery system will be funded in the local area.

Local workforce development boards and career centers are expected to act in good faith and negotiate infrastructure costs and additional costs of operating a local one-stop delivery system in a transparent manner.

The infrastructure funding agreement is the financial plan to fund the services and shared operating costs of the local one-stop delivery system. Joint funding is an essential foundation for an integrated service delivery system and necessary to develop and maintain high standards of service. Infrastructure costs of one-stop centers are non-personnel costs that are necessary for the general population of the one-stop center including:

- ▶ Rental of the facilities
- ▶ Utilities and maintenance
- ▶ Equipment (including assessment-related products and assistive technology for individuals with disabilities) and
- ▶ Technology to facilitate access to the one-stop center, including technology used for the center's planning and outreach activities.

[Memorandum of Understanding and Infrastructure Funding Agreement Policy](#)

V. Approve Non-Mandatory One-Stop Partners



The one-stop partners referenced earlier are federally mandated to participate in the one-stop system. Other entities with a similar mission could also be a part of the system and participate fully. Such inclusion of additional, or non-mandatory, partners is based on approval by the local workforce development board and the chief local elected official. It is expected that you know your community best and know if an organization is an asset to the vision of the one-stop system. A non-mandatory partner organization may express interest in joining the system or you may reach out to an organization based on an identified need or lack of existing resources.

Should a non-mandatory organization seek to join the one-stop system, the organization must comply with the same requirements as the mandatory partners:

- ▶ Provide access to their programs through the one-stop system
- ▶ Use their program's funds to:
 - ▶ Provide career services
 - ▶ Maintain and jointly fund the one-stop system
 - ▶ Sign the memorandum of understanding
 - ▶ Participate in the operation of the system
- ▶ Provide representation on the local workforce development board, as required, and participate on committees of the local workforce development board, as needed.

VI. Negotiate Performance Measures



Performance measures are the method by which the U.S. Department of Labor reports to Congress on how well the workforce system is performing. Meeting performance measures is important for local workforce development boards but should not be used to drive decisions about service delivery. In other words, it is important to consider the way services are delivered and how this will contribute to positive performance outcomes, but the attainment of positive performance outcomes should not drive service delivery.

The minimum required performance measures are listed below. Performance is tracked quarterly within the state agency's reporting system and should be reported to the local workforce development board quarterly (or the frequency determined by the local board). Failure to meet performance measures can result in intervention by the state agency and lead to decertification of a local workforce development board. Additionally, successful performance is a factor in the Governor's decisions about continued designation of local workforce development areas.

The state agency, Florida Department of Economic Opportunity, negotiates the performance measures with the U.S. Department of Labor for the Adult, Dislocated Worker, and Youth funding streams. Subsequently, the state agency negotiates performance measures with each local workforce development area.

#	Primary Indicator of Performance	Description
1	Employment Rate	Percentage of participants in unsubsidized employment during the second quarter after exit from the program. Youth may substitute unsubsidized employment with participation in education or training activities.
2	Employment Rate	Percentage of participants in unsubsidized employment during the second quarter after exit from the program. Youth may substitute unsubsidized employment with participation in education or training activities.
3	Median Earnings	The median earnings of participants in unsubsidized employment the second quarter after exit.
4	Credential Attainment Rate	Percentage of participants who obtain a post-secondary credential, high school diploma or recognized equivalent, or GED during the participation in or within one year after exit.
5	Measurable Skills Gain	Percentage of participants in an education or training program leading to a post-secondary credential or employment AND who are achieving measurable skills gains toward such a credential or employment.
6	Effectiveness in serving employers	Retention with same employer, repeat business customer, employer penetration rate.

Refer to CareerSource Florida's [Administrative Policy 088: Negotiated Local Levels of Performance Requirements](#) for state guidance on local performance negotiations

VII. May Approve Local Workforce Development Board to be the Adult/Dislocated Worker Career Services Provider



With the approval of the chief local elected official and the Governor, the local workforce development board may be selected as the career services provider for adults and dislocated workers.²³ The career service provider operates the Adult and Dislocated Worker program on behalf of the local board and makes services available within the one-stop system in the local workforce area.

An organization that has been selected or otherwise designated to perform more than one of the following roles - fiscal agent, local workforce development board staff, One-Stop Operator, and direct provider of services - must develop a written agreement with the local workforce development board and chief local elected official to clarify how the organization will carry out its responsibilities in compliance with WIOA, corresponding regulations, OMB circulars, and the state's conflict of interest policy.²⁴

As has been mentioned, when an entity is selected to perform more than one role at the local level, sufficient firewalls must be in place to ensure that entity can perform all responsibilities free of conflict of interest. This applies to any and all organizations. While it is not required, local boards are strongly encouraged by the U.S. Department of Labor to competitively procure the career services provider. In such a procurement situation, if the local workforce development board seeks to be selected as the provider, steps must be taken to ensure a fair and competitive procurement process occurs.

VIII. Comment on State Plan



Under the Workforce Innovation & Opportunity Act, the state workforce development board and its partners must create a workforce development plan, every four years with modifications ever two years, that describes its overall strategy for workforce development and how it is implemented to meet the skill needs of employers and jobseekers. States should use their plans to explain how the Workforce Innovation & Opportunity Act's core programs, along with other state and federal programs,

²³ [20 CFR 679.410\(b\)](#)

²⁴ [20 CFR 679.430](#)

will work together to support the mission and vision – beyond minimal compliance but with innovation in addressing skill gaps across the state. States must provide opportunities for authentic input from a broad variety of stakeholders to ensure the plan is informed by those who will implement it and by those intended to benefit from it.

The purpose of the [State Plan](#) is to provide the framework for how the state will outline a strategic vision and goals for the workforce development system which:

- ▶ Strategically aligns programs within the workforce system:
 - ▶ Unified Plan focuses on six core programs.
 - ▶ Combined Plan focuses on six core programs plus other partners.
- ▶ Directs investments in economic development, education, and workforce programs.
- ▶ Applies strategies for job-driven training consistently across federal programs.
- ▶ Enables economic, education, and workforce partners to build a skilled workforce through innovation and program alignment.

The state must provide opportunity for public comment on and input into the development of the State Plan prior to its submission. Opportunity for input must be given to representatives of-

- | | |
|--|------------------------------------|
| ▶ Local workforce development boards | ▶ Community based organizations |
| ▶ Chief elected officials | ▶ Adult education providers |
| ▶ Businesses | ▶ Institutions of higher education |
| ▶ Representatives of labor organizations | ▶ Other stakeholders |
| | ▶ General public |

High-Level Oversight Functions

High-Level Oversight refers to the tasks of management and governance which chief elected officials will perform, along with the local workforce development board, to ensure the system operates efficiently and correctly. “High-level” indicates that the chief elected official role is not to be in the day-to-day operations of running a one-stop center or a Workforce Innovation & Opportunity Act funded program.

I. Assume Liability for Funds

Per federal law, a local workforce development area is multi-jurisdictional, the chief elected officials must execute an agreement that specifies how the chief elected officials will share in the liability for funds. Additionally, in Florida, it is expected that the chief elected officials in each local workforce development area will have a written governing agreement which will, at a minimum, address-

- ▶ Identification of local workforce development area
- ▶ Designation and responsibilities of the chief local elected official, if applicable
- ▶ Establishment, appointment, and operation of the local workforce development board
- ▶ Designation and responsibilities of the fiscal agent
- ▶ Process for chief elected officials to provide input on critical decisions
- ▶ Apportionment of financial liability
- ▶ Performance accountability
- ▶ Dispute resolution process

Chief elected officials are liable in their official capacity but not personally liable for the misuse of the Workforce Innovation & Opportunity Act funds.

Additionally, the written agreement should detail the process for reconciling disallowed costs. In most cases, liability for disallowed costs rests with the entity responsible for incurring the cost. In the event the entity responsible cannot or will not assume the liability, this written agreement between chief elected officials must provide the process for how funds are reimbursed.

- ▶ For an expenditure (or group of expenditures) to be deemed “disallowed,” an audit process or compliance monitoring process has occurred. In both situations, there are steps designed to resolve the issue prior to actual repayment.
- ▶ Should repayment be necessary, it must be done with non-federal dollars. Repayment is made to the Florida Department of Economic Opportunity or the U.S. Department of Labor.
- ▶ It is critical that contracts issued by the local workforce development board (or on behalf of the local board) using the Workforce Innovation & Opportunity Act funds include strong language

regarding disallowed costs and include clear delineation of roles and responsibilities regarding the contract activities/services.

Common methods for apportioning costs

- ▶ Equal distribution based on number of counties.
- ▶ Population-based formula – the more populated counties would provide a greater share of the financial costs.
- ▶ Expenditures – the percentage of funds that have been expended to the benefit of residents per county. The county with the individuals who have accessed more services from the workforce system would share more of the cost.

II. Conduct Oversight of the Local System and Adult, Dislocated Worker, & Youth Programs



In partnership with the local workforce development board, the chief elected officials are tasked with providing oversight of the one-stop delivery system in the local area as well as oversight of the Adult, Dislocated Worker, and Youth programs. Joint oversight by the two groups ensures the system is accomplishing the vision set forth by the Workforce Innovation & Opportunity Act and its corresponding regulations.

One-Stop System

The vision cast by the local board is expected to be a wide net encompassing all partner programs within the system. While each program is unique and must fulfill its regulatory requirements, all programs work toward the same vision set forth by the state and local board.

It may be necessary to set policy for the one-stop delivery system as it relates to things such as (not intended to be an exhaustive list):

- ▶ Targeted sectors or occupations
- ▶ Customer service and customer flow within the one-stop centers
- ▶ Unified business services teams

Other times the state workforce development board and/ or the Florida Department of Economic Opportunity may require local boards to set specific policies.

For more information on the One-Stop System, refer to the [Overview of Local One-Stop System](#) section of this guide.

Adult, Dislocated Worker, and Youth Programs



Additionally, chief elected officials, in partnership with the local workforce development board, share oversight for the Workforce Innovation & Opportunity Act Adult, Dislocated Worker, and Youth funding streams and must determine the appropriate mix of Adult and Dislocated Worker services to provide²⁵ in the local area. The oversight provided to these specific programs should align with the oversight and guidance given to the overall one-stop system. As such, it is necessary for the local board and chief elected officials to establish policies specific to the Adult, Dislocated Worker, and Youth programs. Some policies which must be developed are listed below; however, additional policies established at the state level, as well as those addressing local board specific goals, should also be documented. A few policies (not an exhaustive list) required by the Workforce Innovation & Opportunity Act include-

- ▶ Determine documentation requirements for providing training services without first providing career services.
- ▶ Determine when follow-up services must be provided to adults and dislocated workers.
- ▶ Develop a policy on self-sufficiency wage for use with On-the-Job Training contracts for eligible employed workers.
- ▶ Determine criteria for an On-the-Job Training contracts.
- ▶ Determine criteria for an employer to be eligible to receive local incumbent worker training.
- ▶ May establish limits on the provision of supportive services.

²⁵ [20 CFR 680.140 \(a\)](#)

Chief Elected Officials provide effective oversight and governance of the workforce system by:

- ▶ Selecting a fiscal agent with robust procurement processes for the awarding of contracts.
- ▶ Executing contracts with clear performance metrics and outcomes expectations.
- ▶ Ensuring fiscal agent establishes proper fiscal controls and auditing procedures.
- ▶ Ensuring local workforce development board staff effectively monitor all contracts on a regular basis and expect to see monitoring reports from the staff.
- ▶ Not using service providers who produce subpar results regardless of how long the provider has been in that role.
- ▶ Making decisions based on the best interest of the system.
- ▶ Using data to guide decision making about strategies, services, and providers.
- ▶ Being engaged.
- ▶ Embracing your role as being more than a “rubber stamp.”
- ▶ Supporting policy that creates opportunity for innovative services and which support the collective chief elected officials’ vision for the local workforce system.
- ▶ Ensuring that your involvement is at a governance and oversight level while avoiding involvement in the operations or “the weeds” of the day-to-day work.

III. State Workforce Development Board

Florida’s workforce system is led by the CareerSource Florida State Board of business and government leaders charged with guiding workforce development for the state of Florida. The state board, required under the Workforce Innovation and Opportunity Act, is supported directly by CareerSource Florida Inc., a nonprofit organization and professional team that works at the direction of its Board of Directors and with partners across the state to meet its mission. That unified mission is to connect employers with qualified, skilled talent and Floridians with employment and career development opportunities to achieve economic prosperity.

The CareerSource Florida Board of Directors includes the Governor and, currently, 25 members appointed by the Governor and legislative leaders. The board includes leaders in business and industry, government, labor, economic development, education and youth and community-based organizations whose contributions influence the development of strategies and policies, ensuring Florida has a robust, globally competitive workforce.

IV. Request Local Workforce Development Area Designation



The opportunity for chief elected officials exists on two levels- request and consultation. Chief elected officials may request designation as a local workforce development area and once a Governor is considering a redesignation request, chief elected officials must be consulted prior to the decision being made. Designation of local workforce development areas is a requirement for states to receive Adult, Dislocated Worker, and

Youth funding.

Request

After Initial Designation, the chief local elected official and local workforce development board may submit a request for Subsequent Designation. The Governor must approve the request if, for the two most recent program years, the following occurred within the local workforce development area-

- ▶ Successful on Indicators of Performance and
- ▶ Sustained fiscal integrity and
- ▶ Met regional planning requirements, if applicable.

If the chief elected officials and the local board are satisfied with the current local area configuration, the “request” to continue as a local area is assumed. This is known as a passive request which means it is implied unless otherwise stated.

Subsequent Designation

At any time, the Governor may evaluate if a local area continues to meet the requirements for designation:

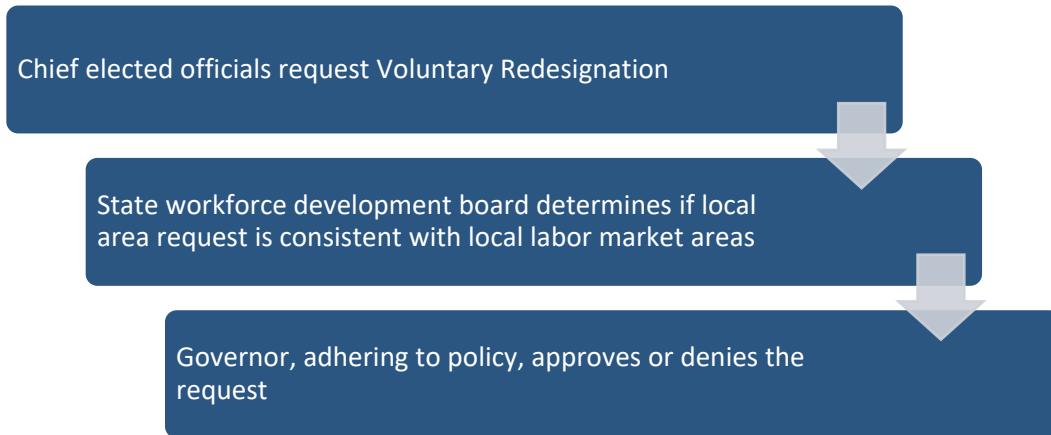
- ▶ Successful on Indicators of Performance and
- ▶ Sustained fiscal integrity and
- ▶ Met regional planning requirements, if applicable.

Through Program Year 2017 (July 1, 2017-June 30, 2018), chief elected officials and local workforce development boards could request **Initial Designation** of a local workforce development area. The Governor had to approve the request if the following applied:

- ▶ It was a local workforce area under the Workforce Investment Act which was the precursor to the Workforce Innovation and Opportunity Act **and**
- ▶ The local area performed successfully **AND** sustained fiscal integrity.

Voluntary Redesignation

At any time, chief elected officials may submit a request for designation as a local workforce development area if they are interested in modifying the existing configuration of counties of the local area. A Request for Voluntary Redesignation is made only if a change is desired. The process for Voluntary Redesignation is outlined below:



Involuntary Redesignation

An Involuntary Redesignation can occur when a local workforce development area fails to meet the requirements identified for Subsequent Designation:

- ▶ Performed successfully on Indicators of Performance.
- ▶ Sustained fiscal integrity.
- ▶ Met regional planning requirements, if applicable.

Consultation

Consultation with chief elected officials must occur when the Governor is considering a Voluntary Redesignation or an Involuntary Redesignation of the local workforce development area structure. Consultation with chief elected officials ensures that governance decisions reflect the needs of local communities and to provide a “say” in governance decisions for individuals with fiscal responsibility under the law. Before the Governor decides on the designation of local workforce development areas, chief elected officials must be consulted.

[LWDA Designation Administrative Policy](#)

V. Funds Transfer between Programs



Due to the financial liability of the chief elected officials, the law requires their input in the significant financial decisions made by the local workforce development board. Up to 100% of funds may be transferred between Adult and Dislocated Worker funding streams.²⁶ For a local board to transfer funds between the Adult and Dislocated

Worker funding streams, the chief local elected official must approve the request. If such a request is approved by the chief local elected official, the local board must notify the Florida Department of Economic Opportunity. The transfer must occur within the Florida Department of Economic Opportunity's Financial Management system in addition to the accounting system of the grant sub recipient/ fiscal agent.

VI. Consult During a Local Workforce Development Board Reorganization Process

A process of local board re-organization could arise should a local board fail to meet certification requirements or, if after meeting certification requirements, the local board fails to maintain certification. The Governor is required to certify one local workforce development board for each local workforce development area in the state every two years. Certification²⁷ is based on:

- ▶ Compliance with local board membership requirements
- ▶ The extent to which the local board has provided workforce activities that enable the local workforce development area to
 - ▶ Meet performance indicators and
 - ▶ Achieve sustained fiscal integrity.

Additionally, decertification of a local board can occur based on the following situations-

- ▶ Fraud or abuse
- ▶ Failure to carry out functions of a local workforce development board
- ▶ Failure to meet performance indicators



If the Governor decertifies a local board, the Governor may develop a Reorganization Plan which may require the appointment of a new local workforce development board. If a Reorganization Plan is developed, it must be done in consultation with the chief elected officials. If a new local board must be appointed, it is appointed by the chief local elected official and must adhere to membership and certification requirements.

²⁶ WIOA §129(4)(A-B)

²⁷ [CareerSource Florida Administrative Policy 091: Local Workforce Development Board Composition and Certification](#)

VII. Discretionary Allocation Formulas for Adult and Youth Funds



Governors, with assistance from the state workforce development board, may develop a discretionary formula for awarding additional Youth and Adult funds to the local areas.

The discretionary formula could be developed in such a way to consider key demographics or other labor market factors. Should a formula such as this be developed, the chief elected officials and local workforce development boards must be consulted in

this process.

Strategic Planning Functions



Chief elected officials and the local workforce development board engage in strategic planning to outline a vision and workforce and economic goals intentionally and purposefully for the local workforce development area. What does the local system need to do, for example, to produce more skilled workers or meet the demands of a growing industry? What are the growing industry sectors for the local area? Chief elected officials and the local board ask and answer these questions, as well as others, to determine the vision for the local system.

I. Develop, Implement, and Modify the Local Plan

Every four years, the local board, in partnership with the chief elected officials, develop a Local Plan which outlines how the local board will develop, align, and integrate service delivery strategies across programs. Broadly, the local plan must-

- ▶ Identify and describe policies, procedures, and local activities to be carried out.
- ▶ Direct investments in economic development, education, and workforce programs.
- ▶ Apply job-driven strategies in the one-stop delivery system.
- ▶ Enable partners to build a skilled and ready workforce through innovation and alignment across programs.
- ▶ Be incorporated into a regional plan, if applicable.
- ▶ Be consistent with the State Plan.

On a more detailed level, the Local Plan must outline how the local board will ensure that core programs-²⁸

- ▶ Expand access to employment, training, education, and support services.
- ▶ Facilitate the development of career pathways and co-enrollment, as appropriate.
- ▶ Improve access for individuals to obtain industry-recognized post-secondary credentials that are portable and stackable.
- ▶ The plan must also include strategies to ensure the local workforce system meets the needs of businesses in the local area and that business has the opportunity to engage with the system in meaningful ways.

The process to develop the Local Plan must include the partners and must be led by the local board. The state workforce development board and the Department of Economic Opportunity issue guidance regarding content of the plan to ensure local boards align their service strategies with that of the state board's vision and state plan. Additionally, the local plan must align with the local board budget.

²⁸ 20 CFR 679.560

II. Conduct Regional Planning, if applicable

A Regional Plan is required if the state assigns two or more local workforce development areas to a region. Local planning requirements still apply, but each Local Plan in the region must be incorporated into the Regional Plan.

A Regional Plan is a four-year action plan to develop, align and integrate service delivery strategies and resources among the multiple local areas in a given region. Regions are identified by the State to align workforce development activities and resources with larger regional economic development areas and available resources. The Regional Plan must be consistent with the vision and goals of the State Plan.

At this time, there are no Workforce Innovation & Opportunity Act defined regions within Florida. Therefore, no local workforce development boards or chief elected officials must meet this requirement.

Appendix I: Basic and Individualized Career Services

Basic Career Services

- ▶ Orientation to one-stop services
- ▶ Outreach, intake, referrals to other services (based on need)
- ▶ Job search assistance and referrals to available jobs/placement
- ▶ Assistance filing unemployment insurance claim
- ▶ Provide labor market information including but not limited to- current hiring trends, in demand jobs and industries, wages, skills and education needed for specific jobs, information on non-traditional employment
- ▶ Assessment of career interest, aptitude, basic education, English proficiency, need for supportive services
- ▶ Eligibility determination for programs with specific criteria
- ▶ Connection to other programs including, but not limited to, Medicaid, CHIP, SNAP, TANF, and transportation services
- ▶ Assistance with completing financial aid applications
- ▶ Training provider outcomes data (graduation rates, employment after graduation) and cost of training per provider
- ▶ Outcomes measurement/performance information on one-stop centers and programs at the one-stop center
- ▶ Workshops regarding skills needed to find a keep a job
- ▶ Veteran services

Individualized Career Services

- ▶ Comprehensive and specialized assessments and discussions on the results
- ▶ Development of an individualized employment plan
- ▶ Individual and group counseling
- ▶ Career planning
- ▶ Short-term soft skills and career readiness services and other workforce preparation activities
- ▶ Internships and work experience opportunities
- ▶ Assistance with completing financial aid documents and basic budget management tips
- ▶ Training for individuals with limited English proficiency

Appendix II: Youth Program

In school youth criteria

- ▶ Attending school
- ▶ Between ages 14 and 21
- ▶ Low income and one or more of the following:
 - ▶ English language learner
- ▶ Offender
- ▶ Homeless
- ▶ Foster care
 - ▶ Currently in, aged out, or age 16 and left foster care for kinship guardianship or adoption
- ▶ Pregnant or parenting
- ▶ Has a disability
- ▶ Requires additional assistance to complete an educational program or to obtain or maintain employment

Out of school youth criteria

- ▶ Not attending school
- ▶ Between the ages of 16 and 24 (at time of enrollment)
- ▶ One or more of the following:
 - ▶ Withdrew from school before obtaining a diploma or high school equivalency
 - ▶ Within the age of compulsory attendance but has not attended for the past six months
 - ▶ Has a secondary school diploma or equivalent, and
 - ▶ Is low income and
 - ▶ Basic skills deficient or
 - ▶ English language learner
- ▶ Offender
- ▶ Homeless or runaway
- ▶ Foster care
 - ▶ Currently in, aged out, or age 16 and left foster care for kinship guardianship or adoption
- ▶ Pregnant or parenting
- ▶ Has a disability
- ▶ Low income and requires additional assistance to enter or complete an educational program or to obtain or maintain employment

Appendix III: Definitions

Additional Partner – Per WIOA 121(b)(2), an entity that carries out a program not identified as required under WIOA that is approved by the local workforce development board and the chief local elected official may be included as a partner in a local area.

Adult – anyone 18 or older

Chief Local Elected Official – identified in WIOA Section 3 Definitions (9) as the chief elected officer of a unit of general local government in a local area or the individual designated under a local agreement pursuant to WIOA Section 107(c)(1)(B).

Dislocated worker – an individual who:

- ▶ has been terminated or laid off, or who has received a notice of termination or layoff
- ▶ is eligible to receive or has exhausted Unemployment Insurance Benefits or is not eligible to receive based on a reason other than significant attachment to the workforce
- ▶ is employed at a facility in which the employer has made a general announcement of closure within 180 days
- ▶ self-employed but is unemployed due to general economic conditions or natural disaster
- ▶ displaced homemaker
- ▶ spouse of an active-duty Armed Forces member and who has lost a job due to a relocation due to change in duty station

Local Workforce Development Board (LWDB) – the board created by the chief local elected official pursuant to WIOA Section 107 with responsibility for the development of the local plan and for oversight of the workforce development activities in the local area. No reference to “the Board” or “the local Board” shall be interpreted as any board other than the local workforce development board.

Performed successfully – the local workforce development area met or exceeded the levels of performance the Governor negotiated with the local board and chief local elected official for core indicators of performances and that the local workforce development area has not failed any individual measure for the last two consecutive program years in accordance with a state established definitions, provided in the State Plan, of met or exceeded performance.

Sustained fiscal integrity – the Secretary has not made a formal determination that either the grant recipient or administrative entity of the area misspent funds due to willful disregard of the requirements of the provision involved, gross negligence, or failure to comply with accepted standards of administration for the two-year period preceding the determination.

Required Partner – an entity that carries out one or more of the programs or activities identified under WIOA Section 121 (b)(1) and is required under that Section to participate in the one-stop system and to make career services under its program or activity available through the one-stop system.

WIOA – The Workforce Innovation and Opportunity Act amends the Workforce Investment Act of 1998 to strengthen the United States’ workforce development system through innovation in, and alignment

and improvement of, employment, training, and education programs, and to promote individual and national economic growth, and for other purposes.

Local Plan – Per WIOA section 108, the local plan is a comprehensive four-year plan developed by each local workforce development board, in partnership with the chief local elected official and submitted to the Governor. The plan shall support the strategy described in the State plan. At the end of the first two-year period of the four-year local plan, each local workforce development board shall review the local plan, and the local workforce development board, in partnership with the chief local elected official shall prepare and submit modifications to the local plan to reflect changes in labor market and economic conditions or in other factors affecting the implementation of the local plan. Plans identify the respective local area’s current and projected workforce investment needs, the one-stop delivery system, performance standards, and strategies to address the workforce investment needs in consideration of performance standards per WIOA Section 116.

State Plan – the term “state plan,” used without further description, means a unified State plan under section 102 or a combined State plan under section 103.



CHIEF ELECTED OFFICIALS

WORKFORCE INNOVATION & OPPORTUNITY ACT
ROLES AND RESPONSIBILITIES TRAINING

MAY 2021

WELCOME & OPENING REMARKS

Lenita Jacobs-Simmons

*Acting Deputy Assistant Secretary and Regional Administrator for
Region 3*

Employment and Training Administration

Michelle Dennard

President and CEO

CareerSource Florida

TODAY'S PRESENTERS



Lynn Bajorek

Program Manager

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Lori Collins

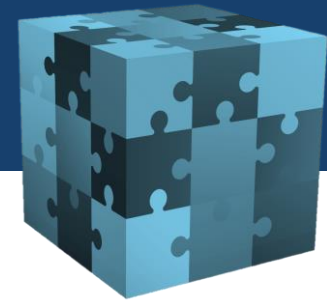
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TRAINING OBJECTIVES



- ▶ Support Chief Elected Officials' understanding of the Workforce Innovation & Opportunity Act as a tool to drive workforce and economic development in their communities.
- ▶ Helping the Chief Elected Officials understand their roles and responsibilities outlined in the law as well as the roles and responsibilities of Local Workforce Area Board Members, and board staff, and the firewalls required to prevent conflict of interest and mitigate risk to the integrity of federal funding.
- ▶ Ensure Chief Elected Officials understand key roles and responsibilities assigned to them under the law to support comprehensive oversight of the public workforce system.

AGENDA



1. The Workforce Innovation & Opportunity Act as a Tool to Drive Community Prosperity
2. Workforce Innovation & Opportunity Act Governance Structure, Role and Firewalls
3. Chief Elected Officials' Roles and Responsibilities under the Workforce Innovation & Opportunity Act
4. Questions and Answers
5. Wrap up and Next Steps

ENGAGING WITH US DURING THE SESSION

- ▶ We will have dedicated time throughout the training to answer any questions you may have.
- ▶ Please feel free to type questions in the chat at any point in the training.
- ▶ All questions are good questions!

CHIEF ELECTED OFFICIALS' GUIDE

- ▶ Outlines each function of the Chief Elected Officials.
- ▶ Today's training will cover the key functions of Chief Elected Officials.
- ▶ You are encouraged to refer to your Guide throughout today's training.

TERMINOLOGY

- ▶ There are various elected official organizational structures in Florida. If your local area uses a consortium model, the term “Chief Local Elected Official,” applies to the consortium.
- ▶ In Florida, the term local workforce development board is used synonymously with local “board of directors.”

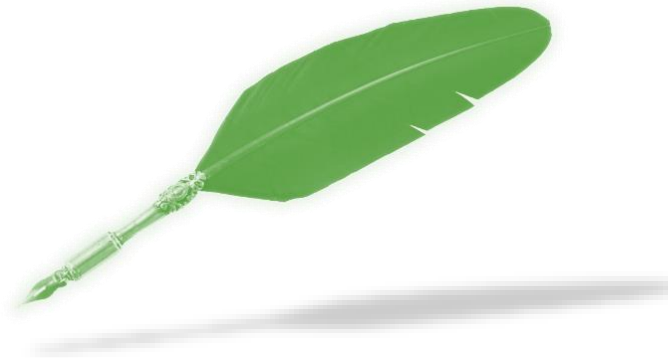


THE WORKFORCE INNOVATION & OPPORTUNITY ACT AS A TOOL TO DRIVE ECONOMIC STABILITY

WORKFORCE INNOVATION & OPPORTUNITY ACT

WORKFORCE INNOVATION AND OPPORTUNITY ACT

- ▶ Signed into law with broad, bi-partisan support on July 22, 2014
- ▶ First major workforce development legislation since the Workforce Investment Act of 1998
- ▶ Outlines the vision, goals, objectives, and requirements for how the public workforce system is structured and operates



WORKFORCE INNOVATION & OPPORTUNITY ACT VISION

Seeks to improve job and career options for our nation's workers and job seekers through an integrated, job-driven public workforce system that links diverse talent to businesses.

Supports the development of strong regional economies where businesses thrive, and people want to live and work

Based on idea that public workforce system supports development of a talent pipeline

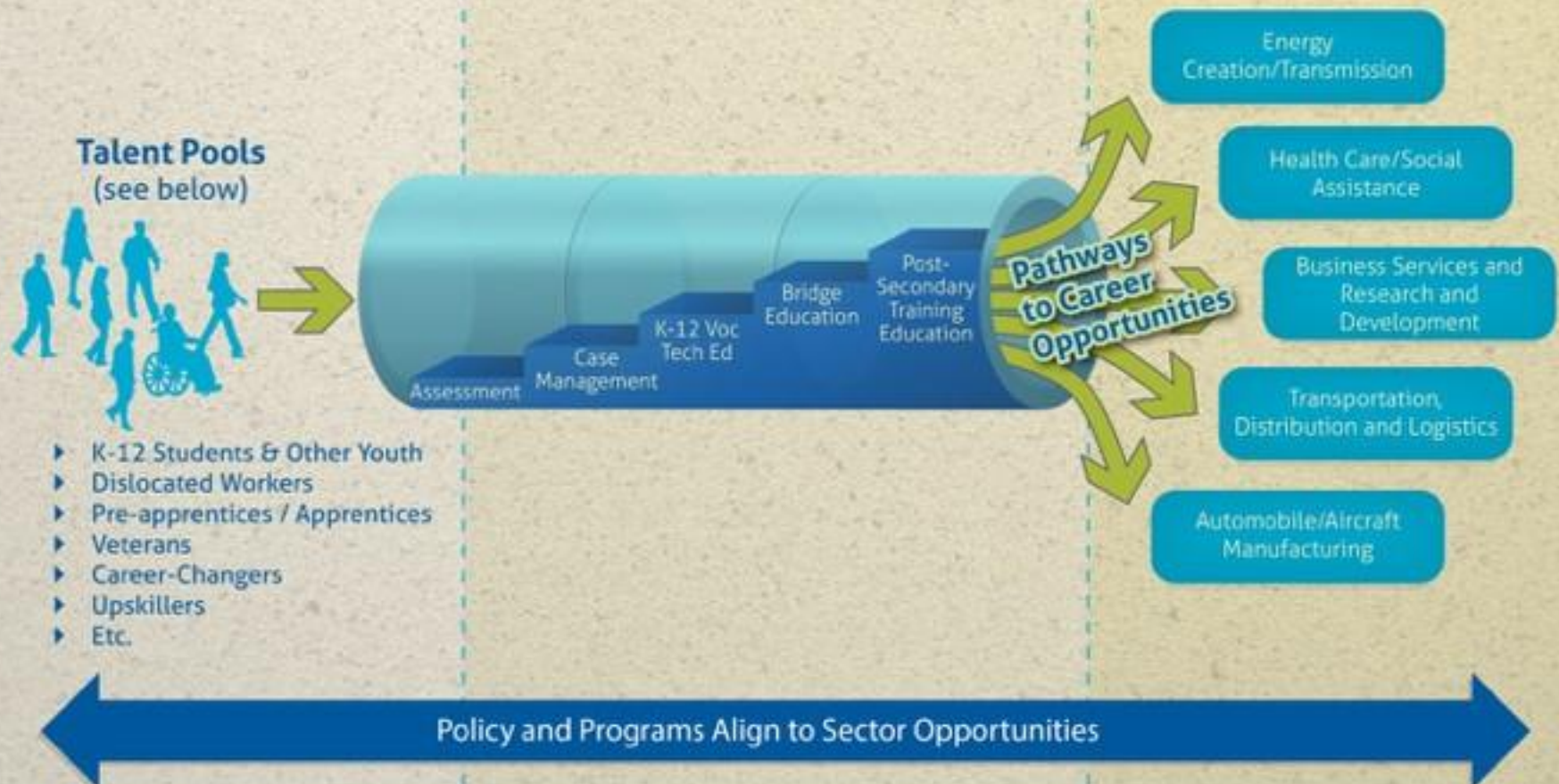
A World-Class Talent Pipeline:

The Talent Supply Chain Vision

Aggregate
Supply

Integrated, Sector-Driven
Career Development Solutions

Quantify Sector-Based
Demand



FIVE KEY PRINCIPLES

WIOA Operating Guidance



- ▶ Integrated Service Delivery
- ▶ Focus on Strategy
- ▶ Regional Economic Development
- ▶ High-Quality Services
- ▶ Accountability & Transparency

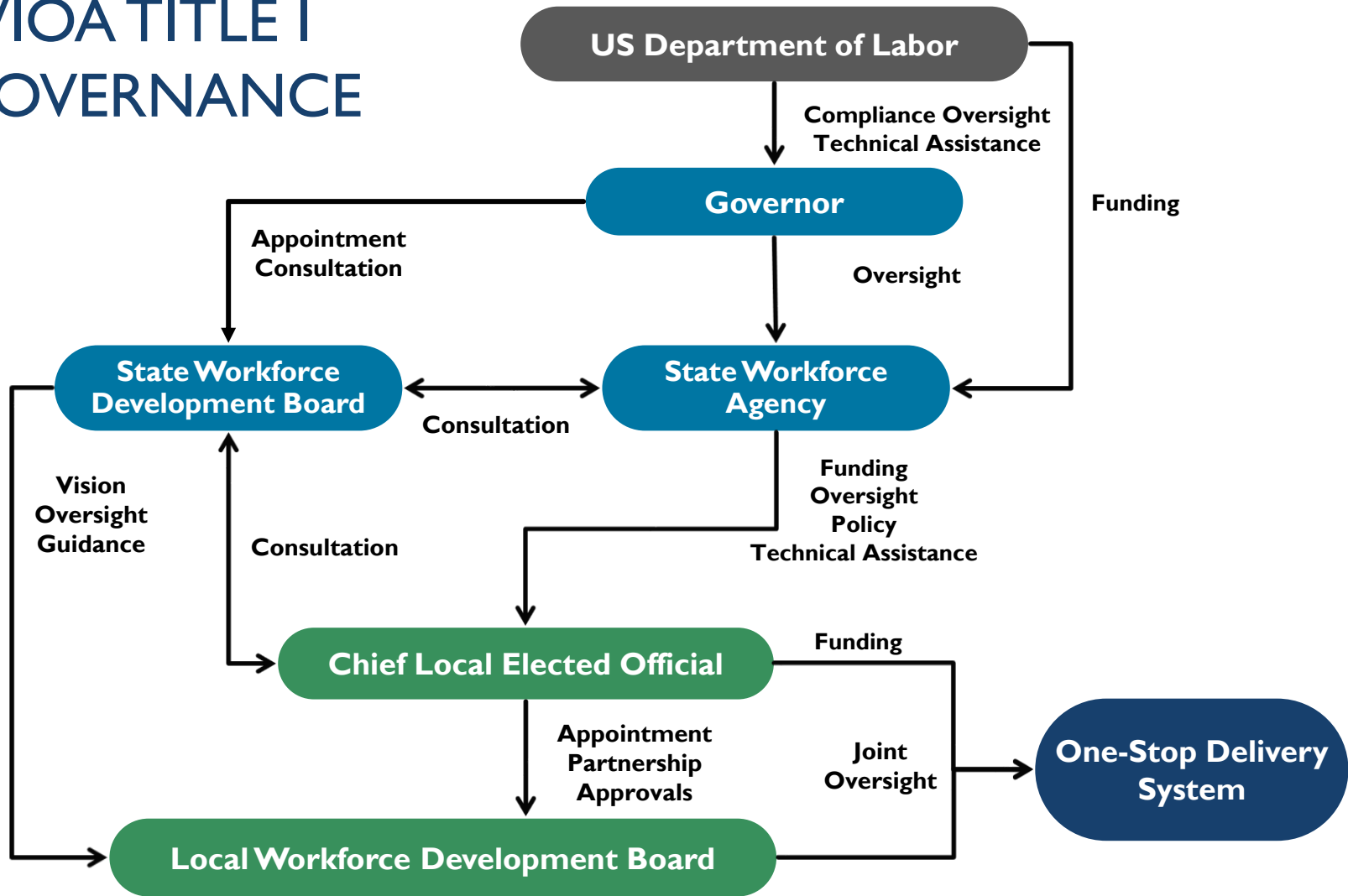
HALLMARKS OF EXCELLENCE





WORKFORCE INNOVATION & OPPORTUNITY ACT GOVERNANCE STRUCTURE, ROLES AND FIREWALLS

WIOA TITLE I GOVERNANCE



US DEPARTMENT OF LABOR EMPLOYMENT AND TRAINING ADMINISTRATION

- ▶ Federal agency that administers the Workforce Innovation & Opportunity Act Title I program and grants funding to states
- ▶ Mission: To contribute to more efficient functioning of U.S. labor market by providing high-quality job training, employment, labor market information, and income maintenance services primarily through state and local workforce development systems
- ▶ National Office and six Regional Offices
 - Federal Project Officers work directly with states to conduct monitoring/oversight and provide technical assistance

GOVERNOR

- ▶ Official Workforce Innovation & Opportunity Act grant recipient
- ▶ Designates a State Workforce Agency to receive and administer the funding on his/her behalf
 - Department of Economic Opportunity
- ▶ Appoints members to the CareerSource Florida Board of Directors following criteria outlined in the law
 - CareerSource Florida
 - Board
 - Staff

STATE WORKFORCE AGENCY

- ▶ The Florida Department of Economic Opportunity is the state workforce agency
 - Grants local Workforce Innovation & Opportunity Act funding to Chief Elected Officials (or the fiscal agents designated to receive it)
 - Provides subject matter expertise to the state workforce development board / CareerSource Florida (along with other key state partner agencies)
 - Develops policy and guidance for the local system
 - Monitors implementation of the Workforce Innovation & Opportunity Act program for compliance and effectiveness
 - Provides technical assistance and training to support effective implementation

STATE WORKFORCE DEVELOPMENT BOARD – CAREERSOURCE FLORIDA

Appointed by the Governor to oversee implementation and continuous improvement of the state workforce system.



Purpose is to convene state, regional and local partners to:

Enhance the
capacity of the
system

Align and
improve program
outcomes

Promote
economic
growth

Engage
businesses and
other
stakeholders

Support
achievement of
the state's vision
and goals

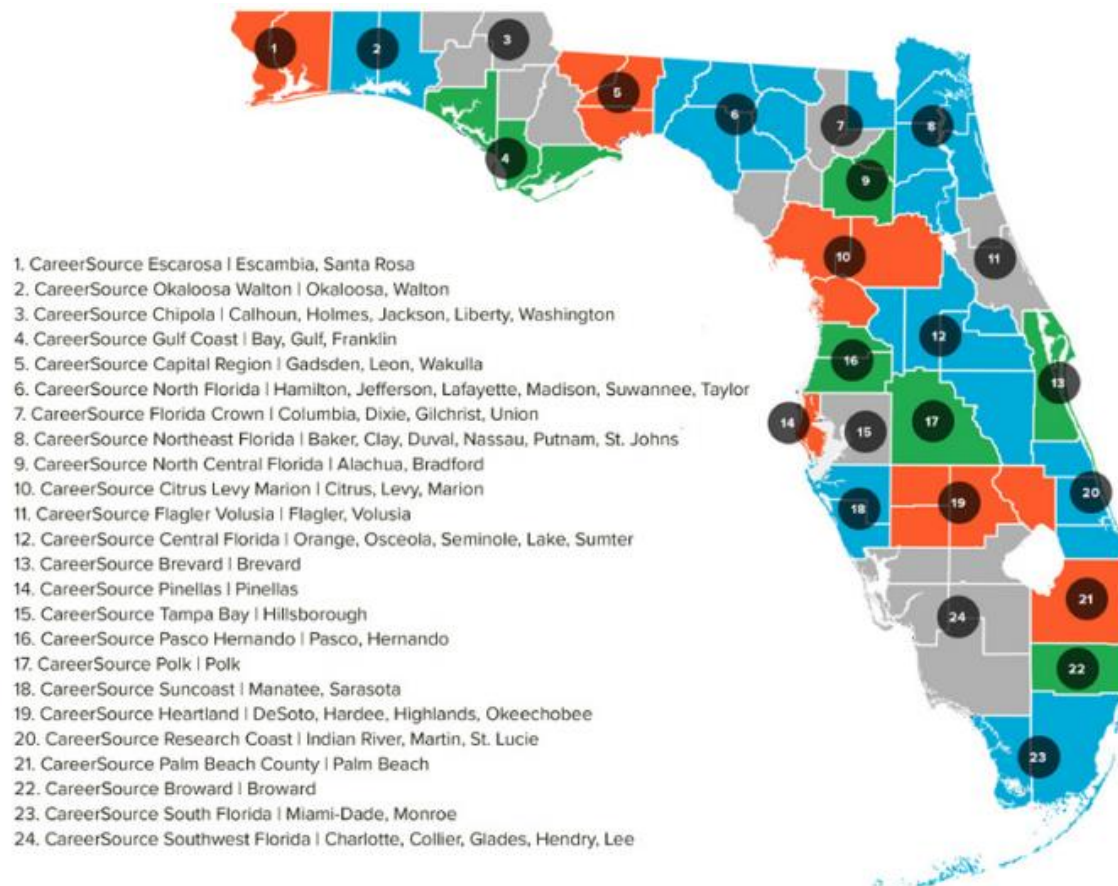
CHIEF ELECTED OFFICIALS

- ▶ Chief elected official is the head of a unit of local government
- ▶ Significant responsibility and opportunity to shape the local system and use it as a tool to drive community prosperity
- ▶ Sets the foundation which allows the local workforce development board to be strategic and visionary

LOCAL WORKFORCE DEVELOPMENT AREA

- ▶ Local workforce development areas are designated by the Governor after taking into consideration:
 - Local labor markets
 - Regional economic developer areas
 - Area resources and capacity
- ▶ Local workforce development board publishes a Workforce Innovation & Opportunity Act local plan outlining vision, goals, strategies and investments for the area.

LOCAL WORKFORCE DEVELOPMENT AREAS



LOCAL WORKFORCE DEVELOPMENT BOARD

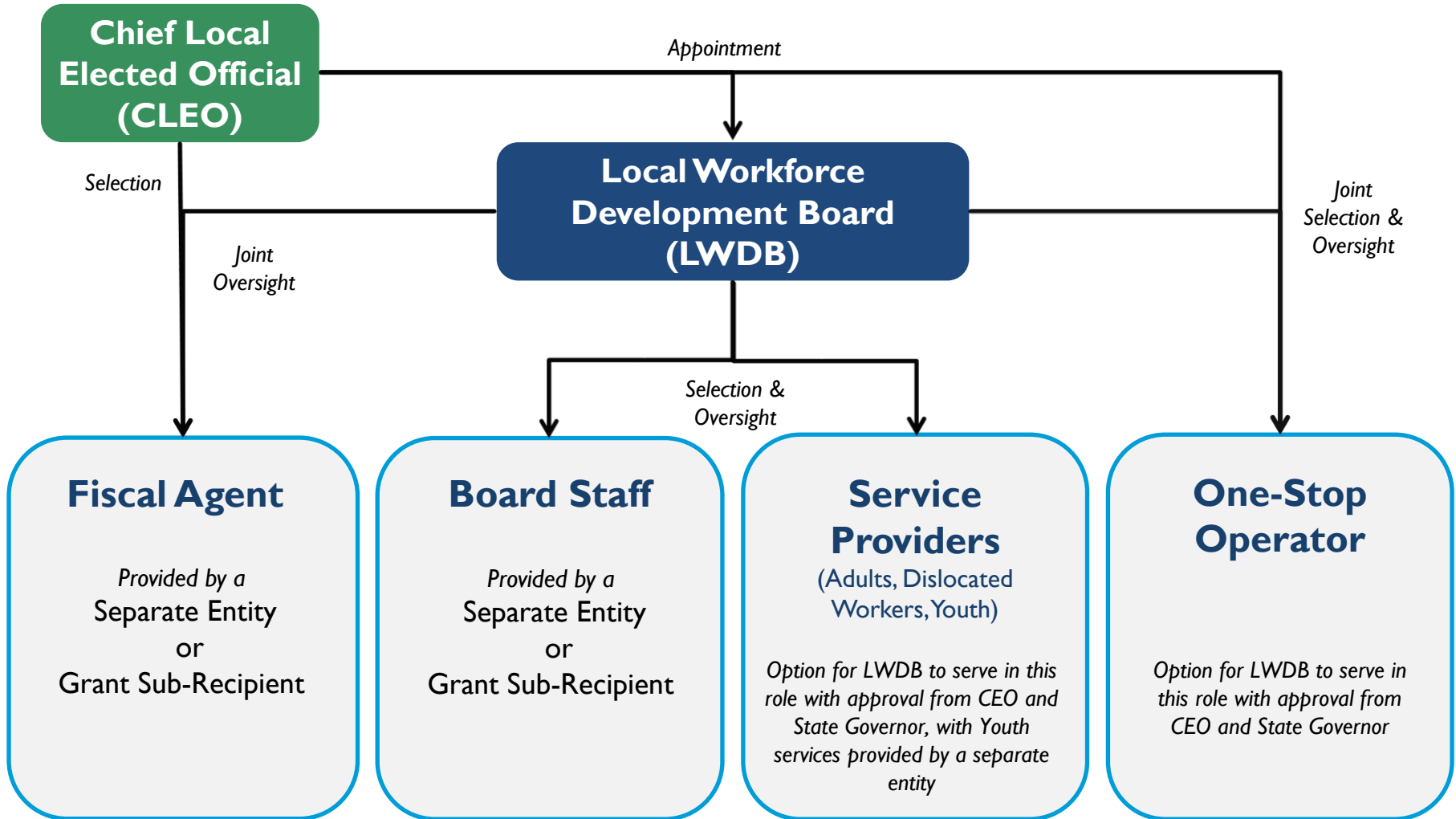


- ▶ Appointed by Chief Local Elected Official
- ▶ Serves as the strategic leader and convener of workforce development system stakeholders in the local area
- ▶ Majority of members represent business
 - Board Chair must represent business
- ▶ Partners with employers and the workforce system to develop local Workforce Innovation & Opportunity Act plan, policies and investments that drive the vision for economic prosperity.

AMERICAN JOB CENTERS

- ▶ Physical centers where job seeker and business customers access employment and training services
 - Career Source Florida
 - Referred to as career centers
- ▶ Designed to provide a full range of assistance under one roof (and virtually)
 - Job seeking customers
 - Business customers
 - Staff may travel to meet at place of businesses but job fairs, applicant screening, sector meetings may also happen at local career centers

LOCAL WORKFORCE SYSTEM OVERSIGHT



ROLE OF THE FISCAL AGENT

In general, the fiscal agent is responsible for the following functions:

- ▶ Receive funds
- ▶ Ensure sustained fiscal integrity and accountability for expenditures in accordance with Office of Management and Budget, Workforce Innovation & Opportunity Act and its corresponding regulations, and state policies
- ▶ Respond to audit findings
- ▶ Maintain proper accounting records and adequate documentation
- ▶ Prepare financial reports
- ▶ Provide technical assistance to sub-recipients regarding fiscal issues

LOCAL WORKFORCE DEVELOPMENT BOARD STAFF

- ▶ The local workforce development board sets the vision, determines priorities, and creates action plans for workforce staff to implement.
 - Local workforce development board staff operationalize the vision through partnerships, strategies, and programs.
 - They serve as project managers for executing on the board's vision and priorities and report back to the board on progress.
- ▶ Staff must be led by the local workforce development board of directors. The board should not be led by the staff.

SERVICE PROVIDERS

Deliver front-line services to customers, typically through American Job Centers

Engaged through a contract with the administrative entity to provide services such as:

- Case management
- Assessment
- Job search assistance
- Training referrals

Play a role in implementing the vision, goals and strategy laid out by the local workforce development board in the Workforce Innovation & Opportunity Act local plan

ONE-STOP OPERATOR



Organization (or consortium) procured to coordinate service delivery of partners and service providers



May provide some services or be the primary provider of services



Prohibited from performing certain functions



Does not have a role in developing local plan, but **does** have a role in operationalizing the vision, policy and strategies defined by the LWDB

WHAT QUESTIONS DO YOU HAVE?





CHIEF ELECTED OFFICIALS

ROLES AND RESPONSIBILITIES

KEY CHIEF ELECTED OFFICIAL RESPONSIBILITIES



Determine how to share financial liability



Designate a Grant Sub Recipient or Fiscal Agent



Appoint local workforce development board members



Review and approve for key Workforce Innovation & Opportunity Act provisions



FINANCIAL LIABILITY OPPORTUNITY

- ▶ Liability for the Workforce Innovation & Opportunity Act funding is not without the opportunity to oversee and approve how and by whom the funds are spent.

FINANCIAL LIABILITY

- ▶ Chief Elected Officials bear financial liability for funds with or without a designated grant sub-recipient or fiscal agent.
 - The law does not provide opportunity for a Chief Elected Official to waive this responsibility.
- ▶ In most cases, liability for costs which are determined to be disallowed and require repayment, rest with the entity responsible for incurring the cost.
 - This should be clearly stated in contracts and other legal documents of the local workforce development board.

INTERLOCAL AGREEMENT

- ▶ If the local workforce development area is multi-jurisdictional, a written agreement is required which outlines how Chief Elected Officials will apportion liability in the event costs are determined as disallowed and require repayment to U.S. Department of Labor or Florida Department of Economic Opportunity.



CHIEF LOCAL ELECTED OFFICIAL MAY DESIGNATE GRANT SUB RECIPIENT OR FISCAL AGENT

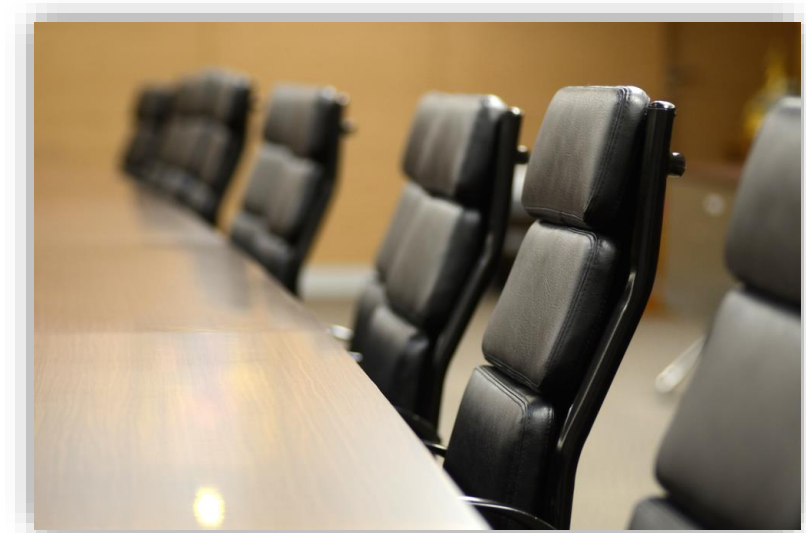
- ▶ The Chief Local Elected Official agrees the entity has reliable internal controls and ability to perform role.
- ▶ The Chief Local Elected Official ensures the designated entity has clearly defined roles and responsibilities.
- ▶ The designated grant sub-recipient/ fiscal agent disburses funds at direction of local workforce development board.
- ▶ Designation of a fiscal agent/ sub-recipient does not relieve the chief elected officials of liability for the misuse of grant funds.
- ▶ Should an entity not be designated, the Chief Local Elected Official's unit of government shall fulfill the role.

APPOINT MEMBERS TO THE LOCAL WORKFORCE DEVELOPMENT BOARD

- ▶ Chief Local Elected Official appoints the Local Workforce Development Board members.
- ▶ Workforce Innovation & Opportunity Act provides clear guidelines for who can serve on a local board.
- ▶ All required members must have voting privilege.

CATEGORIES OF LOCAL WORKFORCE DEVELOPMENT BOARD MEMBERSHIP

- ▶ Business
- ▶ Workforce
- ▶ Employment & Training
- ▶ Government



APPROVE KEY ACTIONS OF LWDB



- I. Approve local workforce development board budget
- II. Approve One-Stop Operator Selection
- III. Approve Memorandum of Understanding and Infrastructure Funding Agreement

I. LOCAL WORKFORCE DEVELOPMENT BOARD BUDGET

- ▶ All funds awarded to the local workforce development board must be budgeted.
 - Adult, dislocated worker, youth
- ▶ Develop a budget based on needs of the workforce system customers (business and individual) in the local area.
 - Budget must be consistent with local plan
 - Document which outlines what services will be provided and how.
 - Budget must include Infrastructure Funding Agreements for the local system.
 - Document which outlines how partners will share costs within the local system.

II. ONE-STOP OPERATOR SELECTION

- ▶ Must be competitively procured every four years
- ▶ The role of the One-Stop Operator must be clearly articulated in the procurement process as well as in the legal agreement between the local workforce development board and the selected operator.
- ▶ Local workforce development boards with the approval of the chief local elected official and Governor may be selected as the One-Stop Operator.
 - This does not waive the requirement for competitive procurement
 - Local boards must prepare written documentation outlining the competitive process to be used.

ROLE OF THE ONE-STOP OPERATOR

- ▶ Primary responsibility of One-Stop Operator is to coordinate the service delivery of required one-stop partners and service providers
- ▶ Optional roles:
 - Primary service provider in the center
 - Provide some of the services in the center
 - Coordinate service providers across the system

III. MEMORANDUM OF UNDERSTANDING

- ▶ The agreement which outlines the operation of the one-stop delivery system and identifies the role each partner will play.
 - Must be renewed, at a minimum, every three years
 - Must include Infrastructure Funding Agreement which outlines how each Partner will fund the services of the local workforce system.

CHIEF ELECTED OFFICIALS & LOCAL WORKFORCE DEVELOPMENT BOARD SHARED RESPONSIBILITIES

- ▶ Local Plan Development
- ▶ Conduct oversight of the local system
 - Set policy
 - Fiscal oversight
- ▶ Performance negotiations
- ▶ Regional planning, if applicable

FIREWALLS

Four roles designated or selected at the local level:



Any organization selected or appointed to perform more than one role must develop a written agreement with the chief local elected official and local workforce development board outlining how the organization will demonstrate internal controls and prevent conflicts of interest.

WHAT QUESTIONS DO YOU HAVE?





WRAP-UP & NEXT STEPS

UPCOMING TRAINING SESSIONS

- ▶ Oversight Roles & Responsibilities for Local Workforce Development Board Members
 - May 27, 9:00 am EDT
- ▶ Roles & Responsibilities for Local Workforce Development Board Staff
 - June 2, 9:00 am EDT



CONTACT INFORMATION



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One Stop and Program Support

Department of Economic Opportunity

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THANK YOU!



Maher & Maher, an IMPAQ Company, completed this project with federal funds, under contract number I630DC-17-U0009 ORM 2017, from the U.S. Department of Labor, Employment and Training Administration. The contents of this publication do not necessarily reflect the views or policies of the Department of Labor, nor does mention of trade names, commercial products, or organizations imply endorsement by the U.S. Government.

Maher & Maher is a specialized change management and talent-development consulting firm focused on advancing the collaboration between workforce, education and economic development.



RECORD OF ACTION/APPROVAL

**Consortium Meeting, Thursday, June 17, 2021
Board Meeting, Wednesday, June 9, 2021
Executive Committee, Wednesday, June 2, 2021**

TOPIC/ISSUE:

Budget for program year 7/1/21-6/30/22

BACKGROUND:

POINTS OF CONSIDERATION:

This budget is based on information we have at the moment. After we close out the current year in July, we will come back with an updated budget that has actual carryforward amounts.

*Previously approved budget by the Executive Committee has been revised due to a receiving a final budget from CareerSource Florida.

STAFF RECOMMENDATIONS:

Approve 2021 Budget

COMMITTEE ACTION:

Al Jones made a motion to approve the 2021-2022 Budget. Charles Harris seconded the motion. Motion carried.

BOARD ACTION:

Kevin Cunningham made a motion to approve the initial 2021-2022 Budget. Fred Morgan seconded the motion. Motion carried.

CONSORTIUM ACTION:

BUDGET - CSCLM												
PY 2021(JULY 2021 - JUNE 2022)												
6/9/2021 *	*	*	*	*	*	*	*	*	*	*	*	*
	ADULT	YOUTH	DISL. WORKER	LVER	CORRECTIONS	VOC REHAB	WAGNER PEYSER	VETERAN DVOP	WTP	SNAP	SIGNED BONUS	NAVIGATOR
ITA requirement: 35%												
REVENUE												
P.Y. 2020 CONTRACTS	1,278,426	1,222,997	636,354	12,547	196,310	45,494	156,104	30,646	1,759,613	267,432	100,000	260,870
CARRYFORWARD	290,000	471,439	-	-	-	-	50,000	-	-	-	-	-
INCENTIVES/SUPPLEMENTAL	-	196,704	97,421	-	-	-	-	-	-	-	-	-
TRANSFER	(81,000)	-	81,000	-	-	-	-	-	-	-	-	-
TOTAL REVENUE	1,487,426	1,891,140	814,775	12,547	196,310	45,494	206,104	30,646	1,759,613	267,432	100,000	260,870
EXPENDITURES												
TOTAL ITA	34.75%											
TRAINING:												
ITA %	35%		34%									
ITA/TRAINING	165,000	-	19,000	-	-	-	-	-	-	-	-	-
OJT	30,000	-	3,000	-	-	-	-	-	-	-	-	-
EMPLOYED WORKER	35,000	-	-	-	-	-	-	-	-	-	-	-
INTERNSHIPS	30,000	-	5,000	-	-	-	-	-	-	-	-	-
SUPPORTIVE SERVICES	2,000		2,000	-	-	-	-	-	-	-	-	-
TRAINING STAFF	195,500	-	195,500	-	-	-	-	-	-	-	-	-
TOTAL TRAINING	457,500	-	224,500	-	-	-	-	-	-	-	-	-
OPERATING:												
SUPPORTIVE SVS.	1,000	190,000	-	-	62,810	-	-	-	110,000	-	90,000	-
DIRECT CHARGE (STAFF)	-	-	-	-	61,969	14,046	-	-	453,312	82,924	-	-
ECKERD	30,000	570,000	15,000	-	-	-	-	-	-	-	-	-
DEO STAFF TRAVEL	-	-	-	1,400	-	-	9,600	3,000	-	-	-	-
OPERATING	-	5,350	-	-	-	-	32,800	5,000	-	-	3,336	44,650
TOTAL OPERATING	31,000	765,350	15,000	1,400	124,779	14,046	42,400	8,000	563,312	82,924	93,336	44,650
PROGRAM SUPPORT:												
FACILITIES	27,042	79,841	27,042	9,215	9,366	3,248	72,817	11,481	70,248	18,129	-	8,687
PROGRAM	65,550	139,094	32,138	188	-	1,885	5,690	1,073	75,589	11,127	448	5,991
INFORMATION TECHNOLOG	84,406	179,105	41,382	242	21,560	2,427	7,326	1,382	97,333	14,328	576	7,715
OUTREACH	60,745	128,897	29,782	174	-	1,747	5,272	995	70,047	10,311	415	5,552
BUSINESS	165,081	258,638	80,935	-	-	4,746	14,328	2,703	190,362	28,023	1,127	15,089
SELF SERVICES	102,984	161,348	50,490	-	-	2,961	8,939	-	118,755	17,482	703	9,413
CAREER SERVICES	269,857	-	132,304	-	-	7,759	23,423	-	311,184	45,809	1,843	24,666
TOTAL PROGRAM SUPPORT	775,664	946,923	394,074	9,819	30,927	24,773	137,794	17,635	933,519	145,208	5,112	77,112
TOTAL EXPENDITURES	1,264,164	1,712,273	633,574	11,219	155,706	38,818	180,194	25,635	1,496,831	228,132	98,448	121,762
ADMIN POOL	160,001	119,308	79,526	1,016	20,433	4,918	19,965	2,805	192,349	28,948	1,140	15,464
GENERAL POOL	43,198	32,212	21,471	274	5,517	1,328	5,390	757	51,932	7,816	308	4,175
TOTAL INDIRECT COST RATE	203,199	151,520	100,997	1,291	25,949	6,245	25,356	3,562	244,281	36,764	1,448	19,639
BALANCE	20,063	27,347	80,204	37	14,655	430	554	1,449	18,500	2,536	104	119,469
INDIRECT RATE CALCULATION												
DIRECT TOTAL COSTS	1,264,164	1,712,273	633,574	11,219	155,706	38,818	180,194	25,635	1,496,831	228,132	8,448	121,762
LESS: LEASES	(48,466)	(68,130)	(29,239)	(3,689)	(4,286)	(2,375)	(32,241)	(4,851)	(71,411)	(13,607)	-	(7,167)
	-	-	-	-	-	-	-	-	-	-	-	-
SUBAWARD (ECKERDS)	(30,000)	(760,000)	(15,000)	-	-	-	-	-	-	-	-	-
TOTAL MTDC	1,185,698	884,143	589,335	7,531	151,419	36,443	147,954	20,785	1,425,420	214,525	8,448	114,595

BUDGET - CSCLM					
PY 2021(JULY 2021 - JUNE 2021)					
6/9/2021	*	*	*	*	
	YOUTH BUILD 3	RWB 6	REA	UN-RESTR	TOTAL
ITA requirement: 35%					
REVENUE					
P.Y. 2020 CONTRACTS	-	5,665	26,763	-	5,999,221
CARRYFORWARD	624,887		-	147,354	1,583,680
INCENTIVES/SUPPLEMENTAL TRANSFER	-	-	-	-	294,125
TOTAL REVENUE	624,887	5,665	26,763	147,354	7,877,026
EXPENDITURES					
TOTAL ITA					
TRAINING:					
ITA %					
ITA/TRAINING	27,600	-	-	-	211,600
OJT	-	-	-	-	33,000
EMPLOYED WORKER	-	-	-	-	35,000
INTERNSHIPS	-	-	-	-	35,000
SUPPORTIVE SERVICES	-	-	-	-	4,000
TRAINING STAFF	-	-	-	-	391,000
TOTAL TRAINING	27,600	-	-	-	709,600
OPERATING:					
SUPPORTIVE SVS.	138,720	-	-	-	592,530
DIRECT CHARGE (STAFF)	-	-	-	-	612,250
ECKERD	104,900	-	-	-	719,900
DEO STAFF TRAVEL	-	-	-	-	14,000
OPERATING	-	-	-	30,000	121,136
TOTAL OPERATING	243,620	-	-	30,000	2,059,816
PROGRAM SUPPORT:					
FACILITIES	8,762	5,665	8,158	-	359,701
PROGRAM	-	-	1,095	-	339,868
INFORMATION TECHNOLOGY	-	-	1,410	-	459,192
OUTREACH	-	-	1,014	-	314,951
BUSINESS	-	-	2,757	-	763,790
SELF SERVICES	-	-	1,720	-	474,795
CAREER SERVICES	-	-	4,507	-	821,351
TOTAL PROGRAM SUPPORT	8,762	5,665	20,660	-	3,533,648
TOTAL EXPENDITURES	279,982	5,665	20,660	30,000	6,303,064
ADMIN POOL	4,138	-	2,270	4,048	656,329
GENERAL POOL	1,117	-	613	1,093	177,200
TOTAL INDIRECT COST RATE	5,255	-	2,882	5,141	833,530
BALANCE	339,650	(0)	3,221	112,213	740,432
INDIRECT RATE CALCULATION					
DIRECT TOTAL COSTS	279,982	-	20,660	30,000	6,207,399
LESS: LEASES	(5,698)	-	(3,840)	-	(295,000)
	-	-	-	-	-
SUBAWARD (ECKERDS)	(243,620)	-	-	-	(1,048,620)
TOTAL MTDC	30,664	-	16,820	30,000	4,863,779



RECORD OF ACTION/APPROVAL

Consortium Meeting Thursday, June 17, 2021

TOPIC/ISSUE:

Board member appointments

BACKGROUND:

Recent legislation limits non-governmental board member terms to a maximum of 8 years, effective July 1, 2021, forward. Current members that have terms expiring and other members can be reappointed for up to five-year terms. Current terms are staggered to allow for board member continuity of knowledge.

POINTS OF CONSIDERATION:

Per a previous discussion at the May meeting, consideration of reappointing all members for five years from their current expiration date will provide time for more discussion with the Legislature about achieving their goal of term limits with an approach that considers some of the nuances of membership.

STAFF RECOMMENDATIONS:

Reappoint all board members to a term that extends five years from their current term expirations as shown on the attached matrix.

CONSORTIUM ACTION:

BOARD MEMBERSHIP TERMS - 5/19/2021							
	WORKFORCE REP(20%)=8 MEMBERS (AT 33 TOTAL)						
	SECTOR	NAME	APPOINTED	LENGTH	TERM EXPIRES	Proposed Term	COUNTY
1	Apprenticeship	Fred Morgan	2/28/2020	5	2025	2029	Marion
2	CBO/ Barriers	Theresa Flick	6/30/2020	4	2024	2029	Citrus
3	CBO/ Barriers	Charles Harris	1/25/2018	3	2021	2026	Marion
4	CBO/Barriers-Vet	Ted Knight	6/30/2020	3	2023	2028	Citrus
5	Labor	Fred Morgan	6/30/2020	5	2025	2029	Marion
6	Labor	Nelson Mathis, Jr	6/30/2020	4	2024	2029	Levy
7	Youth Serving Organization	Jorge Martinez	6/30/2019	3	2022	2027	Marion
8	Youth Serving Organization	Vacant		4	2023	2028	Levy
	GOVERNMENT/ EDC 4 SEATS						
9	Economic Development	Vacant		1	2021	2026	Levy
10	Economic Development	David Pieklik	3/10/2021	1	2021	2026	Citrus
11	Trans/ Public Housing	Judy Houlios	6/30/2019	3	2022	2027	Marion
12	Voc Rehab	Angie White	2/28/2020	4	2024	2029	All
	EDUCATION 4 SEATS						
13	Education-Adult	Mark Vianello	6/30/2019	3	2022	2027	Marion
14	Education-Higher Private	Pete Beasley	6/30/2020	4	2024	2029	Marion
15	Education-Higher Public	Mark Paugh	6/28/2016	5	2021	2026	All
16	Education-School District	Debra Stanley	6/30/2019	4	2023	2028	Citrus
	PRIVATE SECTOR 17 SEATS						
17	Private Sector	Al Jones	6/30/2019	4	2023	2028	Citrus
18	Private Sector	Kevin Cunningham	6/28/2016	5	2021	2026	Citrus
19	Private Sector	Mike Melfi	6/28/2016	4	2023	2028	Citrus
20	Private Sector	John Murphy	3/10/2021	3	2023	2028	Citrus
21	Private Sector	Rachel Riley	6/30/2020	4	2024	2029	Citrus
22	Private Sector	Carl Flanagan	5/17/2021	4	2021	2026	Citrus
23	Private Sector	Arno Proctor	2/28/2020	4	2024	2029	Levy
24	Private Sector	Kim Baxley	1/25/2018	4	2022	2027	Levy
25	Private Sector	John Hemken	6/12/2020	3	2023	2028	Levy
26	Private Sector	Lewrissa Mainwairing	5/17/2021	2	2022	2026	Levy
27	Private Sector	*Vacant		2	2024	2026	Levy
28	Private Sector	Brandon Whiteman	2/25/2019	3	2022	2027	Marion
29	Private Sector	Darlene Goddard	6/28/2016	5	2021	2026	Marion
30	Private Sector	Jeff Chang	2/25/2019	4	2023	2028	Marion
31	Private Sector	Kathy Judkins	6/28/2016	5	2021	2026	Marion
32	Private Sector	Pat Reddish	6/30/2019	3	2022	2027	Marion
33	Private Sector	Equilla Richardson	3/10/2021	4	2023	2028	Marion

BOARD MEETING AGENDA

Revised 6/8/2021

Wednesday, June 9, 2021 – 11:30 a.m.

Zoom Link: <https://us02web.zoom.us/j/82722685126>

Conference Line: 1 646 558 8656 Meeting ID: 827 2268 5126

Call to Order		K. Baxley
Invocation and Pledge of Allegiance		R. Stermer
Roll Call		C. Schnettler
Public Comment		
Approval of Minutes, April 8, 2021	Pages 3 - 7	K. Baxley
Introduction of New Members		K. Baxley

DISCUSSION ITEMS

Financial Disclosure Forms / Annual Conflicts Reminder	R. Skinner
Net Promoter Board Survey	R. Skinner
Board Orientation	R. Skinner

APPROVAL OF CONTRACTS 2021-2022

Master Contracts Requiring 2/3rds Vote/Under \$25,000

1. Citrus County Chamber of Commerce

Pages 8 – 9

R. Skinner

Master Contracts Requiring 2/3rds Vote/Under \$25,000 -
OJT, CBT, or Internship/Paid Work Experience Training
Opportunities

2. Ancorp
3. Key Training Center
4. Lockheed Martin
5. A & M Manufacturing
6. Ocala Housing Authority

Master Contracts 2/3rds Vote/Exceeds \$25,000

7. College of Central Florida
8. Marion County School Board
9. Ocala Metro Chamber and Economic Partnership

Contracts Not Requiring 2/3rds Vote

10. Youth Services Contracting – Eckerd Connects
11. Thomas P. Miller and Associates
12. Underwood and Sloan
13. Powell and Jones – Joint Auditing

14. Powell and Jones – Subrecipient Monitoring
15. Nature Coast Business Development Council
16. School Board of Levy County

LUNCH AND VIDEO PRESENTATION

ACTION ITEMS

Schedule of Operations	Pages 10 - 12	D. French
Payroll Services Procurement	Pages 13 - 25	D. French
FWDA Dues	Page 26	R. Skinner
2021/2022 Budget	Pages 27 - 29	R. Skinner

CONSENT AGENDA

<u>CEO Contract Review – 5/21/2021</u>	Pages 30 - 35	K. Baxley
CEO Contract Renewal		

<u>Performance and Monitoring – 5/11/2021</u>	Pages 36 - 40	T. Knight
DEO Programmatic Monitoring and Close Out – PY 19-20		
TPMA Annual Review		

<u>Business and Economic Development – 5/13/2021</u>		P. Beasley
No Action Items		

<u>Career Center – 5/20/2021</u>	Pages 41 - 43	C. Harris
Eckerd Budget Modification		
Talent Management Selection RFP		
Recovery Navigator		

<u>Marketing and Outreach – 5/26/2021</u>		A. Jones
No Action Items		

<u>Executive Committee – 4/29/2021, 5/24/2021, 6/2/2021</u>	Pages 44 - 52	K. Baxley / R. Skinner
Sub-Grantee Agreement		
Citrus Sign-On Bonus		
Healthcare/Employee Benefits		
FWDA Membership		
Florida Department of Corrections Grant		
Region 6 Agreement		
Telework Flex Days		

PROJECT UPDATES

None

MATTERS FROM THE FLOOR

ADJOURNMENT