



BOARD MEETING AGENDA

Wednesday, March 9, 2022 – 11:30 a.m.

College of Central Florida – Lecanto Campus

College of Central Florida – Lecanto Campus – Conference Center

3800 S Lecanto Hwy, Lecanto, FL 34461

REVISED 3/8/2022

Zoom Link: <https://us02web.zoom.us/j/87269711560>
Conference Line: 1 646 558 8656 Meeting ID: 872 6971 1560

Call to Order		B. Whiteman
Invocation and Pledge of Allegiance		R. Stermer
Roll Call		C. Schnettler
Public Comment		B. Whiteman
Approval of Minutes, December 8, 2021	Pages 3 - 15	B. Whiteman
 <u>LUNCH / PRESENTATIONS</u>		
DEO Annual Performance Review	Pages 16 – 32	C. Williams / D. Harper
Audit Report	Pages 33 - 71	R. Powell
Strategic Plan Presentation	Pages 72 - 91	N. Pramekumar / P. Gillen
 <u>DISCUSSION ITEMS</u>		
State Update	Pages 92 - 98	R. Skinner
Workforce Issues that are Important to our Community		R. Skinner
 <u>ACTION ITEMS</u>		
None		D. French
 <u>CONSENT AGENDA</u>		
<u>Performance and Monitoring – 2/8/2022</u>		T. Knight
No Action Items		
 <u>Business and Economic Development – 2/10/2022</u>		 P. Beasley
No Action Items		
 <u>Career Center – 2/17/2022</u>		 C. Harris
Welfare Transition Career Coach		
Re-entry Navigator		
Staffing Firm		

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.



Marketing and Outreach – 2/23/2022
No Action Items

A. Jones

Executive Committee – 3/2/2022
Welfare Transition Career Coach
Re-entry Navigator
Staffing Firm
Background Investigations
ICDS Renewal
National Training Renewal
Agile Workforce Staffing Plan

Pages 100 - 105 B. Whiteman /
R. Skinner

PROJECT UPDATES

None

MATTERS FROM THE FLOOR

ADJOURNMENT

2021 – 2022 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	
5/10/2022	5/12/2022	5/19/2022	5/25/2022	6/1/2022	6/7/2022	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
BOARD MEETING**

MINUTES

DATE: December 8, 2021
PLACE: College of Central Florida, Webber Center
TIME: 11:30 a.m.

MEMBERS PRESENT

Albert Jones
Brandon Whiteman
Carl Flanagan
Charles Harris
Christie McElroy
Darlene Goddard
Debra Stanley
Fred Morgan
Jeff Chang
John Murphy
Jorge Martinez
Judy Houlios
Kathy Judkins
Kimberly Baxley
Mark Paugh
Pat Reddish
Pete Beasley
Ted Knight
Theresa Flick
Tiffany Wiggins

MEMBERS ABSENT

Angie White
Arno Proctor
David Pieklik
Equilla Wheeler
John Hemken
Kevin Cunningham
Lanny Mathis
Lewrissa Johns
Mark Vianello

OTHER ATTENDEES

Rusty Skinner, CSCLM
Dale French, CSCLM
Larry Trowbridge, CSCLM
Laura Byrnes, CSCLM
Iris Pozo, CSCLM

Cira Schnettler, CSCLM
Robert Stermer, Attorney
Roseann Fricks, Early Learning Coalition
Wendy Williams, Early Learning Coalition

CALL TO ORDER

The meeting was called to order by Kim Baxley, Chair, at 11:30 a.m.

ROLL CALL

Cira Schnettler called roll and a quorum was declared present.

APPROVAL OF MINUTES

Al Jones made a motion to approve the minutes from the September 8, 2021, meeting. Deb Stanley seconded the motion. Motion carried.

PRESENTATIONS

Early Learning Impact on Labor Force – Presentation Title: 170

Roseann Fricks, the Chief Executive Officer for the Early Learning Coalition provided details on the effects of lack of childcare on the workforce system.

Ethics Training

Board Attorney Robert Stermer provided annual ethics training for the board.

LUNCH

DISCUSSION ITEMS

State Update

Rusty Skinner updated the board on Bill 1507, noting that as part of the requirements in the Bill workforce regions will be receiving letter grades from the State. There are also conflicting statues hindering tuition payments to students due to a 10% holdback from the State to training providers. We will continue to work with the State on both issues.

Workforce Issues that are Important to our Community

The board members did not present items for discussion.

Other Items

Rusty Skinner notified the Board that there was a lack of interest from candidates and employers for the Citrus County Sign-on Bonus program. Two options on how to handle the unused funds will be presented before the Citrus BOCC; return the funds to the BOCC or pass the funds to the YMCA, which is already receiving funds from the program for childcare assistance.

Rusty Skinner invited board members to attend the NAWB conference in April. The invite with details will be emailed.

Strategic Plan Process

Dale French explained that community partners were invited to provide input at sessions held in all three counties in October. TPMA, the One Stop Operator, facilitated the sessions and received feedback that they are compiling into a report. Several integral community partners were not able to make the sessions. TPMA is coming back to visit with those partners next week. A board retreat will be planned to solicit input and recommendations from all board members and then the plan will be brought back to the board for final approval.

Podcast Brainstorming

Laura Byrnes invited members to suggest topics of interest on workforce challenges that would be beneficial to the business community as podcast discussions. She presented several ideas such as soft skills needs and diversity and inclusion policies and practices. Roseann Fricks presentation would also be an interesting podcast as well as inviting the CEP to discuss the Labor Force Participation Survey. She noted that beyond a small servicing fee to host the podcast, the podcasts are done internally and bear no additional costs.

ACTION ITEMS

None

CONSENT AGENDA

Performance and Monitoring – 11/9/2021

No Action Items

Ted Knight provided a summary of the committee activities.

Business and Economic Development – 11/18/2021

Labor Force Participation Survey

Committee Chair Pete Beasley provided a summary of the committee activities.

Career Center – 11/18/2021

No Action Items

Committee Chair Charles Harris provided a summary of the committee activities.

Marketing and Outreach – 11/17/2021

No Action Items

Committee Chair Al Jones provided a summary of the committee activities.

Executive Committee – 9/1/2021, 10/6/2021, 12/1/2021

Policy OPS-84 – Emergency Paid Sick Leave

Eckerd Budget Modification

TPMA Strategic Planning Contract Modification

Performance Dashboard

Virtual Platform Selection

Sub-recipient Monitoring

Eckerd Monitoring Report

Monitoring Close-Out

Budget Update

Kim Baxley and Rusty Skinner provided a summary of the committee activities.

Al Jones made a motion to approve all consent agenda items. Deb Stanley seconded the motion. Motion carried.

PROJECT UPDATES

None

MATTERS FROM THE FLOOR

ADJOURNMENT

There being no further business, the meeting was adjourned at 1:08 p.m.

APPROVED:



RECORD OF ACTION/APPROVAL

**Board Meeting - Wednesday, December 8, 2021
Business and Economic Development – Thursday, November 18, 2021**

TOPIC/ISSUE:

Labor Force Participation Study

BACKGROUND:

The pandemic has created a challenge in responding to the needs of employers seeking to fill positions. Record numbers of workers have either been displaced from work or have been forced to leave their jobs. We have partnered with the CEP on a number of workforce issues/projects over the years. The CEP has been looking into labor force participation as a way to better analyze and respond to the labor shortage we currently face.

POINTS OF CONSIDERATION:

The attached proposal from Younger and the CEP will provide additional information about issues affecting worker that are not participating in our workforce.

STAFF RECOMMENDATIONS:

Staff recommends sharing the cost of the Study with the CEP for a total of \$19,750.

COMMITTEE ACTION:

David Pieklik approved providing financial support for the study. Mike Kelly seconded the motion. Motion carried.

BOARD ACTION:

This action item was part of the Consent Agenda. Al Jones made a motion to approve all consent agenda items. Deb Stanley seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday - December 8, 2021
Executive Committee Meeting - Wednesday, September 1, 2021

TOPIC/ISSUE:

Emergency Paid Sick Leave

BACKGROUND:

The Family First Coronavirus Response Act (FFCRA) and the American Rescue Plan Act of 2021 had authorized certain employers to provide paid sick leave to individuals affected by Covid-19. This benefit could be applied to any employee that could not work due to being a caregiver for a sick family member, personal illness and side effects from receiving an approved vaccine.

CSCLM has opted to offer emergency paid sick leave to staff under this policy modeled closely after the FFCRA sick leave allowance.

POINTS OF CONSIDERATION:

CSCLM wishes to offer emergency paid sick leave as a benefit to employees that have been fully vaccinated or have an exception covered by documented medical, disability, or religious reasons. The intent is to incentivize individuals to get vaccinated. We feel individuals that have done their part to protect themselves and the interests of the organization should be afforded additional protection should they become ill from a 'breakthrough' Covid infection. This benefit would only pertain to the employee and not be offered for other related instances involving household or family members.

STAFF RECOMMENDATIONS:

Approve the attached *OPS-84 Supplemental* Guidance that will act as an attachment to our existing *OPS-84 Covid-19 Pandemic Policy*.

COMMITTEE ACTION:

Al Jones made a motion to approve the Emergency Paid Sick Leave Supplemental Guidance. Pete Beasley seconded the motion. Motion carried.

BOARD ACTION:

This action item was part of the Consent Agenda. Al Jones made a motion to approve all consent agenda items. Deb Stanley seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

**Board Meeting, Wednesday - December 8, 2021
Executive Committee Meeting - Wednesday, October 6, 2021**

TOPIC/ISSUE:

Eckerd Contract Funding Increase

BACKGROUND:

We received additional funding for soft skills and workplace fundamental training. We feel this funding would be best used in the Youth program. This additional funding will help offset budget cuts incurred in this program year.

POINTS OF CONSIDERATION:

Funding in the amount of \$15,425.00 will be obligated to the Eckerd Connects annual youth service provider contract.

STAFF RECOMMENDATIONS:

Approve a budget modification in the amount of \$15,425.00

COMMITTEE ACTION:

Al Jones made a motion to approve the budget modification to Eckerd contract to include the additional funding of \$15,425.00. Charles Harris seconded the motion. Motion carried.

BOARD ACTION:

This action item was part of the Consent Agenda. Al Jones made a motion to approve all consent agenda items. Deb Stanley seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday - December 8, 2021
Executive Committee Meeting - Wednesday, October 6, 2021

TOPIC/ISSUE:

Strategic Planning

BACKGROUND:

Our last strategic planning took place in 2015. We feel that as we emerge from Covid and reviewing newly passed legislation that it is wise to begin the process again. Thomas P. Miller and Associates conducted our strategic planning session in 2015. Since they are our current One Stop Operator, we feel that it is within their scope to conduct the planning again. We also feel that their close engagement with us allows them to better analyze us as an organization. There will be additional time, personnel, and travel costs to conduct the planning in addition to their current contract. This cost is anticipated to be \$12,500.00.

POINTS OF CONSIDERATION:

This planning will include stakeholder surveys, ongoing and direct communication with area stakeholders and several in person meetings to discuss survey results and S.W.O.T.s. Planning meetings are anticipated to be:

October 19-22 – Stakeholder meeting in each county
December 6-11 – Stakeholder meeting in each county
December 8 – Strategic Planning session – CLM Board of Directors
March 9 – Rollout of final plan

STAFF RECOMMENDATIONS:

Approve a budget modification in the amount of \$12,500.00 for strategic planning services.

COMMITTEE ACTION:

Charles Harris made a motion to approve the additional cost for strategic planning services provided by TPMA. Al Jones seconded the motion. Motion carried.

BOARD ACTION:

This action item was part of the Consent Agenda. Al Jones made a motion to approve all consent agenda items. Deb Stanley seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday - December 8, 2021
Executive Committee Meeting - Wednesday, October 6, 2021

TOPIC/ISSUE:

eIMPACT website performance and LMI dashboard

BACKGROUND:

eIMPACT provides performance and labor market information dashboards that integrate into our existing website. Workforce boards and economic development entities across the country are using this service to provide at-a-glance data to their boards, community partners and other stakeholders. Currently Region 9 (Alachua, Bradford) is using this service.

It provides full transparency of current state/federal performance goals and current standings as well as numerous labor market statistics for local stakeholders and businesses/labor force that may be looking at expanding or relocating to the area.

POINTS OF CONSIDERATION:

Several options for the depth of information are available. Annual subscription costs between \$6000 and \$9000 annually depending on selected modules.

STAFF RECOMMENDATIONS:

Approve engaging in an annual agreement with eIMPACT up to \$9000.

COMMITTEE ACTION:

Al Jones made a motion to approve the annual agreement up to \$9000.00. Brandon Whiteman seconded the motion. Motion carried

BOARD ACTION:

This action item was part of the Consent Agenda. Al Jones made a motion to approve all consent agenda items. Deb Stanley seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday - December 8, 2021
Executive Committee Meeting - Wednesday, October 6, 2021

TOPIC/ISSUE:

Virtual Event Platform Selection

BACKGROUND:

On September 8, 2021 the Board approved the release of a request for proposals (RFP) to procure a Virtual Event Platform to assist our Business Services team with successful virtual job fairs, hiring events, youth career expos and other virtual events. The RFP closed on September 17, 2021. Five acceptable proposals were received.

Staff met on September 27, 2021 to review and score each proposal. It was decided three companies who submitted proposals would be asked to present a demo for the review panel, with the other two companies being too cost prohibitive. Eight staff members were involved in the review process totaling a possible 100 points for each proposal. The initial review and scoring resulted in the following:

Virtual Event Platform RFP	Scoring Matrix Results–Max Points = 100
Company	Aggregate Score
Premier Virtual*	88.2
Empyra*	77.1
Brazen*	68.9
vFairs	73.1
Social27	70.1

*requested to provide a full product demonstration

POINTS OF CONSIDERATION:

Based on the overall scoring matrix and overall cost Premier Virtual is the platform which best meets the required elements in the RFP. Additionally, considering an immediate go live date Premier Virtual provided a concise explanation of training and support which will be provided with the platform.

STAFF RECOMMENDATIONS:

Staff recommends the selection and execution of a service contract with Premier Virtual.

COMMITTEE ACTION:

Al Jones made a motion to approve the service the Premier Virtual contract. Fred Morgan seconded the motion. Motion carried.

BOARD ACTION:

This action item was part of the Consent Agenda. Al Jones made a motion to approve all consent agenda items. Deb Stanley seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday - December 8, 2021
Executive Committee Meeting - Wednesday, December 1, 2021

TOPIC/ISSUE:

Release of the Request for Proposals (RFP) for sub-recipient monitoring.

BACKGROUND:

Pursuant to the Workforce Innovation and Opportunity Act all local workforce development boards are required to procure a firm to conduct monitoring of sub-recipient's of CareerSource CLM funding.

POINTS OF CONSIDERATION:

Powell & Jones was the company procured for this monitoring in 2017 and was negotiated for renewal annually for the allowed period of up to five program years. This contract will expire on June 30, 2022. The new procurement for this service will result in a contractual agreement with a firm that is qualified to conduct the annual required monitoring for a period of UP TO five program years. The contract will be negotiated annually.

STAFF RECOMMENDATIONS:

Requesting approval for authority to release the Sub-Recipient Financial Monitoring RFP on March 1, 2022 after the appropriate Public Notice period.

COMMITTEE ACTION:

Al Jones made a motion to approve the release of the RFP for sub-recipient financial monitoring. Charles Harris seconded the motion. Motion carried.

BOARD ACTION:

This action item was part of the Consent Agenda. Al Jones made a motion to approve all consent agenda items. Deb Stanley seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday - December 8, 2021
Executive Committee Meeting - Wednesday, December 1, 2021

TOPIC/ISSUE:

Sub-recipient Monitoring – Eckerd Connects

BACKGROUND:

We are required to conduct monitoring of our sub-recipient youth provider annually. Our current provider is Eckerd Connects

POINTS OF CONSIDERATION:

The following report details the areas that were monitored and any issues found. The only issue reported was a difference in total contract payment activity. Eckerd reported \$16,972 less in contractual services than we posted as paid. This was determined to be due to differences in the organizations accrual policies. There were no finding or questioned costs.

STAFF RECOMMENDATIONS:

Accept the attached monitoring report from Powell and Jones for sub-recipient monitoring.

COMMITTEE ACTION:

Charles Harris made a motion to accept the monitoring report for Eckerd Connects. Ted Knight seconded the motion. Motion carried.

BOARD ACTION:

This action item was part of the Consent Agenda. Al Jones made a motion to approve all consent agenda items. Deb Stanley seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

**Board Meeting, Wednesday - December 8, 2021
Executive Committee Meeting - Wednesday, December 1, 2021**

TOPIC/ISSUE:

Acceptance of 2020-2021 monitoring close-out

BACKGROUND:

State programmatic and finance monitoring occurred May 3 through May 7, 2021. We have submitted our responses to the monitoring for DEO's review and approval.

POINTS OF CONSIDERATION:

We received a close-out letter dated September 21, 2021 accepting our responses and officially closing the last programmatic monitoring review.

STAFF RECOMMENDATIONS:

Accept the final report and close-out letter.

COMMITTEE ACTION:

Fred Morgan made a motion to accept the final report and close-out letter. Ted Knight seconded the motion. Motion carried.

BOARD ACTION:

This action item was part of the Consent Agenda. Al Jones made a motion to approve all consent agenda items. Deb Stanley seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday - December 8, 2021
Executive Committee Meeting - Wednesday, December 1, 2021

TOPIC/ISSUE:

Updated budget for program year 7/1/21-6/30/22

BACKGROUND:

POINTS OF CONSIDERATION:

The budget is updated for the below:

- Additional WIOA Incentives of \$13,249
- One Stop Security grant of \$84,148.80

STAFF RECOMMENDATIONS:

Approve updated 2021 Budget

COMMITTEE ACTION:

Ted Knight made a motion to approve the amended budget. Fred Morgan seconded the motion. Motion carried.

BOARD ACTION:

This action item was part of the Consent Agenda. Al Jones made a motion to approve all consent agenda items. Deb Stanley seconded the motion. Motion carried.

CareerSource Citrus Levy Marion

Florida Department of Economic Opportunity Annual Performance Presentation

Charles Williams, DEO Workforce Programs Administrator

Daniel Harper, DEO Senior Management Analyst Supervisor

March 9, 2022



Workforce System Funding

- United States Department of Labor Employment and Training Administration (USDOL - ETA)
- United States Department of Health and Human Services (HHS)
- United States Department of Agriculture (USDA)
- State of Florida General Revenue (GR)
- Other Sources

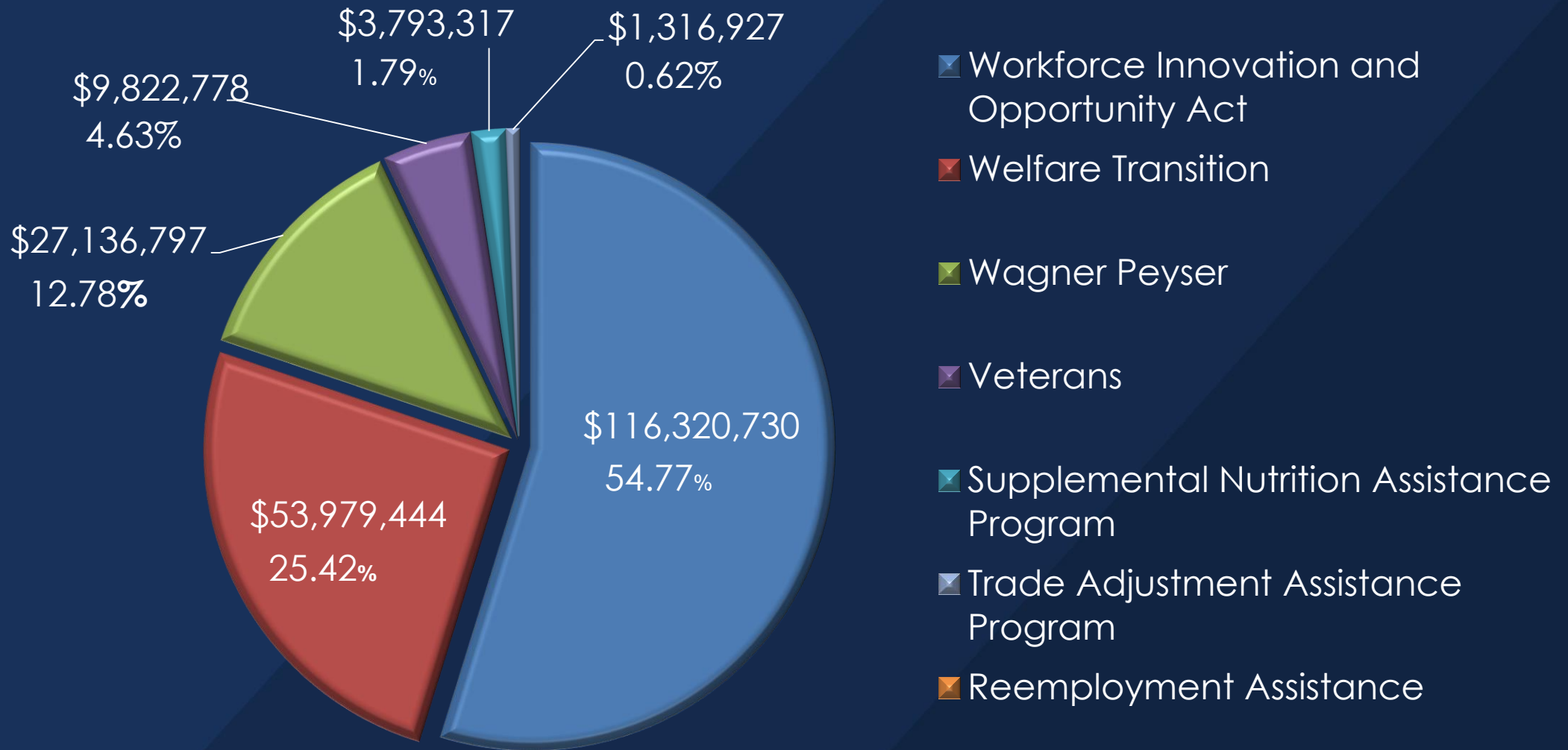
Workforce System Oversight

- United States Department of Labor Employment and Training Administration (USDOL - ETA)
- Florida Legislature
- Reimagining Education and Career Help (REACH) Office
- Department of Economic Opportunity (DEO)
- CareerSource Florida (CSF)
- Chief Local Elected Officials or Consortiums (CLEO)
- Local Workforce Development Boards (LWDB)

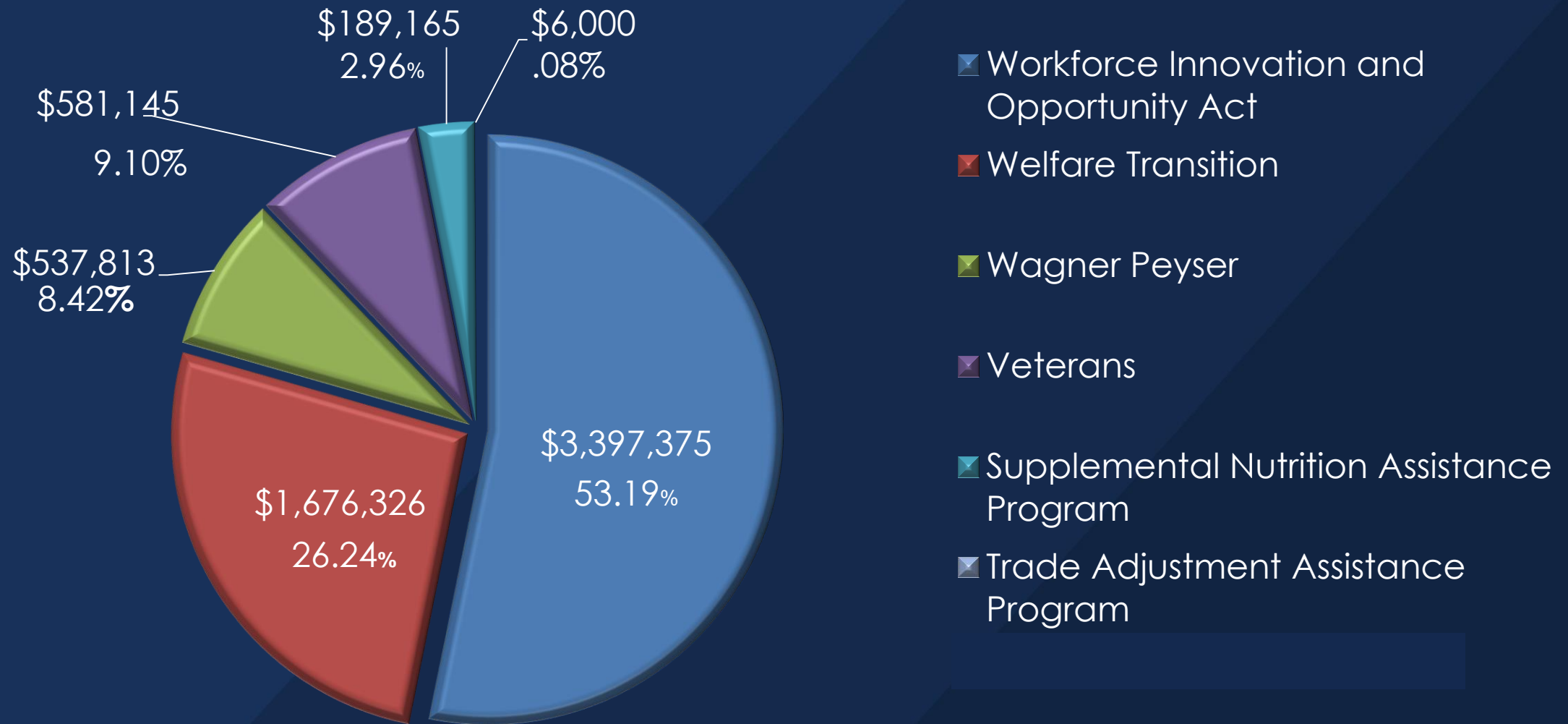
Local Service Delivery

- One-Stop Career Centers
 - Core Partners and Required Partners
 - Other Local Partnerships
- Job Seekers
- Employers

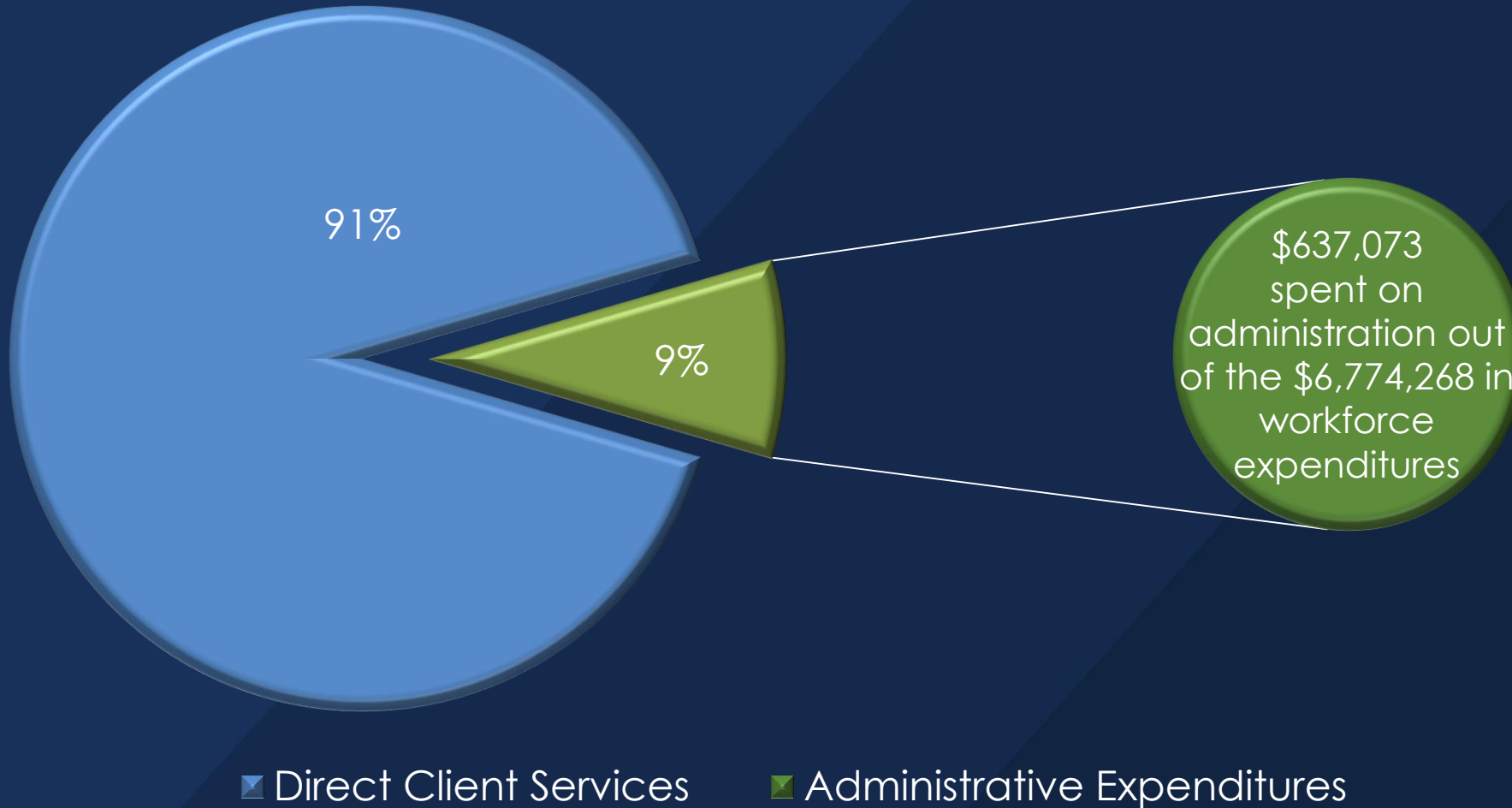
Statewide Funding \$212,369,993



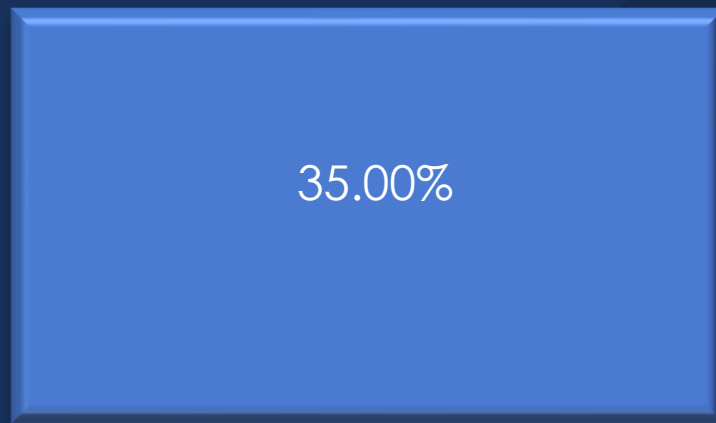
Local Board Funding \$6,387,824



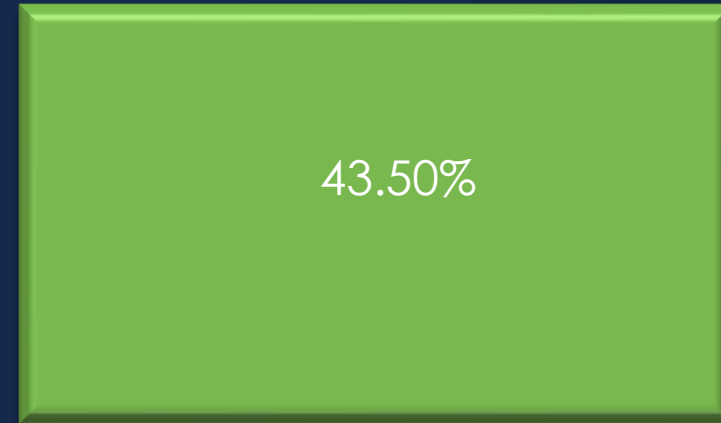
Direct Client Services and Administrative Expenditures



Individual Training Account (ITA) Expenditures



Annual ITA Expenditure Requirement



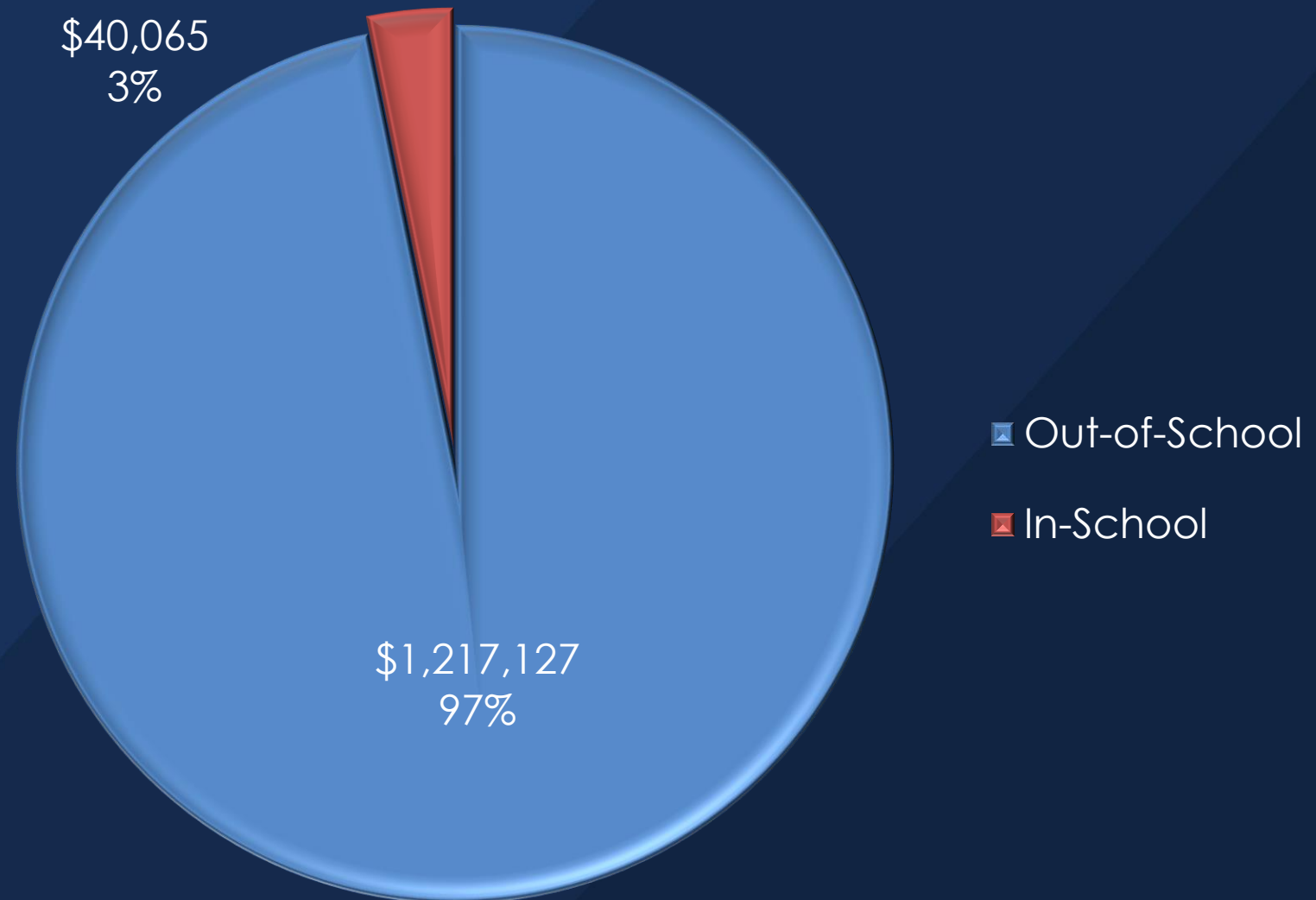
ITA Expenditures

Work Experience Expenditures

WIOA Requirement: Greater than 20% Work Experience Expenditures



Out-of-School Youth Expenditures



Primary Indicators of Performance

Customer Groups

- Adult Metrics (5)
- Dislocated Worker Metrics (5)
- Youth Metrics (5)
- Wagner Peyser Metrics (3)

Metrics

- Employed in 2nd quarter after exiting the program
- Employed in 4th quarter after exiting the program
- Median wages in 2nd quarter after exiting the program
- Credential attainment rate
- Measurable Skill Gains (Not applicable for Wagner Peyser)

Primary Indicators of Performance Results

LWDB 10 Program Year (PY) 2020 Performance for July 1, 2020 – June 30, 2021	PY2020-2021 1st Quarter Performance	PY2020-2021 2nd Quarter Performance	PY2020-2021 3rd Quarter Performance	PY2020-2021 4th Quarter Performance	PY2020-2021 Performance Goals
Adult Programs:					
Employed 2nd Quarter After Exit	88.9%	87.9%	89.2%	88.6%	85.2%
Median Wage 2nd Quarter After Exit	\$7,217.00	\$7,687.00	\$7,079.00	\$6,419.00	\$7,000.00
Employed 4th Quarter After Exit	90.9%	87.6%	84.3%	81.1%	83.0%
Credential Attainment Rate	85.4%	88.0%	86.4%	86.9%	88.0%
Measurable Skill Gains	72.8%	83.5%	85.4%	89.3%	50.0%
Dislocated Workers Programs:					
Employed 2nd Quarter After Exit	85.7%	80.0%	66.7%	60.0%	83.2%
Median Wage 2nd Quarter After Exit	\$8,789.00	\$7,339.00	\$7,339.00	\$7,432.00	\$7,000.00
Employed 4th Quarter After Exit	100.0%	100.0%	85.7%	80.0%	79.0%
Credential Attainment Rate	75.0%	50.0%	100.0%	100.0%	75.2%
Measurable Skill Gains	0.0%	100.0%	100.0%	100.0%	75.0%
Youth Programs:					
Employed 2nd Quarter After Exit	85.1%	85.4%	85.0%	83.3%	75.5%
Median Wage 2nd Quarter After Exit	\$3,447.00	\$3,266.00	\$3,174.00	\$3,076.00	\$3,200.00
Employed 4th Quarter After Exit	79.5%	75.4%	79.8%	73.8%	73.0%
Credential Attainment Rate	99.2%	100.0%	100.0%	98.5%	85.3%
Measurable Skill Gains	88.6%	93.0%	94.2%	97.9%	88.0%
Wagner Peyser Programs:					
Employed 2nd Quarter After Exit	69.3%	70.8%	67.5%	65.5%	65.0%
Median Wage 2nd Quarter After Exit	\$5,213.00	\$5,006.00	\$4,994.00	\$4,971.00	\$5,000.00
Employed 4th Quarter After Exit	67.1%	71.0%	68.9%	66.0%	64.2%

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

Technical Assistance - Primary Indicators of Performance

Metrics Failed:

- Dislocated Worker Employed in 2nd quarter after exiting the program

Programmatic Monitoring Activities

LWDB 10 Program Year (PY) 2020 July 1, 2020 – June 30, 2021	PY 2019 Findings	PY 2020 Findings
Welfare Transition	1	1
Wagner-Peyser / MIS / MSFW	2	3
Supplemental Nutrition Assistance Program - Employment and Training	1	0
WIOA Adult / Dislocated Worker / Youth	1	0
Trade Adjustment Assistance Act	0	0
Total Findings	5	4

Financial Monitoring Activities

LWDB 10 Program Year (PY) 2020 July 1, 2020 – June 30, 2021	PY 2019	PY 2020
Findings	0	0
Issues of Non-Compliance	0	0
Observations	2	0
Technical Assistance	0	0

Q&A



Contact



Thank You

Please contact our office with questions or comments about this presentation.



Office: DEO Bureau of One-Stop & Program Support

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

**D/B/A CAREERSOURCE
CITRUS LEVY MARION**

**Financial Statements, Supplemental
Information and Independent
Auditors' Reports**

For the Fiscal Year Ended June 30, 2021

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

**D/B/A CAREERSOURCE
CITRUS LEVY MARION**

**Financial Statements, Supplemental
Information and Independent
Auditors' Reports**

For the Fiscal Year Ended June 30, 2021

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Powell & Jones
Certified Public Accountants

Richard C. Powell, Jr., CPA
Marian Jones Powell, CPA

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INDEPENDENT AUDITORS' REPORT

Board of Directors
Citrus, Levy, Marion Regional Workforce Development Board, Inc.
Ocala, Florida

We have audited the accompanying financial statements of the governmental activities and the major fund of Citrus, Levy, Marion Regional Workforce Development Board, Inc. d/b/a CareerSource Citrus Levy Marion (the Board), as of and for the year ended June 30, 2021 and the related notes to the financial statements, which collectively comprise the Board's basic financial statements as listed in the table of contents.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express opinions on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the governmental activities and major fund of the Board as of June 30, 2021, and the respective changes in financial position for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Other Matters—Required Supplementary Information

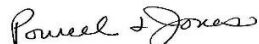
Accounting principles generally accepted in the United States of America require that management's discussion and analysis (pages 5 - 8) and budgetary comparison information (page 23) be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Other Matters—Other Information

Our audit was conducted for the purpose of forming opinions on the financial statements as a whole. The accompanying Schedule of Expenditures of Federal Awards is presented for the purposes of additional analysis as required by Title 2 U.S. Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the Schedule of Expenditures of Federal Awards is fairly stated, in all material respects, in relation to the financial statements as a whole.

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated February 7, 2022, on our consideration of the Board's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Board's internal control over financial reporting and compliance.



POWELL & JONES
Certified Public Accountants
Lake City, Florida
February 7, 2022

CITRUS, LEVY, MARION REGIONAL WORKFORCE DEVELOPMENT BOARD, INC.
MANAGEMENT'S DISCUSSION AND ANALYSIS
June 30, 2021

This discussion and analysis of the financial performance of Citrus, Levy, Marion Regional Workforce Development Board, Inc. (the Board) provides an overview of financial activities for the fiscal year ended June 30, 2021. Please read it in conjunction with the financial statements which follow this section.

FINANCIAL HIGHLIGHTS

The following are various financial highlights:

- Overall net position increased by \$240,731.
- Unrestricted net position at June 30, 2021, was \$448,368.
- The Board incurred total expenses for the year of about \$7,268,402, compared to revenues of approximately \$7,509,133.

OVERVIEW OF THE BASIC FINANCIAL STATEMENTS

This discussion and analysis is intended to serve as an introduction to the Board's basic financial statements. These basic statements consist of government-wide financial statements, fund financial statements and notes to the financial statements. The government-wide financial statements present an overall picture of the Organization's financial position and results of operations. The fund financial statements present financial information for the General Fund of the Organization. The notes to the financial statements provide additional information concerning the Organization's finances that are not disclosed in the government-wide or fund financial statements.

Government-Wide Financial Statements and Governmental Fund Financial Statements - All of the activities of the Organization are considered to be governmental activities. The Organization has no business-type activities, which are generally financed in whole or in part by fees charged to external parties for goods or services.

The *government-wide financial statements* provide both long-term and short-term information about the overall financial status of the Organization. These statements use a format similar to a private sector business and are presented on the accrual basis. They include a statement of net position and a statement of activities.

The first financial statement is the *Statement of Net Position*. This government-wide financial statement includes long-term information such as capital assets and long-term liabilities, if any. The amounts in this statement are accounted for using the accrual basis of accounting. Accrual accounting is similar to the accounting used by most private-sector companies. All of the current year revenues and expenses are recorded, regardless of when cash is received or paid. Net position, the difference between these assets and liabilities, is a useful way to measure the financial health of the Organization.

The second financial statement is the *Statement of Activities*. This statement includes all of the revenues and expenses of the Organization and reconciles beginning and ending net position.

- This government-wide financial statement includes all of the current year revenues and expenses, regardless of when cash is received or paid. The amounts in this statement are accounted for using the accrual basis of accounting as discussed above. Over time, the increases or decreases in net position are useful indicators of whether the financial health of the Organization is improving or deteriorating. However, other non-financial factors, such as changes in population and in federal funding, must also be considered when assessing the overall health of the Board.

The *governmental fund financial statements* provide information on the current assets and liabilities of the General Fund, changes in current financial resources (revenues and expenditures) and current available resources.

- The *General Fund Balance Sheet* focuses on events that produce near-term inflows and outflows of spendable resources as well as on the balances of spendable resources available at the end of the year. The amounts are accounted for using modified accrual accounting. Modified accrual accounting focuses on available cash and other financial assets that can readily be converted to cash. This provides a shorter-term view of the governmental fund's financial position.
- The *General Fund Statement of Revenues, Expenditures and Changes in Fund Balance* focuses on events that produce near-term inflows and outflows of spendable resources, as well as on the balances of spendable resources available at the end of the year. These amounts are accounted for using modified accrual accounting, as discussed above.

CONDENSED FINANCIAL INFORMATION

The following tables present condensed, government-wide current year and prior year data about net position and changes in net position:

Net Position	2021 Governmental Activities	2020 Governmental Activities
Assets:		
Non-capital assets	\$ 1,447,279	\$ 1,028,171
Depreciable capital assets, net	6,319	8,094
Total assets	<u>1,453,598</u>	<u>1,036,265</u>
Liabilities:		
Current liabilities	593,771	498,675
Non-current liabilities	405,140	323,634
Total liabilities	<u>998,911</u>	<u>822,309</u>
Net assets:		
Net investment in capital assets	6,319	8,094
Unrestricted	448,368	205,862
Total net position	<u>\$ 454,687</u>	<u>\$ 213,956</u>

Change in Net Position	2021 Governmental Activities	2020 Governmental Activities
General revenues:		
Governmental grants and contributions	\$ 7,406,896	\$ 7,408,213
Other revenues	102,237	193,771
Total revenues	<u>7,509,133</u>	<u>7,601,984</u>
Program expenses:		
Administration and general	859,471	791,971
Client services:		
Direct and contract provided	6,407,156	6,861,488
Depreciation	1,775	1,775
Total expenses	<u>7,268,402</u>	<u>7,655,234</u>
Change in net position	240,731	(53,250)
Beginning net position	213,956	267,206
Ending net position	<u>\$ 454,687</u>	<u>\$ 213,956</u>

OVERALL FINANCIAL POSITION AND RESULTS OF OPERATIONS

Governmental Activities

The governmental activities generated program income of \$101,154, interest income of \$1,083 and grant and contractual revenue of \$7,406,896. The Organization incurred \$7,268,402 of program expenses. This resulted in an increase in net position of \$213,956.

General Fund

The fund balance of the General Fund has increased by \$324,012, from \$529,496 to \$853,508. This change is due to budgetary management and the fact that almost all of the operations of the Organization are funded by grantors. There is an assignment of fund balance for an accrued leave liability of \$405,140 and a non-spendable balance of \$45,622 for prepaid expenses and deposits. Unassigned fund balance was \$402,746.

BUDGETARY HIGHLIGHTS

General Fund. The original budget was based on funding projections and included all funds expected to be available. During the year the budget is amended as funding commitments are received. Finally, the final budget is adjusted for estimates of amounts to be carried forward to subsequent years. The budget for the 2021 fiscal year was increased by \$835,075. Budgeted expenditures exceeded actual by \$1,475,309.

CAPITAL ASSETS AND DEBT ADMINISTRATION

Capital Assets

The Organization had no significant capital asset activity for the fiscal year ended June 30, 2021. Please refer to a note to the accompanying financial statements entitled *Capital Assets and Depreciation* for more detailed information about the Organization's capital asset activity.

Debt Administration

The Organization's only long-term debt is its accrual for compensated absences. Please refer to a note to the accompanying financial statements entitled *Long Term Liabilities* for more detailed information about long-term debt activity.

ECONOMIC FACTORS

The Organization currently is not aware of any conditions that are expected to have a significant effect on the Organization's financial position or results of operations.

CONTACTING FINANCIAL MANAGEMENT

This financial report is designed to provide a general overview of the finances of the Organization and to show accountability for the money it receives. If you have any questions about this report or need additional financial information, contact Susan Heller, Vice President of Finance, Citrus, Levy, Marion Regional Workforce Development Board, Inc., 3003 SW College Road, Suite 107, Ocala, FL 34474.

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

STATEMENT OF NET POSITION

JUNE 30, 2021

Assets:	
Cash	\$ 485,430
Grants Receivable	859,097
Accounts and Contracts Receivable	57,130
Prepaid Expenses	38,636
Deposits	6,986
Depreciable Capital Assets, Net of Depreciation	6,319
Total Assets	<u><u>\$1,453,598</u></u>
Liabilities:	
Accounts Payable and Accrued Expenses	\$ 351,716
Unearned Revenue	242,055
Accrued Compensated Absences	405,140
Total Liabilities	<u><u>998,911</u></u>
Net Position:	
Net Investment in Capital Assets	6,319
Unrestricted	448,368
Total Net Position	<u><u>\$ 454,687</u></u>

See notes to financial statements.

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

STATEMENT OF ACTIVITIES

FOR THE FISCAL YEAR ENDED JUNE 30, 2021

Functions/Programs	Program Expenses		Program Revenue		Net (Expenses) Revenue and Changes in Net Position
	Direct	Indirect	Operating Grants and Contributions	Capital Grants and Contributions	Governmental Activities
Governmental activities:					
Economic environment					
Jobs training and placement	\$ 6,408,931	\$ 859,471	\$ 7,406,896	\$ -	\$ 138,494
Total governmental activities	<u>\$ 6,408,931</u>	<u>\$ 859,471</u>	<u>\$ 7,406,896</u>	<u>\$ -</u>	<u>\$ 138,494</u>
				General revenue:	
				Interest	1,083
				Other	<u>101,154</u>
				Total general revenue	<u>102,237</u>
				Changes in net position	240,731
				Net position, beginning of year	<u>213,956</u>
				Net position, end of year	<u>\$ 454,687</u>

See notes to financial statements.

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

**GOVERNMENTAL FUND
BALANCE SHEET
JUNE 30, 2021**

Assets:	<u>General Fund</u>
Cash	\$ 485,430
Grants Receivable	859,097
Accounts and Contracts Receivable	57,130
Prepaid Expenses	38,636
Deposits	6,986
Total Assets	<u><u>\$1,447,279</u></u>
 Liabilities:	
Accounts Payable and Accrued Expenses	\$ 351,716
Unearned Revenue	242,055
Total Liabilities	<u>593,771</u>
 Fund Balance:	
Non-spendable - Deposits and Prepaid Expenses	45,622
Assigned - Compensated Absences	405,140
Unassigned	402,746
Total Fund Balance	<u>853,508</u>
 Amounts reported for governmental activities in the Statement of Net Position are different because:	
Capital assets used in governmental activities are not financial resources and, therefore, are not reported in the funds.	6,319
 Long-term liabilities are not due and payable in the current period and , therefore, are not reported in the funds.	(405,140)
Net position of governmental activities	<u><u>\$ 454,687</u></u>

See notes to financial statements.

CITRUS, LEVY, MARION REGIONAL WORKFORCE DEVELOPMENT BOARD, INC.
GOVERNMENTAL FUND
STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
FOR THE FISCAL YEAR ENDED JUNE 30, 2021

		General Fund
Revenues:		
Grants and contributions	\$	7,406,896
Other Income		101,154
Interest Income		1,083
Total Revenues		7,509,133
Expenditures:		
Indirect:		
Administrative		716,324
General		143,147
Client Services:		
Training		798,851
Operating:		
Supportive services and other		1,641,247
Contracted Provider		823,292
Program support		3,062,260
Total Expenses/Expenditures		7,185,121
Total Change in Fund Balance		324,012
Fund Balance, July 1, 2020		529,496
Fund Balance, June 30, 2021	\$	853,508

See notes to financial statements.

CITRUS, LEVY, MARION REGIONAL WORKFORCE DEVELOPMENT BOARD, INC.
RECONCILIATION OF THE STATEMENT OF REVENUES, EXPENDITURES, AND CHANGES
IN FUND BALANCE OF THE GOVERNMENTAL FUND TO THE STATEMENT OF ACTIVITIES
FOR THE FISCAL YEAR ENDED JUNE 30, 2021

Amounts reported for governmental activities are different because:

Net change in fund balance - governmental fund	\$ 324,012
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The governmental fund reports capital outlays as expenditures. However, in the statement of activities the cost of those assets is allocated over their estimated useful lives and reported as depreciation expense. This is the amount by which depreciation exceeded capital outlay in the current period.	(1,775)
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Some expenses in the statement of activities do not require the use of current financial resources and, therefore, are not reported as expenditures in the governmental funds. This amount represents the increase in accrued compensated absences for the current period.	(81,506)
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Change in net position of governmental activities	\$ 240,731
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See Notes to Financial Statements.

CITRUS, LEVY MARION REGIONAL WORKFORCE DEVELOPMENT BOARD, INC.
NOTES TO FINANCIAL STATEMENTS
June 30, 2021

NOTE 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Financial Reporting Entity

Citrus, Levy, Marion Regional Workforce Development Board, Inc. d/b/a CareerSource Citrus Levy Marion (the Organization) was incorporated as a nonprofit Organization on June 17, 1996; under the provisions of the Florida Not-For-Profit Organization Act set forth in Chapter 617, Florida Statutes. The Organization exists as a result of the passage of the Workforce Florida Act of 1996, as subsequently amended, and the Inter-local Agreement establishing the Citrus, Levy, Marion Workforce Development Consortium. The Organization has been determined to be a special district within the meaning of the Uniform Special District Accountability Act of the laws of the State of Florida. The Organization is a special-purpose government.

The purpose of the Organization is to fulfill those duties and responsibilities provided for by the Workforce Innovation and Opportunity Act, the Personal Responsibility and Work Opportunity Reconciliation Act of 1996, the Balanced Budget Act of 1997 and the Workforce Florida Act of 1996, as amended; consistent with the provisions of job training, job placement and benefit services to the citizens of Citrus, Levy and Marion Counties, Florida.

The governing board of the Organization is the Board of Directors. As required by generally accepted accounting principles, the financial statements of the reporting entity include those of the Organization (the primary government unit) and its component units. There were no entities that required inclusion as a component unit within the Organization's financial statements.

Basis of Presentation

The basic financial statements have been prepared in conformity with the accounting principles and reporting guidelines established by the Governmental Accounting Standards Board (GASB).

Basis of Accounting and Measurement Focus

The government-wide financial statements are reported using the economic resources measurement focus and the accrual basis of accounting. Revenues are recorded when earned and expenditures are recorded when a liability is incurred, regardless of the timing of related cash flows.

Governmental fund financial statements are reported using the current financial resources measurement focus and the modified accrual basis of accounting. Revenues are recognized as soon as they are both measurable and available. Revenues are considered to be available

when they are collectible within the current period or soon enough thereafter to pay liabilities of the current period. For this purpose, the Organization considers revenues to be available if they are collected within 60 days of the end of the current fiscal period. Expenditures generally are recorded when a liability is incurred, as under accrual accounting. However, expenditures related to compensated absences are recorded only when payment is due.

The Organization uses the following fund type - the General Fund. This fund is the Organization's only operating fund. It is used to account for all revenues and expenditures applicable to the general operations of the Organization. The fund is charged with all costs of operations.

Budgets and Budgetary Process

The Board of Directors adopts an annual operating budget, which can be amended by the Organization throughout the year. The budget is adopted using the same basis of accounting that is used to reflect actual revenues and expenditures.

Functional Allocation of Expenses

The costs of providing the various programs and other activities of the Organization have been summarized on a functional basis in the Statement of Activities. Certain costs are allocated to the various programs and supporting services of the Organization based on the Cost Allocation Plan submitted to and approved by the U.S. Department of Labor. Costs that are directly related to the Organization's specific purposes have been recorded as direct expense and included as program services. Costs which are directly shared have been allocated among programs and supporting services based upon personnel activity reports or another allocation base which reflects the proportionate share of the benefits received. Indirect costs are allocated to benefiting programs based upon an indirect cost rate approved by the U.S. Department of Labor.

Receivables

All receivables are reported at their gross value and, where appropriate, are reduced by the estimated portion that is expected to be uncollectible. No portion of receivables has been estimated as uncollectible by the Organization. All receivables are considered fully collectible.

Fund Balance

Governmental funds report separate classifications of fund balance.

Non-Spendable. The non-spendable fund balance classification includes amounts that cannot be spent because they are either (a) not in spendable form or (b) legally or contractually required to be maintained intact.

Restricted. The restricted fund balance is defined as having restrictions (a) externally imposed by creditors (such as through debt covenants), grantors, contributors, or laws or regulations of other governments or (b) imposed by law through constitutional provisions or enabling legislation.

Committed. Committed fund balance is defined as amounts that can only be used for specific purposes pursuant to constraints imposed by formal action of the Organization's Board of Directors.

Assigned. Assigned fund balance is defined as amounts that are constrained by the Organization's Board of Directors' intent to be used for specific purposes, but are neither restricted nor committed. The Organization has given the authority to assign fund balance to the Executive Director. Assigned fund balance includes spendable fund balance amounts established by the Executive Director that are intended to be used for specific purposes that are neither considered restricted or committed. Assignment of fund balance may be (a) made for a specific purpose that is narrower than the general purposes of the government itself; and/or (b) used to reflect the appropriation of a portion of existing unassigned fund balance to eliminate a projected deficit in the subsequent year's budget in an amount no greater than the projected excess of expected expenditures over expected revenues. Assigned fund balance shall reflect management's intended use of resources as set forth each year by the Executive Director. Assigned fund balance may or may not be appropriated for expenditure in the subsequent year depending on the timing of the project/reserve for which it was assigned.

Unassigned. Unassigned fund balance is the residual classification for the general fund.

It is the policy of the Organization that they will use restricted resources to the extent that they are available, then committed resources, followed by assigned resources. Once these are consumed, the Organization will then use unassigned resources. The Organization does not have a formal policy requiring a minimum fund balance.

Accounting Estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenditures/expenses during that reported period. Actual results could differ from those estimates.

Property and Equipment

Property and equipment acquired are recorded as expenditures in governmental funds and are stated at cost in the government-wide statements. Property and equipment are defined by the Organization as assets with an initial, individual cost of \$5,000 or more and an estimated useful life of more than one year. Depreciation has been recorded using the straight-line method over estimated useful lives of 3 to 20 years as follows:

<u>Assets</u>	<u>Years</u>
Office Equipment	7
Miscellaneous Equipment	20
Data Processing Equipment	3 - 15

Pension Plan

The provision for pension cost is recorded on an annual basis. The Organization's policy is to fund pension costs as they accrue. See Note 5.

Cash

The Organization pools cash resources of its various programs to facilitate the management of cash. Cash applicable to a particular program is readily identifiable. The balance in the pooled cash accounts is held at a bank that is a member of the State of Florida pool for pledging securities against fund deposits and is available to meet current operating requirements. As a result, the Organization has no need for a policy regarding deposit custodial credit risk.

Prepaid Items

Certain payments to vendors reflect costs applicable to future accounting periods and are recorded as prepaid items in both government-wide and fund financial statements. Prepaid assets are reported as “non-spendable” in the fund financial statements to indicate that prepaid amounts do not represent available expendable resources.

Vacation, Sick Leave, and Other Compensated Absences

The Organization's employees are entitled to certain compensated absences based on length of employment and other factors. With minor exceptions, compensated absences either vest or accumulate and are accrued when they are earned. Compensated absences are accrued at June 30, 2021, in the amount of \$405,140. See Note 4.

Post Employment Healthcare Benefits

The Organization does not provide post employment healthcare benefits except those mandated by the Consolidated Omnibus Budget Reconciliation Act (COBRA). The requirements established by COBRA are fully funded by employees who elect coverage under the Act, and no direct costs are incurred by the Organization.

Fair Value of Financial Instruments

The following methods and assumptions were used to estimate fair value of each class of financial instruments for which it is feasible to estimate that value:

Cash, Accounts Receivable and Accounts payable – Carrying amount approximates fair value due to the short maturity of these financial instruments.

NOTE 2. GOVERNMENT-WIDE VS. FUND FINANCIAL STATEMENTS

Governmental Fund Balance Sheet to Statement of Net Position - Amounts reported for Governmental activities in the Statement of Net Assets are different because:

Capital assets - Capital assets used in governmental activities are not reported in the governmental funds.

Cost of capital assets	\$ 465,652
Accumulated depreciation	(459,333)
	<u>\$ 6,319</u>

Long-term liabilities - Long-term liabilities are not reported in the governmental funds.

Compensated absences	<u>\$ 405,140</u>
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Governmental Fund Revenues, Expenditures and Changes in Fund Balance to Statement of Activities - Amounts reported for governmental activities in the Statement of Activities are different because:

Governmental funds report capital outlays as expenditures. However, in the Statement of Activities, the cost of those assets is depreciated over their estimated useful lives.

Current year depreciation expense	<u>\$ (1,775)</u>
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An increase in compensated absences liability decreases net position, but has no effect on fund balance.

Current year net increase in compensated absences	<u>\$ (81,506)</u>
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NOTE 3. CAPITAL ASSETS AND DEPRECIATION

Capital asset activity for the year ended June 30, 2021, was as follows:

	Balance July 1, 2020	Additions	Deletions	Balance June 30, 2021
Capital assets being depreciated:				
Office equipment	\$ 34,600	\$ -	\$ -	\$ 34,600
Miscellaneous equipment	300,672	-	-	300,672
Data processing equipment	130,380	-	-	130,380
Total capital assets being depreciated	<u>465,652</u>	<u>-</u>	<u>-</u>	<u>465,652</u>
Accumulated depreciation:				
Office equipment	34,600	-	-	34,600
Miscellaneous equipment	297,575	348	-	297,923
Data processing equipment	125,383	1,427	-	126,810
Total accumulated depreciation	<u>457,558</u>	<u>1,775</u>	<u>-</u>	<u>459,333</u>
Net capital assets being depreciated	<u>\$ 8,094</u>	<u>\$ (1,775)</u>	<u>\$ -</u>	<u>\$ 6,319</u>

NOTE 4. LONG-TERM LIABILITIES

Long-term liabilities consist of compensated absences:

	Balance July 1, 2020	Additions	Deletions	Balance June 30, 2021
Compensated absences	\$ 323,634	\$ 81,506	\$ -	\$ 405,140

NOTE 5. PENSION PLAN

The Organization authorized the establishment of a defined contribution benefit plan as governed by Section 403(b) of the Internal Revenue Code. All employees 18 years or older are eligible to participate. Employees may contribute to the plan by entering into a salary reduction agreement with the Organization. The Organization shall determine on an annual basis, at its sole discretion, the amount of employer contributions to be made to the plan for each plan year. Employee participants shall at all times have a fully vested and non-forfeitable interest in their account. The plan is administered by the Variable Annuity Life Insurance Company (Valic). The following is a schedule of contributions to the plan for the last three years.

Year Ended June 30	Organization Contributed
2019	\$ 189,301
2020	189,400
2021	187,016

NOTE 6. OBLIGATION UNDER OPERATING LEASES

The Organization leases office space under contracts accounted for as operating leases. Total lease expense, net, for the period ended June 30, 2021, were \$274,935. Minimum future lease payments under these operating leases are as follows:

For the Year Ended June 30	
2022	\$ 298,716
2023	266,895
2024	243,749
	<u>\$ 809,360</u>

NOTE 7. SERA RECONCILIATION

Reconciliations of the Organization's financial records to the expenditures reported in the Subrecipient Enterprise Resource Application (SERA) are required to be completed monthly by the Organization for all awards from the Department of Economic Opportunity (DEO). These reconciliations were completed as required, and the Organization's financial records are reconciled with the reported expenditures in SERA for the year ended June 30, 2021.

NOTE 8. COMMITMENTS, CONTINGENCIES, AND CLAIMS

The Organization receives substantially all of its support through federal and state funding. A significant reduction in the level of this support, if this were to occur, would have an effect on the Organization's programs and activities.

Grants require the fulfillment of certain conditions set forth in the instrument of the grant. Failure to fulfill the conditions could result in the return of the funds to grantors. Although this is a possibility, the Board and Management deems the contingency remote.

In March, 2020 the World Health Organization made the assessment that the outbreak of a novel corona virus (COVID-19) was characterized as a pandemic. As a result, uncertainties have arisen that may have a significant negative impact on the operating activities and results of operations of the Organization. The occurrence and extent of such an impact will depend on future developments, including (i) the duration and spread of the virus, (ii) government quarantine measures, (iii) voluntary and precautionary restrictions on travel and meetings, (iv) the effects on the financial markets, and (v) the effects on the economy overall, all of which are uncertain.

NOTE 9. RISK MANAGEMENT

The Organization is exposed to various risks of loss, including general liability, personal injury, workers compensation, and errors and omissions. To manage its risks, the Organization has purchased commercial insurance. Settled claims resulting from these risks have not materially exceeded commercial coverage in the current and previous three years.

NOTE 10. FAIR VALUE MEASUREMENTS

At June 30, 2021, the Organization had no assets or liabilities subject to disclosure of fair value measurements as to valuation levels hierarchy per Financial Accounting Standards Board Statement No. 157.

NOTE 11. RELATED PARTY BALANCES AND TRANSACTIONS

The Organization has entered into contractual agreements with local colleges and community organizations, several of which have delegates on the Board of Directors, to carry out its training programs. All of the contracts were approved by the Board of Directors in accordance with procedures established by the Florida Department of Economic Opportunity. These procedures require a two-thirds majority vote of the Board of Directors in favor with the related party abstaining from the vote. Utilization of these training vendors is the decision of the individual participant. Payments made for these services were as follows for the year ended June 30, 2021:

Description	Amount Paid	Payable at June 30, 2021
Training	\$ 99,157	\$ -
Rent	159,684	-
Memberships	51,026	4,750
	<u>\$ 309,867</u>	<u>\$ 4,750</u>

NOTE 12. INCOME TAXES

The Organization has been granted an exemption from income taxes under Internal Revenue Code, Section 501(c)(3) as a nonprofit corporation. As required by Internal Revenue Service regulations, the Organization annually files a Form 990, "Return of Organization Exempt from Income Tax" with the Internal Revenue Service. The returns for 2021, 2020 and 2019 are subject to review and adjustment by the Internal Revenue Service. Management has evaluated the effect of the guidance provided by U.S. Generally Accepted Accounting Principles on Accounting for Uncertainty in Income Taxes. Management believes that the Organization continues to satisfy the requirements of a tax-exempt organization at June 30, 2021. Management has evaluated all other tax positions that could have a significant effect on the financial statements and determined the Organization had no uncertain income tax positions.

NOTE 13. SUBSEQUENT EVENTS

The Workforce Board has evaluated events and transactions for potential recognition of disclosure in the financial statements through February 7, 2022, the date that the audit report was available to be issued.

REQUIRED SUPPLEMENTARY INFORMATION

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

**STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
BUDGET AND ACTUAL
GENERAL FUND**

FOR THE FISCAL YEAR ENDED JUNE 30, 2021

	<u>Original Budget</u>	<u>Final Budget</u>	<u>Actual</u>	<u>Variance With Final Budget Positive (Negative)</u>
Revenues				
Grants and contributions	\$ 7,825,355	\$ 8,660,430	\$ 7,406,896	\$ (1,253,534)
Other Income	-	-	101,154	101,154
Interest Income	-	-	1,083	1,083
Total Revenues	<u>7,825,355</u>	<u>8,660,430</u>	<u>7,509,133</u>	<u>(1,151,297)</u>
Expenses/Expenditures				
Indirect:				
Administrative	663,304	669,526	716,324	(46,798)
General	166,684	161,706	143,147	18,559
Client Services:				
Training	670,923	899,552	798,851	100,701
Operating:				
Supportive services and other	1,700,959	2,045,307	1,641,247	404,060
Contracted Provider	1,032,447	1,294,545	823,292	471,253
Program support	3,591,038	3,589,794	3,062,260	527,534
Total Expenses/Expenditures	<u>7,825,355</u>	<u>8,660,430</u>	<u>7,185,121</u>	<u>1,475,309</u>
Excess of Revenues over Expenditures	-	-	324,012	324,012
Fund Balance, July 1, 2020	529,496	529,496	529,496	-
Fund Balance, June 30, 2021	<u>\$ 529,496</u>	<u>\$ 529,496</u>	<u>\$ 853,508</u>	<u>\$ 324,012</u>

See notes to Required Supplementary Information.

CITRUS, LEVY, MARION REGIONAL WORKFORCE DEVELOPMENT BOARD, INC.
NOTES TO REQUIRED SUPPLEMENTARY INFORMATION
For the Fiscal Year Ended June 30, 2021

A. Budgetary Information:

An annual budget is adopted on a basis consistent with accounting principles generally accepted in the United States of America for the general fund. All annual appropriations lapse at fiscal year end.

The Organization generally follows these procedures in establishing the budgetary data for the general fund as reflected in the financial statements:

1. Prior to June 30, the Executive Director submits to the Board of Directors a proposed operating budget for the fiscal year commencing the following July. The operating budget includes proposed expenditures and the means of financing them.
2. Public hearings are conducted following preliminary examination and revision of the proposed operating budget by the Board.
3. After public hearings and necessary revisions have been completed, the budget is approved.
4. The legal level of budgetary control is the fund level.
5. Formal budgetary integration is employed as a management control device during the year for the General Fund.
6. The budget for the General Fund is adopted on a basis consistent with accounting principles generally accepted in the United States of America.

B. Excess of Appropriations Over Expenditures

Appropriations were greater than expenditures in the General Fund.

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

SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

For the Year Ended June 30, 2021

<u>Federal Grantor/Program Title</u>	<u>Contract Number</u>	<u>Federal CFDA Number</u>	<u>Federal Expenditures</u>
<u>U.S. Department of Agriculture</u>			
Passed through the Florida Department of Economic Opportunity			
Supplemental Nutrition Assistance Program	FSH20	10.561	\$ 63,380
Supplemental Nutrition Assistance Program	FSH21	10.561	192,238
Total U.S. Department of Agriculture			<u>255,618</u>
<u>U.S. Department of Labor:</u>			
Youthbuild	YB-31044-17-60-A-12	17.274	17,915
Youthbuild	YB-34257-19-60-A-12	17.274	174,456
			<u>192,371</u>
Passed through the Florida Department of Economic Opportunity			
Workforce Innovation and Opportunity Act (WIOA) Cluster:			
WIOA Adult	WIA21	17.258	1,228,967
WIOA Sector Strategies - Bridge to Skilled Trades	WIS19	17.258/17.259/17.278	15,332
WIOA Apprenticeship Expansion	WIS19	17.258/17.259/17.278	7,906
WIOA - State Level Emerging Initiatives - Foundational Skills	WIS19	17.258/17.259/17.278	20,771
WIOA Sector Strategies	WIS19	17.258/17.259/17.278	25,089
WIOA COVID-19 PPE	WIS19	17.258/17.259/17.278	927
WIOA SFY19-20 Apprenticeship Expansion	WIS20	17.258/17.259/17.278	49,706
WIOA SFY20-21 Supplemental WIOA	WIS20	17.258/17.259/17.278	330,297
WIOA Youth	WIY20	17.259	893,689
WIOA Youth	WIY21	17.259	996,282
WIOA SFY 20-21 WIOA Rural Initiatives	WIS19	17.259	31,251
WIOA Dislocated Worker	WID20	17.278	4,574
WIOA Dislocated Worker	WID21	17.278	774,812
WIOA - State Level SFY19-20 Performance Incentives	WRS19	17.278	168
Total WIA Cluster			<u>4,379,771</u>
WIOA National Emergency COVID 19	WNC20	17.277	<u>183,030</u>
Employment Services Cluster:			
Wagner Peyser	WPA20	17.207	\$ 7,437
Wagner Peyser	WPA21	17.207	147,963
Disabled Veterans Outreach Program	DVP20	17.801	16,964
Disabled Veterans Outreach Program	DVP21	17.801	7,670
Local Veterans Program+	LVR21	17.801	11,004
Total Employment Services Cluster			<u>191,038</u>
Unemployment Compensation:			
Reemployment and Eligibility Assessments	UCR19	17.225	2,758
Reemployment and Eligibility Assessments	UCR20	17.225	63,545
			<u>66,303</u>
Trade Adjustment Assistance:			
Trade Adjustment Assistance - Case Management	TAC19	17.245	3,022
			<u>3,022</u>
Total U.S. Department of Labor			<u>5,015,535</u>

(Continued)

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

**SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS
(Continued)
For the Year Ended June 30, 2021**

<u>Federal Grantor/Program Title</u>	<u>Contract Number</u>	<u>Federal CFDA Number</u>	<u>Federal Expenditures</u>
<u>U.S. Department of Health and Human Services</u>			
Passed through the Florida Department of Economic Opportunity			
Welfare Transition	WTS20	93.558	\$ 666,562
Welfare Transition	WTS21	93.558	<u>1,176,539</u>
Total U.S. Department of Health and Human Services			<u>1,843,101</u>
Total Federal Expenditures			<u>\$ 7,114,254</u>

See notes to the Schedule of Expenditures of Federal Awards.

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

**NOTES TO THE SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS
For the Year Ended June 30, 2021**

NOTE 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

The accounting policies and presentation of the Single Audit Report of the Citrus, Levy, Marion Regional Workforce Development Board, Inc. have been designed to conform to generally accepted accounting principles as applicable to governmental units, including the reporting and compliance requirements described in the OMB Compliance Supplement, Title 2 U.S. Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance).

Reporting Entity

The reporting entity consists of Citrus, Levy, Marion Regional Workforce Development Board, Inc., the primary government. Management has determined that there are no component units.

A. Basis of Accounting

Basis of accounting refers to when revenues and expenditures or expenses are recognized in the accounts and reported in the financial statements. Basis of accounting relates to the timing of the measurements made, regardless of the measurement focus.

The modified accrual basis of accounting is followed in the Schedule of Expenditures of Federal Awards. Under the modified accrual basis, revenues are recognized when they become measurable and available. Revenues are considered to be available when they are collectible within the current period or soon enough thereafter to pay liabilities of the current period. For this purpose, the County considers revenues to be available if they are collected within 60 days after the end of the current fiscal period. Expenditures generally are recorded when a liability is incurred, as under accrual accounting.

NOTE 2. INDIRECT COST RATE

Citrus, Levy, Marion Workforce Development Board, Inc. did not elect to use the 10 percent de minimis indirect cost rate.

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

**NOTES TO THE SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS
For the Year Ended June 30, 2021**

NOTE 3. SUBRECIPIENT AND ONE STOP OPERATOR

The Organization provided federal awards to subrecipients and the One-Stop Provider as follows during the year ended June 30, 2021:

<u>Program</u>	<u>CFDA Number</u>	<u>Subrecipient</u>	<u>One Stop Operator</u>
Disabled Veterans Outreach Program	17.801	\$ -	\$ 1,197
Local Veterans Employment Representative	17.801	-	530
Reemployment and Eligibility Assessments	17.225	-	3,069
Supplemental Nutrition Assistance Program	10.561	-	11,771
WIOA Youth	17.259	902,120	104,586
WIOA Adult	17.258	8,101	76,952
WIOA Dislocated Worker	17.278	8,732	35,346
WIOA National Emergency COVID 19	17.277	-	8,411
WIOA COVID-19 PPE	17.258/17.259/17.278	-	20
WIOA Rural Initiatives	17.258/17.259/17.278	-	1,541
WIOA Emerging Initiatives	17.258/17.259/17.278	-	1,605
WIOA Apprenticeship	17.258/17.259/17.278	-	2,289
Wagner Peysner	17.207	-	8,714
Welfare Transition	93.558	-	85,890
Youthbuild	17.274	177,445	-
		<u>\$ 1,096,398</u>	<u>\$ 341,921</u>

NOTE 4. ALLOCATION OF WIOA FUNDING

Funds received from DEO grants under Contract numbers WIS19 and WIS20 were allocated to Federal CFDA numbers as follows:

	<u>Federal CFDA Number</u>	<u>WIS19</u>	<u>WIS20</u>
WIOA Adult	17.258	\$ 23,108	\$ 121,601
WIOA Youth	17.259	23,108	121,601
WIOA Dislocated Worker	17.278	23,809	136,801
		<u>\$ 70,025</u>	<u>\$ 380,003</u>

MANAGEMENT LETTER

Board of Directors
Citrus, Levy, Marion Regional Workforce Development Board, Inc.
Ocala, Florida

We have audited the financial statements of Citrus, Levy, Marion Regional Workforce Development Board, Inc. (the Organization) as of and for the fiscal year ended June 30, 2021, and have issued our report thereon dated February 7, 2022.

We conducted our audit in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; the audit requirements of Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance); and Chapter 10.550, *Rules of the Florida Auditor General*. We have issued our Independent Auditor's Report on Internal Control over Financial Reporting and Compliance and Other Matters Based on an Audit of the Financial Statements Performed in Accordance with *Government Audit Standards*, Independent Auditor's Report on Compliance for Each Major Federal Program and on Internal Control over Compliance Required by the Uniform Guidance and Schedule of Findings and Questioned Costs; and Independent Accountant's Report on an examination conducted in accordance with the American Institute of Certified Public Accountants Professional Standards, AT-C Section 315, regarding compliance requirements in accordance with Chapter 10.550, *Rules of the Auditor General*. Disclosures in those reports and schedule, which are dated February 7, 2022, should be considered in conjunction with this management letter.

Additionally, our audit was conducted in accordance with:

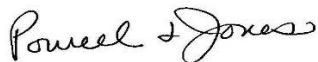
- Chapter 10.550, *Rules of the Auditor General*, which governs the conduct of local governmental entity audits performed in the State of Florida.
- Special audit guidance provided by the Department of Economic Opportunity (DEO).

This letter includes the following information, which is not included in the aforementioned auditor's reports or schedule:

- Section 10.554(1)(i)1. *Rules of the Auditor General*, requires that we determine whether or not corrective actions have been taken to address findings and recommendations made in the preceding annual financial audit report. There were no findings or recommendations made in the preceding annual financial audit report.
- Section 10.554(1)(i)2., *Rules of the Auditor General*, requires that we address in the management letter any recommendations to improve financial management. The special audit guidance provided by DEO requires disclosure in this management letter for those findings and observations not otherwise included in the

aforementioned auditor's reports or schedule. In connection with our audit, we did not have any such findings, observations, or recommendations.

- Section 10.554(1)(i)3., *Rules of the Auditor General*, requires that we address noncompliance with provisions of contracts or grant agreements; or abuse, that have occurred, or are likely to have occurred, that have an effect on the financial statements that is less than material but which warrants the attention of those charged with governance. In connection with our audit, we did not have any such findings.
- Section 10.554(1)(i)4., *Rules of the Auditor General*, requires that the name or official title and legal authority for the primary government and each component unit of the reporting entity be disclosed in this management letter, unless disclosed in the notes to the financial statements. See Financial Reporting Entity under Note 1 to the financial statements. The Organization does not have any component units.
- Section 10.554(1)(i)5.a. and 10.556(7), *Rules of the Auditor General*, requires us to apply appropriate procedures and communicate the results of our determination as to whether or not the Organization has met one or more of the conditions described in Section 218.503(1), Florida Statutes, and to identify the specific condition(s) met. In connection with our audit, we determined that the Organization did not meet any of the conditions described in Section 218.503(1), Florida Statutes.
- Pursuant to Section 10.554(1)(i)5.b. and 10.556(8), *Rules of the Auditor General* we applied financial condition assessment procedures for the Organization. It is management's responsibility to monitor the Organization's financial condition, and our financial condition assessment was based in part on representations made by management and review of financial information provided by management.
- This management letter is intended solely for the information and use of the Legislative Auditing Committee, members of the Florida Senate and the Florida House of Representatives, the Florida Auditor General, Federal and other granting agencies, management and the Board of Directors of the Organization, and is not intended to be and should not be used by anyone other than these specified parties.



POWELL AND JONES, CPAs
February 7, 2022

REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS

Board of Directors

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

Ocala, Florida

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in the *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the governmental activities and major fund of Citrus, Levy, Marion Regional Workforce Development Board, Inc. (the Organization) as of and for the year ended June 30, 2021, and the related notes to the financial statements, which collectively comprise the Organization's basic financial statements, and have issued our report thereon dated February 7, 2022.

Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the Organization's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control. Accordingly, we do not express an opinion on the effectiveness of the Organization's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency or combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

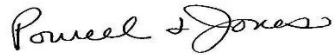
Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Compliance and Other Matters

As part of obtaining reasonable assurance about whether the Organization's financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Organization's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Organization's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

A handwritten signature in cursive script that reads "Powell & Jones".

POWELL & JONES, CPAs
February 7, 2022

**INDEPENDENT AUDITORS' REPORT ON COMPLIANCE FOR EACH MAJOR PROGRAM
AND ON INTERNAL CONTROL OVER COMPLIANCE REQUIRED BY THE UNIFORM GUIDANCE**

Board of Directors

Citrus, Levy, Marion Regional Workforce Development Board, Inc.
Ocala, Florida

Report on Compliance for Each Major Federal Program

We have audited the compliance of Citrus, Levy, Marion Regional Workforce Development Board, Inc. (the Organization) with the types of compliance requirements described in the *OMB Circular Compliance Supplement* that could have a direct and material effect on each of the Organization's major federal programs for the year ended June 30, 2021. The Organization's major federal programs are identified in the summary of auditor's results section of the accompanying Schedule of Findings and Questioned Costs.

Management's Responsibility

Management is responsible for compliance with the requirements of laws, regulations, contracts, and grants applicable to its federal programs.

Auditors' Responsibility

Our responsibility is to express an opinion on compliance for each of the Organization's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Those standards and the Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about the Organization's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of the Organization's compliance.

Opinion on Each Major Federal Program

In our opinion, the Organization complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2021.

Report on Internal Control over Compliance

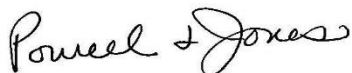
Management of the Organization is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered the Organization's internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine our auditing procedures that are appropriate in the circumstances for the purpose of expressing our opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of the Organization's internal control over compliance.

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that were not identified.

Concluding Matters

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.



POWELL & JONES, CPAs
February 7, 2022

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

**SCHEDULE OF FINDINGS
For the Fiscal Year Ended June 30, 2021**

SECTION I - SUMMARY OF AUDITOR'S RESULTS

Financial Statements

Type of auditor's report issued:	Unmodified
Internal control over financial reporting	
• Material weakness(es) identified?	No
• Significant deficiencies identified not considered to be material weaknesses?	No
Noncompliance material to financial statements noted?	No

Federal Awards

Internal control over major programs:	
• Material weakness(es) identified?	No
• Significant deficiencies identified not considered to be material weaknesses?	None reported
Type of auditor's report issued on compliance for major programs:	Unmodified
Any audit findings disclosed that are required to be reported in accordance with 2CFR 200.516(a)	No

Identification of major programs:

<u>CFDA Number/Grant Number</u>	<u>Name of Program or Cluster</u> <u>U.S. Department of Labor</u> Workforce Innovation and Opportunity Act (WIOA) Cluster:
17.258	Adult
17.259	Youth Activities
17.278	Dislocated Worker
Dollar threshold used to distinguish between Type A and Type B programs:	\$750,000
Auditee qualified as low-risk auditee?	Yes

(Continued)

CITRUS, LEVY, MARION REGIONAL WORKFORCE DEVELOPMENT BOARD, INC.
SCHEDULE OF FINDINGS
For the Fiscal Year Ended June 30, 2021
(Continued)

SECTION II - FINANCIAL STATEMENT FINDINGS

None

SECTION III - FEDERAL AWARD FINDINGS AND QUESTIONED COSTS

None

SECTION IV - SUMMARY SCHEDULE OF PRIOR AUDIT FINDINGS

None

SECTION V - OTHER

None



Powell & Jones
Certified Public Accountants

Richard C. Powell, Jr., CPA
Marian Jones Powell, CPA

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Lake City, Florida 32025
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admin@powellandjonescpa.com

Communication with Those Charged with Governance

February 7, 2022

To the Board of Directors

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

We have audited the financial statements of Citrus, Levy, Marion Regional Workforce Development Board, Inc. for the year ended June 30, 2021. Professional standards require that we provide you with information about our responsibilities under generally accepted auditing standards and *Government Auditing Standards*, as well as certain information related to the planned scope and timing of our audit. Professional standards also require that we communicate to you the following information related to our audit.

Significant Audit Findings

Qualitative Aspects of Accounting Practices

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by Citrus, Levy, Marion Regional Workforce Development Board, Inc. are described Note 1 to the financial statements. No new accounting policies were adopted and the application of existing policies was not changed during 2021. We noted no transactions entered into by the Organization during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the financial statements in the proper period.

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ significantly from those expected. There are no sensitive estimates affecting Citrus, Levy, Marion Regional Workforce Development Board, Inc.'s financial statements.

Certain financial statement disclosures are particularly sensitive because of their significance to financial statement users. There are no sensitive disclosures affecting the financial statements.

Difficulties Encountered in Performing the Audit

We encountered no significant difficulties in dealing with management in performing and completing our audit.

Corrected and Uncorrected Misstatements

Professional standards require us to accumulate all known and likely misstatements identified during the audit, other than those that are trivial, and communicate them to the appropriate level of management. There were no such misstatements identified during our audit.

Florida Institute of Certified Public Accountants • American Institute of Certified Public Accountants

Disagreements with Management

For purposes of this letter, professional standards define a disagreement with management as a financial accounting, reporting, or auditing matter, whether or not resolved to our satisfaction, that could be significant to the financial statements or the auditor's report. We are pleased to report that no such disagreements arose during the course of our audit.

Management Representations

We have requested certain representations from management that are included in the management representation letter dated February 7, 2022.

Management Consultations with Other Independent Accountants

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" on certain situations. If a consultation involves application of an accounting principle to the Organization's financial statements or a determination of the type of auditor's opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

Other Audit Findings or Issues

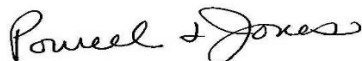
We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to retention as the Organization's auditors. However, these discussions occurred in the normal course of our professional relationship and our responses were not a condition to our retention.

Other Information in Documents Containing Audited Financial Statements

With respect to the supplementary information accompanying the financial statements, we made certain inquiries of management and evaluated the form, content, and methods of preparing the information to determine that the information complies with accounting principles generally accepted in the United States of America, the method of preparing it has not changed from the prior period, and the information is appropriate and complete in relation to our audit of the financial statements. We compared and reconciled the supplementary information to the underlying accounting records used to prepare the financial statements or to the financial statements themselves.

This information is intended solely for the use of the Audit Committee, Board of Directors and management of Citrus, Levy, Marion Regional Workforce Development Board, Inc. and is not intended to be and should not be used by anyone other than these specified parties.

Very truly yours,



Powell and Jones, CPAs
February 7, 2022

INDEPENDENT ACCOUNTANT'S REPORT

To the Governing Board
Citrus, Levy, Marion Regional Workforce Development Board Inc.

We have examined Citrus, Levy, Marion Regional Workforce Development Board Inc.'s compliance with Section 218.415, *Florida Statutes*, regarding the investment of public funds during the year ended June 30, 2021. Management is responsible for Citrus, Levy, Marion Regional Workforce Development Board Inc.'s compliance with those requirements. Our responsibility is to express an opinion on the Organization's compliance based on our examination.

Our examination was conducted in accordance with attestation standards established by the American Institute of Certified Public Accountants. Those standards require that we plan and perform the examination to obtain reasonable assurance about whether the Organization complied, in all material respects, with the requirements referenced above. An examination involves performing procedures to obtain evidence about whether the Organization complied with the specific requirements. The nature, timing and extent of the procedures selected depend on our judgment, including an assessment of the risks of material noncompliance, whether due to fraud or error. We believe that the evidence we obtained is sufficient and appropriate to provide a reasonable basis for our opinion. Our examination does not provide a legal determination on the Organization's compliance with specified requirements.

In our opinion, the Organization complied, in all material respects, with the aforementioned requirements for the year ended June 30, 2021.

This report is intended solely for the information and use of the Organization and the Auditor General, State of Florida, and is not intended to be and should not be used by anyone other than these specified parties.



POWELL & JONES
Certified Public Accountants
February 7, 2022



2022 STRATEGIC PLAN



PREPARED BY
THOMAS P. MILLER & ASSOCIATES

INTRODUCTION + ACKNOWLEDGEMENTS

CareerSource Citrus Levy Marion has developed this Strategic Plan as a multi-year roadmap for how to achieve the priorities of the local workforce development system. The Board of Directors, in coordination with leadership staff, with input from a wide range of stakeholders, crafted this plan to serve as a living tool for driving successful outcomes in the region.

Community partners, staff, and stakeholders have given their valuable time and perspective into the creation of this strategic plan. The process would not have been possible without the involvement of these groups, and CareerSource Citrus Levy Marion would like to thank them and look forward to continuing efforts to strengthen the workforce in the region.

CareerSource Citrus Levy Marion serves as the convener, conduit, and subject matter expert for workforce development activities and resources. This strategic plan is a blueprint to actualize the mission; it is a reflection of CareerSource Citrus Levy Marion's vision and priorities for the future of Central Florida. It is a plan centered around the partnership of employers, jobseekers, community organizations, and regional leadership. Articulating these goals and strategies is the result of months of working with these groups, made possible by the support of the Career Source Citrus Levy Marion Board of Directors. Each board member is acknowledged on the following page.

Draft



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Central Florida Electric Cooperative

Brandon Whiteman – Vice Chair

Two Twelve Benefits

Fredrick Morgan – Treasurer

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Angie White

Department of Education/Vocational Rehabilitation

Tiffany Wiggins

Katch 22

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It is CareerSource Citrus Levy Marion's **MISSION** to bring together residents, businesses, educational and community partners to develop services to support high-quality education, training, supportive and employment services to meet regional workforce needs.

It is CareerSource Citrus Levy Marion's **VISION** to be known as the number one workforce resource in the state of Florida by providing constructive tools and professional supportive services that are reflected in the quality of our job candidates and meet the needs of the business community.

GOALS Draft

- 1** Enhance the existing sector strategy approach, driving career pathways and systemically addressing business needs.
- 2** Leverage the strong service delivery structure to provide access to the comprehensive talent pool.
- 3** Serve as convener for talent development in the region.
- 4** Tell the talent development story of Citrus, Levy and Marion counties.

PLANNING PROCESS

The planning process for CareerSource Citrus Levy Marion's (CSCLM) updated strategic plan began in mid-2021, with leadership identifying the need for a renewed roadmap for successful initiatives the next several years. CSCLM retained Thomas P. Miller & Associates (TPMA), an Indianapolis-based consulting firm, to facilitate the strategic planning process. Over the next six months, TPMA facilitated stakeholder engagement sessions, conversations with partner organizations, meetings with staff and organizational leadership. The results were guideposts to steer TPMA and leadership to the major priorities CSCLM needed to hone in on – both internally and externally. The following section summarizes the process TPMA followed as well as data and findings collated.

Document Review

Work to define the strategic direction of CSCLM began with a level setting review on the status of the 2015 plan. Driven by the implementation of the Workforce Innovation and Opportunity Act (WIOA) of 2014, the goals in the plan were strong and served the organization well. The plan encouraged demand-driven services for businesses and jobseekers, as well as a broad partnership lens that

acknowledges the role of community-based organizations in talent development. The 2015 goals were:

- 1. Adopt a sector strategy approach that drives career pathways and addresses individual business services**
- 2. Build on the strong service delivery structure to provide access to the comprehensive talent pool**
- 3. Strengthen board member engagement**
- 4. Serve as the convener for talent development in the area**
- 5. Tell the talent development story of Citrus, Levy, and Marion Counties**

The analysis revealed that while parts of the plan can be considered complete, several other strategies can be considered ongoing goals with outputs that are continuously improved. Implementation of some goals were hampered by the Covid-19 pandemic, or progress experienced setbacks. Partnership activities that ideally would have expanded did not occur as broadly as hoped, and board member engagement continued to fluctuate as people dealt with many personal and professional issues.

An additional change to the landscape was the signing of the REACH Act

(or Reimagining Education and Career Help Act) into law by Governor DeSantis. Also known as HB 1507, the bill heavily influences the ways that Florida’s workforce system is to operate. The REACH Act aims to coordinate the state’s workforce development system including a “no-wrong-door” policy where Floridians can access services from any workforce partner with a common intake process and case management system. The implementation of the bill at the state level is ongoing with impacts continuing to unfold, but CSCLM has chosen to work on what is known now and have incorporated that strategy into the plan.

Labor Market Information Analysis

In late 2021, TPMA completed a labor market analysis detailing past, present, and projected trends in the CareerSource Citrus Levy Marion footprint. TPMA collected data from several public and proprietary sources including Economic Modeling Specialists, Inc. (Emsi), American Community Survey, U.S. Census Bureau, and the U.S. Bureau of Labor Statistics. The data analyzed contained quantitative data related to workforce characteristics, labor force statistics, industry analysis, and occupational analysis in the region. Key takeaways include above average population growth in region, as well as a strong rebound in employment post-pandemic. Surprisingly, the labor force was larger

larger in late 2021 than it was two years prior. The information was presented to CSCLM leadership and stakeholders, and was used to guide discussions with partners on growing industries, a tighter labor market, and a greying population.

Stakeholder Engagement

CSCLM indicated early on that input from partner organizations and other stakeholders would be essential to creating an inclusive and actionable plan. In October and December 2021, TPMA organized six total stakeholder engagement sessions in the three counties that CSCLM services. With assistance from CSCLM, TPMA met with representatives from over a dozen partners to solicit feedback and understand their priorities and concerns. TPMA also shared an overview of the REACH Act as it relates to mandated partnership. Given that many of these organizations will be impacted by the upcoming changes, the opportunity to set expectations early was beneficial.



Discussions involved improving partnership in the region, with representatives noting there are silos in place not only separating the three counties, but also preventing cross-collaboration across municipalities. Additionally, if CSCLM is to serve as a convener as required under the REACH Act, it should fit into existing partnerships and establishing new ones where there is a void.



Representatives also noted that the barriers to employment preventing jobseekers from obtaining or keeping employment, have multiplied and become worse, and resources should be focused on alleviating them. Examples included childcare, which is not only expensive, but also just not available in rural areas that CSCLM serves. This brought up employer investments in unique spaces, such as bringing on in-house childcare for employees.

TPMA held an additional stakeholder session with the CSCLM Board, providing feedback on strategies and identifying organizational strengths and weaknesses.

Key strengths included leadership by CSCLM staff, business services, and a responsive staff. Weaknesses included public perception of CSCLM as the unemployment office, as well as board members that could be more engaged.

Key themes that emerged from the sessions included:

- Defining Partnership**
- Skilling for the Gig Economy**
- REACH Act Implementation**
- Marketing/Outreach to Partners**
- Fund Development**
- Employer Investments (Training, Talent, and Barrier Removal)**
- High School Outreach and Programming**

Draft

MISSION + VISION

As part of the strategic planning process, CSCLM staff and board reviewed the current mission and vision statements to see if they were relevant, and reflective of the organization's future. The staff and board recommended minor revisions to the mission and vision statements.

Revised Mission Statement

CareerSource Citrus Levy Marion brings together residents, businesses, educational and community partners to develop services to support high-quality education, training, supportive and employment services to meet regional workforce needs.

Revised Vision Statement

To be known as the number one workforce resource in the state of Florida by providing constructive tools and professional supportive services that are reflected in the quality of our job candidates and meet the needs of the business community.

While staff and board members did feel that the existing mission and vision statements still aligned with the organizational goals, some changes were necessary to ensure they reflected the future of CSCLM. Requests for changes included modifying the individuals and organizations named in the mission (previously "citizens," changed to "residents," and "employers," changed to "businesses") to be broader. For example, reflecting that businesses are more than employers and that CSCLM serves any legal resident. The vision statement was modified away from a focus on customer service to highlight the tools and supportive services CSCLM provides to its dual customers – job candidates and businesses.

Draft

STRATEGIC PLAN GOALS

After participating in the mission and vision statement review and studying the findings from the labor market analysis and the stakeholder engagement, TPMA worked with the CSCLM staff and the board to review the findings, discuss the identified priorities, and set goals. This plan aspires to achieve the vision of CSCLM by leveraging existing workforce strategies being executed by partners, as well as implementing new initiatives that respond to the needs of businesses. These goals align the strategic priorities with the needs of jobseekers and businesses, while also looking ahead to the changes that the implementation of the REACH Act will bring.

Implementation of the plan will require intentional collaboration among partners

in the workforce, education, and economic development ecosystem in the region. It is important to work with businesses to ensure training pathways align with in-demand occupations, while ensuring that jobseekers are aware and interested in options available. These partners will need to have honest conversations about what will attract jobseekers to training opportunities and employers – job quality matters.

CSCLM has always had to balance both business and jobseeker demands, but the current labor market will require a new strategy than in years past. Citrus, Levy, and Marion Counties are poised to take advantage of the growth in the region, and the strategies outlined below will guide the workforce ecosystem in making that a reality.

Goal 1: Enhance the existing sector strategy approach, driving career pathways and systemically addressing business needs.

- 1.1 – Continue to focus on sector specific services to businesses, including industry representatives and messaging.
- 1.2 – Work alongside training providers and employers to implement increased depth and diversity of earn and learn strategies such as apprenticeships, on the job training, and internships, beginning at the K-8 level.
- 1.3 – Partner with industry to build a multi-pronged pathway-focused regional talent strategy.
- 1.4 – Improve outreach to existing industry groups who can organically amplify CSCLM strategies and successes.

STRATEGIC PLAN GOALS

Goal 2: Leverage the strong service delivery structure to provide access to the comprehensive talent pool.

- 2.1 – Embrace and expand creative outreach strategies that take the CSCLM “front door” directly to “the customer’s door.”
- 2.2 – Drive the holistic integration of services needed to achieve a true shared one-stop system for customers.
- 2.3 – Use existing relationships to deploy strategies in preparation for the implementation of HB1507.
- 2.4 – Enhance customer focus through the transformation of service delivery by involving their voice.

Goal 3: Serve as convener for talent development in the region.

- 3.1 – Utilize existing asset mapping to enhance partnership efforts among stakeholders or become involved in existing partnership activities.
- 3.2 – Position CSCLM as the partner to have at the table.
- 3.3 – Expand partnerships with economic development organizations through the region.
- 3.4 – Play the role of relationship broker between partners, training providers, and industry.

Goal 4: Tell the talent development story of Citrus, Levy and Marion counties.

- 4.1 – Communicate agile services available in the workforce ecosystem in an evolving labor market to jobseekers and business partners by telling success stories.
- 4.2 – Embrace the role of subject matter experts on workforce development and labor market information in the community.
- 4.3 – Advocate for a dual customer focused system where both jobseekers and businesses are equally prioritized

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-

The labor market is a market like any other, with fluctuations in supply and demand, skills, and wages. In conversations and interviews, stakeholders shared the need for flexibility in the current environment. Employers are competing for a limited supply of labor; CSCLM has shown strength in meeting the needs of business and industry in this type of labor market with successful outreach to candidates. For example, the Youth Expo is building the pipeline early for both jobseekers and employers to connect sooner. Offering access to employers through specialized partnerships such as the Lockheed Martin Apprenticeship Lab is the type of individualized attention to customers and industry that creates results. Expansion in successful efforts along with opportunities for continuous improvement are within reach to better serve both employers and job-seekers.

Sector-based partnerships are already present in the region. However, there remains an opportunity for CSCLM to convene major industries to provide services and improve outcomes for employers. Business Development Coordinators trained on industry specific needs, credentials, and terminology will allow CSCLM to continue in its role as a true partner, adding value to the menu of services already provided to all employers.

CSCLM can build on the existing targeted in-demand industries in the region, which are projected to grow in the near-to-medium term. Manufacturing, Construction, transportation/Distribution, Information Technology, Healthcare, and Hospitality were all identified in-demand occupations in the region in 2020, and those industries are still anticipated to require some of the highest number of hires in 2022 and 2023.

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These 6 in-demand industries (Table 1) alone are projected to hire nearly 140,000 times in 2022 and 2023 alone, opportunity is available here and deeper integration between these industries and CSCLM can move the needle. As the economy comes out of the changes caused by COVID, CSCLM should continuously monitor demand across industries, so as to identify growth outside of the existing in-demand sectors and take action as needed.

Draft

Table 1. In-Demand Industry Sectors, 2022. Citrus, Levy and Marion Counties

Industry	2021 Avg. Wage	2021 Jobs	2026 Jobs	2021-2026 % Change	2021 % of Labor Force	2026 % of Labor Force	2022 Hires	2023 Hires
Accommodation and Food Services	\$23,537	14,744	18,807	27.6%	8.8%	10.3%	23,874	25,102
Health Care and Social Assistance	\$61,931	25,565	27,454	7.4%	15.3%	15.1%	14,285	14,499
Construction	\$51,723	15,012	15,998	6.6%	9.0%	8.8%	11,276	11,467
Transportation and Warehousing	\$48,327	6,717	8,132	21.1%	4.0%	4.5%	8,927	9,475
Manufacturing	\$61,201	11,144	12,532	12.5%	6.7%	6.9%	6,268	6,468
Professional, Scientific, and Technical Services	\$63,750	6,469	7,164	10.7%	3.9%	3.9%	3,415	3,504

Source: Emsi 2022.1

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-

CSCLM can work with industry to identify staffing pain points to pragmatically remove artificial barriers. For entry-level positions where on-the-job training can be sufficient, encourage industry to re-evaluate hiring requirements or implement skills-based assessments to assess the real ability of candidates that are relevant for job success.

Draft

In collaboration with employer partners, CSCLM should bring training providers and schools into the partnership to work towards a multipronged pathway-focused regional talent strategy. The goal is to remove barriers from high-paying, in-demand jobs with opportunities for advancement. An initial survey of a sector will identify common career pathways and job titles as well as the required qualifications and experience. Utilizing this data work with industry representatives to discern what is preventing entry level workers from entering or advancing in their pathway and promote to them skill-based hiring, removing artificial credential or degree barriers where appropriate.

Regional industry groups are powerful partners; they are already in contact with employers who are interested in collaborating with similar organizations. CSCLM must build these relationships by attending meetings or joining groups where possible. CSCLM can use these opportunities to speak on successes that similar employers or industries have had, share resources available to employers, and offer best practices. This serves both business development goals and also expands partnerships.

Goal 2: Leverage the strong service delivery structure to provide access to the comprehensive talent pool.

- 2.1 – Embrace and expand creative outreach strategies that take the CSCLM “front door” directly to “the customer’s door.”
 - 2.2 – Drive the holistic integration of services needed to achieve a true shared one-stop system for customers.
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-

Using the mobile front door strategy, CSCLM should allow customers to access services through a consistently wide range of outpost locations embedded in the community. In addition, CSCLM should embrace partnerships with organizations that already have a wide and mobile footprint, offering partner training to speak about CSCLM services. This leads to a source of regional service delivery through embedded partner staff members who take ownership for their role in the CSCLM ecosystem. By expanding the use of mobile units at events regularly scheduled by partner organizations, CSCLM can create mutually beneficial cross-organization intake opportunities. Furthermore, CSCLM can market to parents at head-start events, host non-traditional community gathering events like a Food Truck Palooza, STEM Camps, Career Exploration Camps, Speed Interviews, etc.

HB1507 requires intentional partnership among workforce stakeholders. Under the new regulation the workforce board’s role is to convene partners in the region. CSCLM will continue to build trust among partners to share information on services they are providing to clients, which with specific strategies can and should lead to coordinated efforts for service delivery. Building on the initial efforts for collaboration, CSCLM can move away from partner referrals caused by siloes to an integrated systematic approach. Customers should be able to have one case worker across supportive services, case notes available to partners, and a minimal number of appointments for pre-screening and eligibility.

Partners in the region have a favorable view of CSCLM and are interested in continuing to work together. With positive ties in the community combined with the drive to provide customers what they need, CSCLM can define what seamless service with no

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-

wrong doors among partners will look like.

Some aspects of integrated service delivery are well known and widely implemented best practices. However, there will be circumstances where unique situations or customers need extra attention. CSCLM will implement a human centered design when counseling customers and center their needs at the basis of any decision-making. Additionally, services that provide a strong value-add such as English literacy, financial literacy, and digital literacy must be offered across the board.

Goal 3: Serve as convener for talent development in the region.

- 3.1 – Utilize existing asset mapping to enhance partnership efforts among stakeholders or become involved in existing partnership activities.
 - 3.2 – Position CSCLM as the partner to have at the table.
 - 3.3 – Expand partnerships with economic development organizations through the region.
 - 3.4 – Play the role of relationship broker between partners, training providers, and industry.
-

Partnership was a recurring theme in the strategic planning process. Discussions in focus groups and staff meetings were centered around changes to state law mandating accountability and seamless service delivery. There was consensus that partnership among organizations was needed, but in three counties with disparate levels of government, community partners, and employers/industries, gathering stakeholders at a single meeting and walking away with concrete next steps to create a more cohesive workforce ecosystem is easier said than done. Additionally, existing partnerships are not well communicated outside of those involved and capacity for staff to attend meetings or champion initiatives is always limited.

CSCLM is the common thread in discussions involving workforce, and is uniquely positioned to participate in existing stakeholder convenings and partnerships and developing new opportunities. CSCLM can convene partners where current efforts are lacking – particularly rural areas – and identify where existing partnering opportunities exist to avoid recreating the wheel. Available asset mapping efforts can provide a starting point to ensure CSCLM is aware of all convenings that it should be a part of. In conversations with partners and industry, staff should identify areas lacking partnership and report back to leadership.

By working to have a seat at every relevant table and building the table where there is not one yet, CSCLM is both serving the organization’s mission and integrating the requirements outlined in HB1507. Additional resources or staffing may be required to convene partners and facilitate the agenda. Buy-in from CSCLM leadership will be essential to empower the organization to build strong and mutually beneficial relationships.

Goal 4: Tell the talent development story of Citrus, Levy, and Marion counties.

- 4.1 – Communicate agile services available in the workforce ecosystem in an evolving labor market to jobseekers and business partners by telling success stories.
 - 4.2 – Embrace the role of subject matter experts on workforce development and labor market information in the community.
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-

CSCLM is known among the public, however, continuous improvement in messaging and outreach will be necessary to better serve its customers. Beginning in 2020 with major job losses, the narrative that job centers were the unemployment office was widespread. The flexibility demonstrated by center staff in pivoting to assist with unemployment insurance claims is to be lauded for the triage-like efforts to process an unheard-of number of claims. Now that the world has moved past the stage of mass-unemployment, customers must be re-introduced to the range of services that CSCLM offers. Those customers include job-seekers, but also employers that are offered business services and partners that can rely on CSCLM for up to date labor market information and thought leadership.

Expand efforts for multi-channel marketing to share stories that resonate with each line of customer that CSCLM serves. In this instance, one tool is individualized messaging that conveys how CSCLM can serve as a recruiter to the job-seekers, a headhunter to employers, and as a subject matter expert to the community partners. CSCLM can tell this talent development story using targeted outreach such as ads in social media, business journals, and at community events.

CSCLM is also able to build on successful efforts like the Youth Expo, by increasing embedded K-12 programming through expanded public-school partnerships. Using these established relationships to incorporate career pathway programming for in-demand jobs into curriculum, backed by labor market information and industry validation, can bring more exposure to students not just on what a job entails, but also on what a career looks like several years into the workforce. CSCLM can work with partners to develop a curriculum that will serve to connect students to high-wage positions directly out of school to entice students who may not otherwise consider

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-

these paths.

This messaging applies to industry as well. With “Now Hiring” signs attracting few applicants, employers are primed to make the changes that increase job quality. CLM will focus on employers that are willing to raise their wages, or that have/are willing to create pathways for advancement opportunities. CLM will also continue to work with partners to define credentials needed to advance with an employer and communicate those to job-seeking customers.

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CareerSource Citrus Levy Marion's Mission

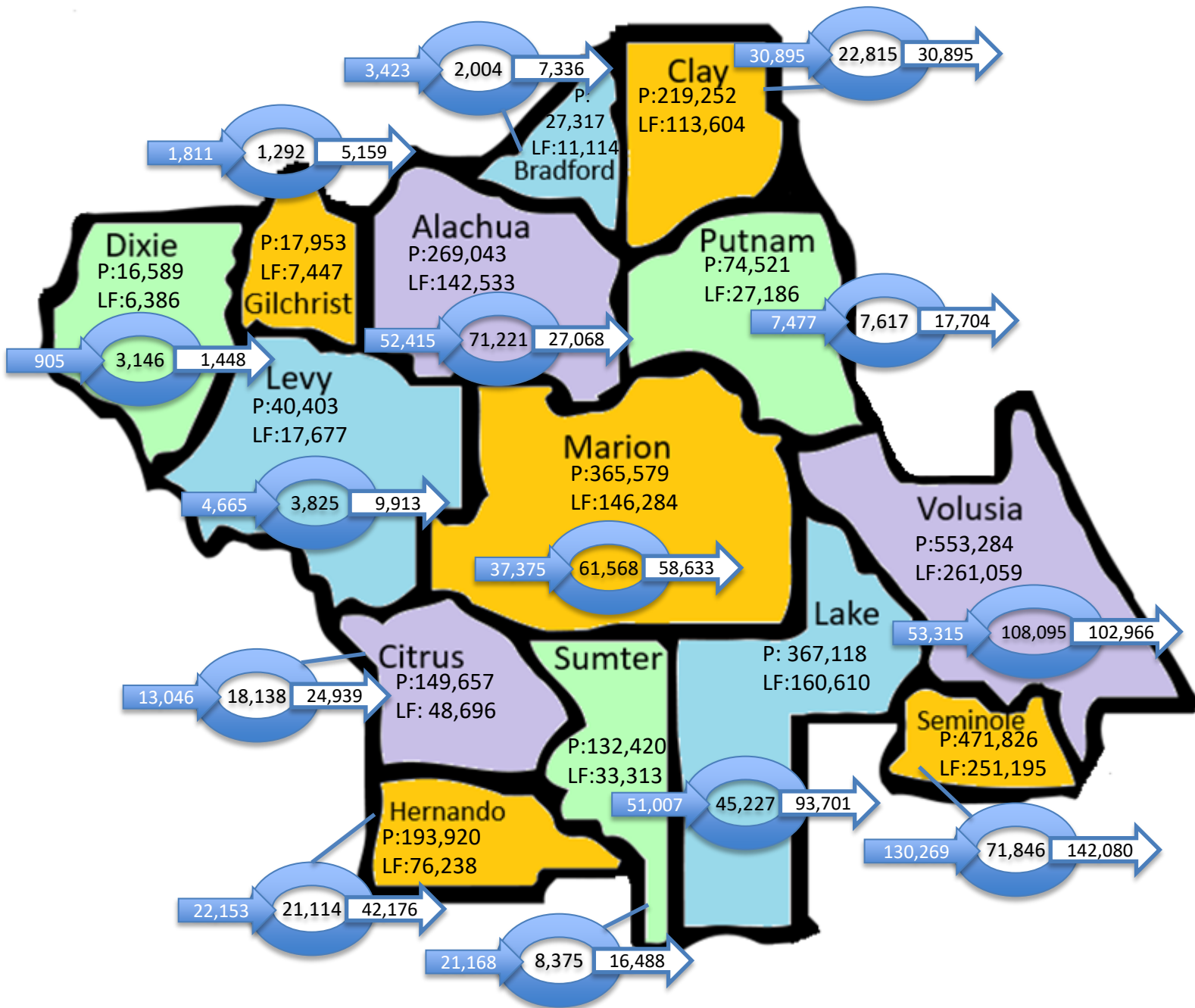
CareerSource Citrus Levy Marion brings together residents, businesses, educational and community partners to develop services to support high-quality education, training, supportive and employment services to meet regional workforce needs.

CareerSource Citrus Levy Marion's Vision

To be known as the number one workforce resource in the state of Florida by providing constructive tools and professional supportive services that are reflected in the quality of our job candidates and meet the needs of the business community.




WORKFORCE INFLOW/OUTFLOW PATTERNS





Key/Source

P: Population – Census American Community Survey 1-Year Estimates

LF: Labor Force – Local Area Unemployment Statistics December 2021 (not seasonally adjusted)

 Inflow: Employed in the county but living outside (Census on the map, 2019)

 Outflow: Living in the county, but employed outside (Census on the map, 2019)

 Employed and living in the county (Census on the map, 2019)

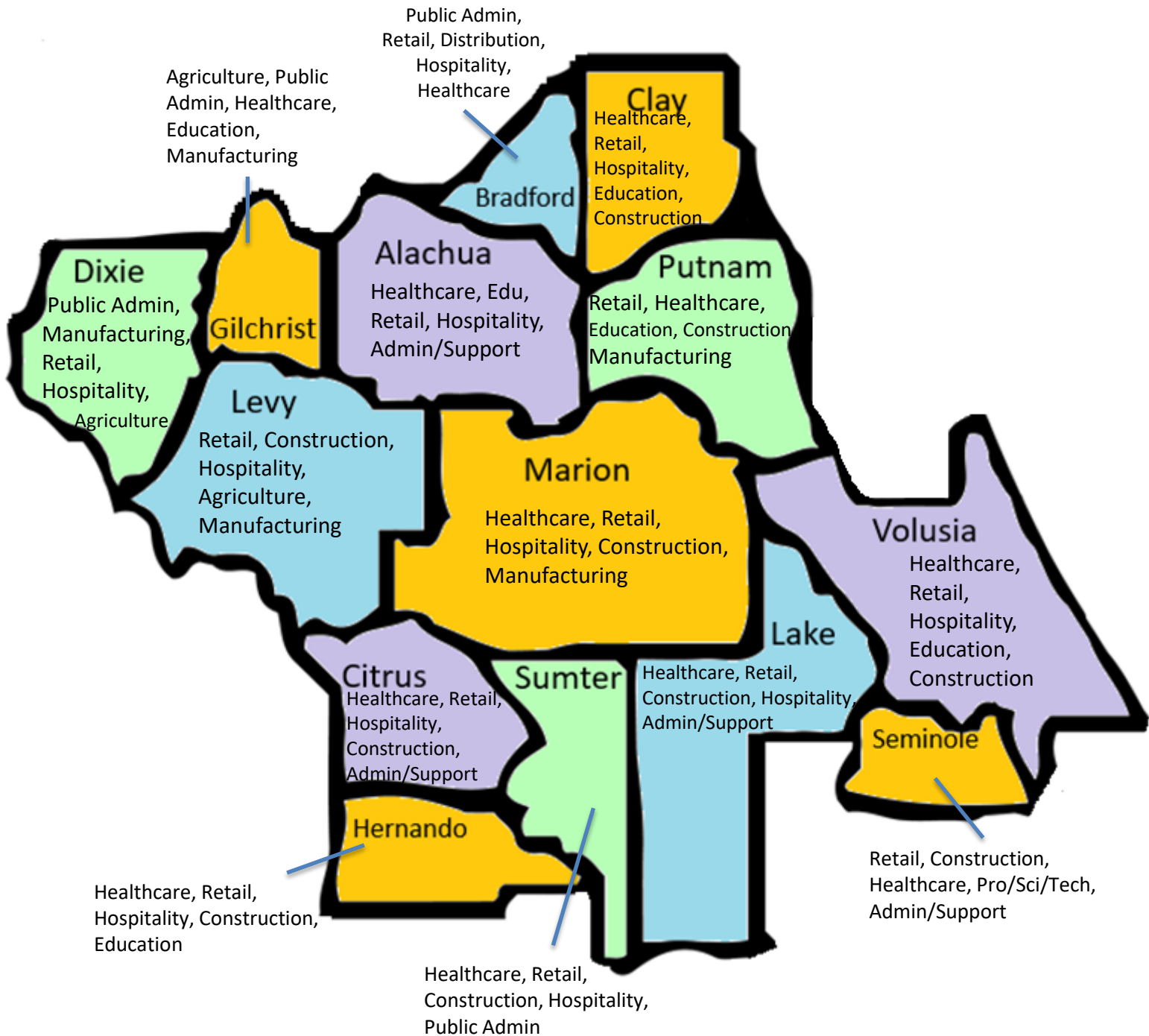
WORKFORCE INFLOW/OUTFLOW PATTERNS

	Top 5 Inflow		Top 5 Outflow	
Alachua	Marion	5,441	Duval	3,919
	Duval	4,032	Marion	2,258
	Columbia	3,831	Orange	2,230
	Levy	3,500	Hillsborough	1,807
	Clay	2,439	Leon	1,117
Bradford	Clay	738	Alachua	2,051
	Alachua	358	Duval	1,453
	Duval	292	Clay	792
	Union	238	Orange	261
	Putnam	213	Union	251
Citrus	Marion	2,150	Marion	4,268
	Hernando	1,739	Hernando	2,315
	Pasco	917	Orange	2,119
	Hillsborough	816	Hillsborough	2,076
	Pinellas	720	Lake	1,707
Clay	Duval	14,798	Duval	39,621
	St. Johns	3,076	St. Johns	2,920
	Putnam	1,239	Orange	2,626
	Alachua	820	Alachua	2,439
	Nassau	806	Hillsborough	1,740
Dixie	Levy	165	Alachua	557
	Gilchrist	126	Levy	359
	Alachua	64	Gilchrist	258
	Columbia	53	Duval	197
	Taylor	51	Columbia	191
Gilchrist	Levy	461	Alachua	2,201
	Alachua	295	Levy	439
	Dixie	258	Columbia	304
	Columbia	134	Marion	255
	Suwannee	109	Duval	234
Hernando	Pasco	6,101	Pasco	10,349
	Hillsborough	2,436	Hillsborough	8,961
	Citrus	2,315	Pinellas	4,887
	Pinellas	1,581	Orange	2,829
	Polk	1,128	Citrus	1,739

	Top 5 Inflow		Top 5 Outflow	
Lake	Orange	10,085	Orange	43,344
	Marion	6,276	Seminole	8,087
	Sumter	3,710	Sumter	5,033
	Volusia	3,695	Hillsborough	4,513
	Polk	3,409	Volusia	3,496
Levy	Marion	758	Alachua	3,500
	Alachua	709	Marion	1,340
	Gilchrist	439	Duval	522
	Citrus	390	Gilchrist	461
	Dixie	359	Citrus	444
Marion	Citrus	4,268	Orange	7,006
	Lake	3,209	Sumter	6,325
	Orange	2,336	Lake	6,276
	Alachua	2,258	Alachua	5,441
	Duval	2,140	Hillsborough	4,477
Putnam	St. Johns	1,194	St. Johns	2,466
	Clay	1,057	Duval	2,465
	Duval	774	Volusia	2,147
	Alachua	471	Alachua	1,305
	Flagler	452	Orange	1,295
Seminole	Orange	47,489	Orange	92,818
	Volusia	23,260	Volusia	6,239
	Lake	8,087	Hillsborough	6,233
	Osceola	6,126	Duval	3,425
	Hillsborough	5,075	Brevard	2,986
Sumter	Marion	6,325	Lake	3,710
	Lake	5,033	Marion	1,665
	Citrus	1,389	Orange	1,451
	Orange	954	Hillsborough	1,395
	Hernando	891	Pasco	821
Volusia	Orange	6,820	Orange	28,918
	Flagler	6,726	Seminole	23,260
	Seminole	6,239	Duval	6,398
	Lake	3,496	Hillsborough	4,712
	Duval	3,474	Brevard	4,072



TOP SECTORS BY COUNTY



Key/Source

Healthcare = Healthcare and Social Assistance (NAICS 62)

Hospitality = Accommodation and Food Services (NAICS 72)

Admin/Support = Administrative and Support and Waste Mgmt and Remediation Services (NAICS 56)

Public Admin = Public Administration (NAICS 92)

Pro/Sci/Tech = Professional, Scientific, and Technical Services (NAICS 54)

NAICS = North American Industry Classification System

	Top 5 Sectors/Empl		RWB Targeted Sectors
Alachua	Healthcare	30,108	Logistics/Advanced Mfg
	Education	24,266	Construction
	Retail	14,090	Healthcare
	Hospitality	12,102	Technology
	Admin/Support	8,384	Hospitality
Bradford	Public Administ.	1,763	Logistics/Advanced Mfg
	Retail	1,070	Construction
	Distribution	845	Healthcare
	Hospitality	749	Technology
	Healthcare	559	Hospitality
Citrus	Healthcare	7,403	Mfg/Transport/Distribution
	Retail	5,990	Professional/IT
	Hospitality	3,953	Healthcare
	Construction	3,507	Hospitality
	Admin/Support	2,468	Construction
Clay	Healthcare	10,077	Finance
	Retail	8,847	IT
	Hospitality	6,455	Distribution
	Education	5,391	Logistics
	Construction	5,061	Healthcare
Dixie	Public Administ.	656	
	Manufacturing	518	
	Retail	324	
	Hospitality	262	
	Agriculture	225	
Gilchrist	Agriculture	708	
	Public Administ.	650	
	Healthcare	421	
	Education	405	
	Manufacturing	369	
Hernando	Healthcare	9,778	Healthcare
	Retail	8,445	Construction
	Hospitality	5,429	Mfg/Transport/Warehouse
	Construction	3,974	Retail
	Education	2,959	Finance/IT

	Top 5 Sectors/Empl		RWB Targeted Sectors
Lake	Healthcare	19,842	Manufacturing
	Retail	17,786	Finance
	Construction	12,144	Logistics/Distribution
	Hospitality	11,789	Professional
	Admin/Support	7,361	Healthcare
Levy	Retail	1,540	Mfg/Transport/Distribution
	Construction	1,443	Information Technology
	Hospitality	1,021	Healthcare
	Agriculture	975	Hospitality
	Manufacturing	897	Construction
Marion	Healthcare	17,895	Mfg/Transport/Distribution
	Retail	17,530	Information Technology
	Hospitality	10,197	Healthcare
	Construction	10,052	Hospitality
	Manufacturing	9,948	Construction
Putnam	Retail	2,761	Finance
	Healthcare	2,476	IT
	Education	1,980	Distribution
	Construction	1,675	Logistics
	Manufacturing	1,645	Healthcare
Seminole	Retail	28,253	Manufacturing
	Construction	23,592	Finance
	Healthcare	22,855	Logistics/Distribution
	Pro/Sci/Tech	20,050	Professional
	Admin/Support	19,813	Healthcare
Sumter	Healthcare	6,490	Manufacturing
	Retail	5,231	Finance
	Construction	4,093	Logistics/Distribution
	Hospitality	3,639	Professional
	Public Admin	3,438	Healthcare
Volusia	Healthcare	31,615	Healthcare
	Retail	28,009	Construction
	Hospitality	22,111	Mfg/Logistics/Distribution
	Education	15,145	Professional/IT
	Construction	14,565	Retail/Hospitality

PY2021 Q2	Statewide	LWDB 01	LWDB 02	LWDB 03	LWDB 04	LWDB 05	LWDB 06	LWDB 07	LWDB 08	LWDB 09	LWDB 10	LWDB 11	LWDB 12	LWDB 13	LWDB 14	LWDB 15	LWDB 16	LWDB 17	LWDB 18	LWDB 19	LWDB 20	LWDB 21	LWDB 22	LWDB 23	LWDB 24
Adults:																									
Employed 2nd Qtr After Exit	83.1	90.3	98.5	81.0	98.0	79.1	88.2	100.0	98.3	83.3	92.3	90.7	81.9	90.9	93.5	74.8	94.3	86.3	92.5	90.7	93.8	59.4	92.2	49.0	82.5
Median Wage 2nd Quarter After Exit	\$8,881	\$10,259	\$8,342	\$9,204	\$11,307	\$8,980	\$8,887	\$11,429	\$12,675	\$10,237	\$9,024	\$7,889	\$7,800	\$9,101	\$10,683	\$10,066	\$9,771	\$7,802	\$10,915	\$8,817	\$12,483	\$6,596	\$8,881	\$5,860	\$7,647
Employed 4th Qtr After Exit	81.7	92.6	96.7	90.5	93.6	81.0	84.4	100.0	97.0	75.0	86.8	86.9	82.2	87.6	93.2	76.8	87.2	83.1	83.2	89.4	92.2	53.4	87.8	53.3	82.9
Credential Attainment Rate	79.9	91.9	95.0	88.9	97.4	98.1	86.6	90.9	93.8	74.0	83.1	74.1	76.9	86.3	87.7	74.8	92.5	75.7	68.7	97.4	94.6	74.4	84.4	21.6	76.3
Measurable Skill Gains	72.2	34.3	54.2	82.2	53.3	33.8	89.3	88.2	90.5	57.1	52.8	79.3	73.8	66.1	63.0	71.1	66.7	62.5	62.9	73.1	84.2	85.2	74.7	71.6	59.6
Dislocated Workers:																									
Employed 2nd Qtr After Exit	84.8	85.7	100.0	0.0	66.7	100.0	71.4	100.0	86.7	75.0	50.0	85.7	88.5	88.2	89.7	82.7	78.1	80.0	76.2	100.0	84.6	69.5	93.2	60.0	85.7
Median Wage 2nd Quarter After Exit	\$10,373	\$4,901	\$7,906	\$0	\$12,322	\$10,926	\$11,685	\$9,969	\$10,722	\$6,414	\$5,401	\$8,422	\$8,248	\$12,145	\$11,350	\$12,969	\$10,367	\$8,429	\$10,289	\$1,587	\$8,936	\$10,712	\$12,016	\$2,146	\$8,474
Employed 4th Qtr After Exit	81.9	85.7	100.0	0.0	83.3	100.0	85.7	0.0	92.3	33.3	80.0	63.6	78.8	87.9	86.0	84.8	87.8	66.7	83.3	66.7	84.2	62.3	86.1	66.7	91.7
Credential Attainment Rate	85.0	83.3	100.0	0.0	100.0	0.0	66.7	0.0	92.3	77.8	100.0	100.0	88.3	74.3	93.7	84.4	95.1	62.5	30.8	100.0	100.0	81.3	85.5	100.0	90.9
Measurable Skill Gains	70.7	31.3	80.0	71.4	100.0	0.0	100.0	50.0	88.2	83.3	80.0	80.5	76.0	77.8	62.7	68.1	50.0	67.1	55.8	88.9	78.3	88.5	77.7	67.4	70.4
Youth:																									
Employed 2nd Qtr After Exit	81.2	74.5	83.3	83.8	100.0	63.1	75.3	86.1	83.5	81.3	81.0	89.7	78.5	81.2	90.1	70.0	78.7	68.6	95.0	93.3	87.8	74.3	83.7	83.3	84.4
Median Wage 2nd Quarter After Exit	\$4,114	\$4,465	\$5,207	\$4,239	\$3,993	\$3,868	\$3,595	\$3,817	\$4,288	\$5,200	\$3,585	\$3,094	\$4,688	\$3,988	\$4,615	\$5,433	\$3,472	\$3,215	\$3,900	\$4,240	\$3,273	\$3,295	\$4,103	\$5,312	\$4,624
Employed 4th Qtr After Exit	78.4	75.6	77.8	83.3	100.0	72.4	78.9	85.1	82.7	75.6	75.4	86.4	75.3	83.6	88.4	66.5	68.2	70.8	85.2	85.3	83.8	70.5	74.2	73.3	86.4
Credential Attainment Rate	85.0	71.4	85.7	65.1	63.6	81.5	69.6	58.7	94.0	92.1	98.2	99.1	93.6	78.4	78.6	52.6	99.2	88.0	83.3	100.0	100.0	86.4	84.4	28.6	73.8
Measurable Skill Gains	54.3	71.1	66.7	47.6	34.6	10.8	74.6	73.5	83.6	7.8	92.7	79.8	67.3	54.1	55.6	27.2	86.4	68.2	50.0	86.2	87.5	65.2	50.8	38.9	61.9
Wagner Peyser:																									
Employed 2nd Qtr After Exit	58.8	64.9	65.8	64.8	62.3	62.7	64.9	59.0	62.1	66.1	65.1	58.2	59.5	60.3	55.4	61.7	51.1	60.7	58.8	61.9	59.4	57.1	59.5	55.9	66.0
Median Wage 2nd Quarter After Exit	\$6,006	\$6,931	\$7,309	\$4,765	\$5,962	\$4,856	\$4,954	\$4,486	\$6,883	\$6,247	\$5,492	\$5,820	\$6,021	\$5,743	\$6,179	\$6,498	\$6,322	\$5,343	\$6,236	\$5,474	\$6,476	\$6,314	\$7,115	\$5,754	\$6,183
Employed 4th Qtr After Exit	59.9	63.0	63.8	64.2	64.8	63.6	61.4	63.3	65.1	65.9	63.5	61.9	60.5	60.9	57.6	64.6	55.6	64.8	59.3	61.9	59.8	56.6	58.1	54.9	64.8

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

Cost Saving Collaborations

- Partnership with LWDB 6:
 - o CLM and North Florida (NF) have been in a finance and HR partnership for over 5 years. CLM serves as the financial administrator for NF and the PEO. NF contracts with CLM on financial services for \$50,000. This saves NF approximately \$50,000 in administrative costs.
 - o CLM serves as the PEO for NF. When started NF was paying approximately \$800 per staff member per month for health insurance. The partnership resulted in NF healthcare costs being reduced to \$400 per month per staff, or approximately \$86,000 per year.
 - o Because of the financial services, both boards join to select an audit firm, and this results in an additional savings in staff time and money.
- Partnership with Mid-FL Regional Manufacturers Association (MRMA):
 - o MRMA is a single staff organization. As such, benefit costs were prohibitive. In a similar arrangement to LWDB 6, CLM serves as the PEO, enabling MRMA to recruit and retain a top executive with competitive pay and benefits.
- Partnership with Nature Coast Business Development Council (NCBDC): CLM serves in the same capacity as it does with MRMA.
- Partnership with local Community Action Agency:
 - o CLM has made space available in our center for the Community Action Agency staff to collocate, allowing CAA to have a more affordable space in which to meet customers.
 - o Many of these customers also use CLM services and are now able to obtain multiple services in one office.
- Cross regional collaboration on staff trainings to minimize costs: Welfare Transition, TAD Grants business services training, and Business U business services training.
-

Service efficiency Collaborations

- Economic Development as business outreach: CLM contracts with its three economic development partners- Ocala/Marion CEP; Citrus Chamber and NCBDC to serve as part of its business services/outreach team. This allows coordination of the economic and workforce services provided to existing businesses and business recruitment efforts. A current example of other collaborations is a current Labor Force Retention survey that CLM is doing with the CEP.
- Collaboration with LWDB 9 (Gainesville)
 - o Various staff serve as SME to assist as requested
 - o Joint Ag Job Fair
 - o Collaboration on training

- Job development/business services
 - Jointly support marine manufacturing business meeting with our partners and area marine businesses to improve training and support industry-related economic development
 - Collaboration with MRMA, LWDB12 and College of Central Florida to support MRMA members from Sumter County
 - Co-location of Talent Center on the campus of College of Central Florida in Ocala to provide college placement and employment prep for all CF students as well as all educational partners in the region.

Recruitment Collaborations

- Hiring Event Coordination with Region 9 to hold an Agriculture Hiring Event simultaneously in person and virtual in our respective regions. Each region held an in-person event with businesses. We also had laptops available for job seekers to view the opportunities in the other region eliminating the need for travel.
- Levy-Gilchrist Career Fair was coordinated between Region10 and Region 7 and held at CF in Chiefland. Businesses from Levy and Gilchrist County were on hand to meet with job seekers. Business ranged from manufacturing, finance, agriculture, and public service



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, March 9, 2022
Executive Committee, Wednesday, March 2, 2022
Career Center Committee, Thursday, February 17, 2022

TOPIC/ISSUE:

Career Development Coach

BACKGROUND:

In a recent meeting with our Welfare Transition (WT) and Supplemental Nutritional Assistance Program (SNAP) team, they identified the need to increase efforts on placement and retention.

HB1507 directly attaches performance within the WT program to each LWDB's 'letter grade'. We feel we need to be proactive in bolstering staffing that will support positive outcomes of the program.

We are seeking approval to hire one full time Career Development Coach who will work with existing case managers and WT participants to increase focus on Employability Skills, Soft Skills and Work preparation with the WT and SNAP population to support them in job attainment and retention.

POINTS OF CONSIDERATION:

Addition of this position is contingent on sustained funding of the current SNAP program. At this time, we have experienced funding reduction and have moved SNAP costs to WT funding. The position will only be added once budgets are confirmed and appropriate funding is made available.

STAFF RECOMMENDATIONS:

Approve addition of a Career Development Coach to the WT/SNAP team upon funding availability.

COMMITTEE ACTION:

Career Center - Jorge Martinez made a motion to approve the Career Coach position contingent on funding. Christie McElroy seconded the motion. Motion carried.

Executive - Ted Knight made a motion to approve the Career Coach position contingent on funding. Brandon Whiteman seconded the motion. Motion carried.

BOARD ACTION:



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, March 9, 2022
Executive Committee, Wednesday, March 2, 2022
Career Center Committee, Thursday, February 17, 2022

TOPIC/ISSUE:

Re-entry Navigator position

BACKGROUND:

We have recently received funding from the DEO to add a Re-entry Navigator position. This position would be tasked with working with creating and maintaining linkages between correctional institutions and the workforce community, engage community partners to service returning citizens and build additional capacity within the workforce system to better serve justice-involved citizens.

POINTS OF CONSIDERATION:

Funding in the amount of \$175,000 was received to cover a two program year period.

STAFF RECOMMENDATIONS:

Approve the addition of a Re-entry Navigator position

COMMITTEE ACTION:

Career Center - Jorge Martinez made a motion to approve the funding allocation for the position and move staff costs to the new funding source. Judy Houlios seconded the motion. Motion carried.

Executive - Ted Knight made a motion to approve the funding allocation for the position and move staff costs to the new funding source. Charles Harris seconded the motion. Motion carried.

BOARD ACTION:



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, March 9, 2022
Executive Committee, Wednesday, March 2, 2022
Career Center Committee, Thursday, February 17, 2022

TOPIC/ISSUE:

Staffing Firm Collaboration Meeting

BACKGROUND:

In the past we have had co-location agreements with staffing firms within our career centers. We feel that re-engagement of the staffing industry in our centers will be beneficial not only for us, but to the staffing firm(s) that are selected to co-locate. This approach with jointly drive additional foot traffic into our offices.

POINTS OF CONSIDERATION:

At this time, we feel that a meeting with representatives from the staffing industry will better equip us to develop a competitive Request for Proposals (RFP) that will be used to select a firm or firms should we move forward after the collaboration meeting.

STAFF RECOMMENDATIONS:

Approve the release of an announcement/invitation for a collaboration meeting to determine the best approach to an RFP.

COMMITTEE ACTION:

Career Center - Jorge Martinez made a motion to approve outreach efforts to staffing firms. Lanny Mathis seconded the motion. Motion carried.

Executive - Ted Knight made a motion to approve outreach efforts to staffing firms. Charles Harris seconded the motion. Motion carried.

BOARD ACTION:



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, March 9, 2022 Executive Committee, Wednesday, March 2, 2022

TOPIC/ISSUE:

Level I Background Checks Request for Quote (RFQ)

BACKGROUND:

It is our current procedure to conduct a Level I background check on individuals enrolled in our Paid Work Experience (PWE) and Paid Internship (PI) programs. Ballard Investigations, the company we previously used to conduct background checks, dissolved in 2021 and is no longer in operation. It was determined that we should re-procure a service to provide this service to those enrolling in Experiential Learning.

POINTS OF CONSIDERATION:

- Certain criminal convictions might prohibit a candidate from entering into a work-based learning agreement with an employer.
- A Level I Background check will offer a screening tool to help ensure candidates are placed in the appropriate training position.

STAFF RECOMMENDATIONS:

Approve the release of an RFQ to solicit quotes from companies that offer Level I background checks to support the PWE and PI programs.

COMMITTEE ACTION:

Fred Morgan made a motion to approve the release of the RFQ to receive quotes for background check services. Brandon Whiteman seconded the motion. Motion carried.

BOARD ACTION:



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, March 9, 2022 Executive Committee, Wednesday, March 2, 2022

TOPIC/ISSUE:

Training Provider renewal for Interstate Commercial Driving School (ICDS)

BACKGROUND:

ICDS has submitted a renewal application for continued provider eligibility for one program they wish to add to our Area Targeted Occupation List (ATOL). The program is:

- Commercial Motor Vehicle Class A Driving Program

POINTS OF CONSIDERATION:

Pursuant to local policy *OPS-28 Area Targeted Occupation List and Training Provider Selection* the approval of providers and programs will be based on several sets of criteria – primarily: All programs must operate a minimum of 12 months, must maintain acceptable performance thresholds for outcomes based on enrollments, completions and employment after training and must meet reporting requirements to the Florida Educational and Training Placement Information Program (FETPIP). This provider is licensed with the State of Florida and has reported a 97% completion rate with a 62% placement performance with an average wage of \$60,000 per year. Provider has a history of good performance prior to the pandemic and trains in a high demand occupation.

STAFF RECOMMENDATIONS:

Approve renewal of Interstate Commercial Driving School as a training provider for CMV Class A Driving Program contingent upon a probationary review at 12 months.

COMMITTEE ACTION:

Fred Morgan made a motion to approve the renewal of ICDS as a training provided contingent upon a probationary review in 12 months. Ted Knight seconded the motion. Motion carried.

BOARD ACTION:



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, March 9, 2022 Executive Committee, Wednesday, March 2, 2022

TOPIC/ISSUE:

Training Provider renewal for National Training

BACKGROUND:

National Training has submitted a renewal application for continued provider eligibility for one program they wish to add to our Area Targeted Occupation List (ATOL). The program is:

- CDL NOW

POINTS OF CONSIDERATION:

Pursuant to local policy *OPS-28 Area Targeted Occupation List and Training Provider Selection* the approval of providers and programs will be based on several sets of criteria – primarily: All programs must operate a minimum of 12 months, must maintain acceptable performance thresholds for outcomes based on enrollments, completions and employment after training and must meet reporting requirements to the Florida Educational and Training Placement Information Program (FETPIP). The CDL NOW meets CareerSource performance measures based on reported numbers.

STAFF RECOMMENDATIONS:

Approve renewal of National Training as a training provider for CDL NOW.

COMMITTEE ACTION:

Charles Harris made a motion to approve National Training as a training provider. Fred Morgan seconded the motion. Motion carried.

BOARD ACTION:



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, March 9, 2022 Executive Committee, Wednesday, March 2, 2022

TOPIC/ISSUE:

Agile Workforce Staffing Plan

BACKGROUND:

We are looking at ways to increase cross-program participation among our customer base while maximizing performance as we begin to see plans forming in response to HB1507. HB1507 describes a 'no wrong door' method of access for individuals seeking services. This approach requires a staffing pattern that is highly adaptable within all of our various funding streams and services. The attached Agile Workforce Staffing Plan addresses these needs by encouraging additional professional development within our own staff.

POINTS OF CONSIDERATION:

The Agile Workforce Staffing Plan will allow for increased services and a more holistic approach to serving our customers.

STAFF RECOMMENDATIONS:

Approve moving forward with implementation of the Agile Workforce Staffing Plan

COMMITTEE ACTION:

Brandon Whiteman made a motion to approve the staffing plan. Fred Morgan seconded the motion. Motion carried.

BOARD ACTION: