



## BOARD MEETING AGENDA

Tuesday, June 7, 2022 – 11:30 a.m.

College of Central Florida – Marion Campus – Webber Center  
3001 SW College Road, Ocala, FL 34474

Join Zoom Meeting: <https://us02web.zoom.us/j/84334468877>  
Conference Line: 1 646 558 8656 Meeting ID: 843 3446 8877

Call to Order		K. Baxley
Invocation and Pledge of Allegiance		R. Stermer
Roll Call		C. Schnettler
Public Comment		K. Baxley
Approval of Minutes, March 9, 2022	Pages 4 - 14	K. Baxley
Introduction of New Members		K. Baxley

### **APPROVAL OF CONTRACTS 2022-2023**

#### **Master Contracts Requiring 2/3rds Vote**

1. Citrus County Chamber of Commerce
2. Levy County Schools
3. College of Central Florida

Pages 15 - 16

K. Baxley /  
R. Skinner

#### **Master Contracts Requiring 2/3rds Vote - OJT, CBT, or Apprenticeship Training Opportunities**

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

#### **Contracts Not Requiring 2/3rds Vote**

9. Marion County School Board
10. Ocala Metro Chamber and Economic Partnership
11. Eckerd Connects
12. Thomas P. Miller and Associates
13. Underwood and Sloan
14. Powell and Jones – Joint Auditing
15. Powell and Jones – Subrecipient Monitoring
16. CD Staffing
17. Region 6 Financial Services Agreement

### **LUNCH**

#### **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.*



## **DISCUSSION ITEMS**

State Update	Pages 17 - 23	R. Skinner
Monitoring Report	Pages 24 - 25	R. Skinner
Letter Grades	Pages 26 - 48	R. Skinner
Workforce Issues that are Important to our Community		R. Skinner
Financial Disclosure Forms / Annual Conflicts Reminder		R. Skinner

## **ACTION ITEMS**

Strategic Plan	Pages 49 - 69	D. French
Schedule of Operations	Pages 70 - 72	D. French
2022/2023 Budget	Pages 73 - 74	D. French
Targeted Occupation List	Pages 75 - 77	L. Trowbridge

## **CONSENT AGENDA**

<u>Nominating Committee – 5/4/2022</u>	Pages 78 - 80	K. Baxley
Affirmation of Chair		
Nomination of Vice Chair		
Nomination of Treasurer		

<u>CEO Contract Review – 5-11-2022</u>	Pages 81 - 85	K. Baxley
CEO Contract Renewal		

<u>Performance and Monitoring – 5/10/2022</u>	Pages 86 - 87	C. Galica
DOE 2021 Monitoring Report		
Subrecipient Monitor		

<u>Business and Economic Development – 5/12/2022</u>		P. Beasley
No Action Items		

<u>Career Center – 5/19/2022</u>	Pages 88 - 90	L. Trowbridge
Learning Alliance Apprenticeship		
Background Check Contractor		
Job Search Readiness OPS-07		
		A. Jones

<u>Marketing and Outreach – 5/25/2022</u>		
No Action Items		

<u>Executive Committee – 5/16/2022, 6/1/2022</u>	Pages 91 - 96	K. Baxley /
2022-2023 Annual Benefits Renewal		R. Skinner
Administrative Plan		
Youth Build Grant Award		
2022/2023 Budget		
Staff Increases		

## **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.*



### **PROJECT UPDATES**

None

### **MATTERS FROM THE FLOOR**

### **ADJOURNMENT**

### **OUR VISION STATEMENT**

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



## **CAREERSOURCE CITRUS LEVY MARION BOARD MEETING**

### **MINUTES**

DATE: March 9, 2022  
PLACE: College of Central Florida, Lecanto Campus  
TIME: 11:30 a.m.

#### **MEMBERS PRESENT**

Albert Jones  
Arno Proctor  
Brandon Whiteman  
Carl Flanagan  
Charles Harris  
Christie McElroy  
Darlene Goddard  
Debra Stanley  
Fred Morgan  
Jeff Chang  
John Murphy  
Jorge Martinez  
Judy Houlios  
Kathy Judkins  
Kevin Cunningham  
Lanny Mathis  
Mark Paugh  
Pat Reddish  
Pete Beasley  
Ted Knight  
Theresa Flick

#### **MEMBERS ABSENT**

Angie White  
Equilla Wheeler  
John Hemken  
Kimberly Baxley  
Lewrissa Mainwaring  
Tiffany Wiggins

#### **OTHER ATTENDEES**

Rusty Skinner, CSCLM  
Dale French, CSCLM  
Cory Weaver, CSCLM  
Larry Trowbridge, CSCLM  
Cathy Galica, CSCLM  
Iris Pozo, CSCLM  
Laura Byrnes, CSCLM  
Zachary Johns, CSCLM

Cira Schnettler, CSCLM  
Robert Stermer, Attorney  
Charles Williams, DEO  
Daniel Harper, DEO  
Richard Powell, Powell, Jones, and Assoc  
Nithya Pramekumar, TPMA  
Patrick Gillen, TPMA  
Joyce Wilson, NCBDC

#### **CALL TO ORDER**

The meeting was called to order by Brandon Whiteman, Vice-Chair, at 11:32 a.m.



## **ROLL CALL**

Cira Schnettler called roll and a quorum was declared present.

## **PUBLIC COMMENT**

There were no public comments.

## **APPROVAL OF MINUTES**

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

## **LUNCH / PRESENTATIONS**

### **DEO Annual Performance Review**

Charles Williams and Daniel Harper reviewed the annual performance report for the 2020-2021 program year. CLM did not meet one goal in the dislocated worker category. They explained that due to a limited number of participants in the program, meeting the goal successfully would be difficult. CLM has a history of successful performance, therefore in this instance there will be no sanctions. There were four findings in the programmatic monitoring review.

Performance goals are being negotiated for the 2022-2023 program year.

They congratulated CLM on a successful year.

### **Audit Report**

Richard Powell thoroughly reviewed the report. He was happy to state that there were no findings. He explained that CLM stayed within budget and increased reserves. Rusty Skinner thanked the hard work of Susan Heller and the accounting team.

Al Jones made a motion to approve the final auditing report. Carl Flanagan seconded the motion. Motion carried.

### **Strategic Plan Presentation**

Nithya Pramekumar and Patrick Gillen reviewed the strategic plan as well as the updates to the mission and vision statements. Charles Harris inquired to adding safeguards within the plan that would allow continued delivery of services when there is economic uncertainty. Nithya Pramekumar explained that a risk management approach can be incorporated into the strategic plan. A final plan will be presented at the June board meeting for approval.

## **DISCUSSION ITEMS**

### **State Update**

Rusty Skinner updated the board on Bill 1507, noting three areas of discussion:

- Letter Grades: Each workforce region will be given a letter grade based on metrics and performance indicators.
- Credentials of Value: Although the list of credentials has not been finalized yet, there is growing concern that many vital first tier certifications will not be included in the final list. The lack of approved credentialing will have a negative impact on funding for programs that are currently provided through the school system, as well as the under-skilled populations that CLM serves.
- Regional Realignment: CareerSource Florida is vetting a consultant that plans to

meet with workforce representatives and local elected officials to discuss the impact of consolidating workforce regions. The State believes that consolidating the regions will improve cost efficiencies. Rusty Skinner reviewed a variety of reports. He presented the statewide performance indicators report, reflecting our programmatic success in comparison to the other regions and finally reviewed a collaboration summary on how CLM works with community partners and other regions for cost efficiencies. Any new updates will be provided to the board as they come.

#### Workforce Issues that are Important to our Community

Al Jones recommended board members introduce themselves at board meetings as a way for new members to get to know their fellow community partners and to grow networking opportunities.

#### **ACTION ITEMS**

None

#### **CONSENT AGENDA**

##### Performance and Monitoring – 2/8/2022

No Action Items

In the absence of Committee Chair Ted Knight, Cathy Galica provided a summary of the committee activities.

##### Business and Economic Development – 2/10/2022

No Action Items

In the absence of Committee Chair Pete Beasley, who had to leave early, Cory Weaver provided a summary of the committee activities.

##### Career Center – 2/17/2022

Welfare Transition Career Coach

Re-entry Navigator

Staffing Firm

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

##### Marketing and Outreach – 2/23/2022

No Action Items

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

##### 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

Brandon Whiteman and Rusty Skinner provided a summary of the committee activities.

Kathy Judkins made a motion to approve all consent agenda items. Kevin Cunningham seconded the motion. Motion carried.

**PROJECT UPDATES**

None

**MATTERS FROM THE FLOOR**

**ADJOURNMENT**

There being no further business, the meeting was adjourned at 1:44 p.m.

**APPROVED:**

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DRAFT



## **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:**

Kathy Judkins made a motion to approve all consent agenda items. Kevin Cunningham seconded the motion. Motion carried.



## **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:**

Kathy Judkins made a motion to approve all consent agenda items. Kevin Cunningham seconded the motion. Motion carried.



## **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 will 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:**

Kathy Judkins made a motion to approve all consent agenda items. Kevin Cunningham seconded the motion. Motion carried.



## **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:**

Kathy Judkins made a motion to approve all consent agenda items. Kevin Cunningham seconded the motion. Motion carried.



## **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:**

Kathy Judkins made a motion to approve all consent agenda items. Kevin Cunningham seconded the motion. Motion carried.





## **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:**

Kathy Judkins made a motion to approve all consent agenda items. Kevin Cunningham seconded the motion. Motion carried.



## **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:**

Kathy Judkins made a motion to approve all consent agenda items. Kevin Cunningham seconded the motion. Motion carried.



## **RECORD OF ACTION/APPROVAL**

**Board Meeting  
Tuesday, June 7, 2022**

### ***TOPIC/ISSUE:***

Approval of 2022-2023 contracts

### ***BACKGROUND:***

### ***POINTS OF CONSIDERATION:***

Please see the attached Contracts Spreadsheet attached for details. Contracts with Board Member conflicts require approval from 2/3rds of the members present.

### ***STAFF RECOMMENDATIONS:***

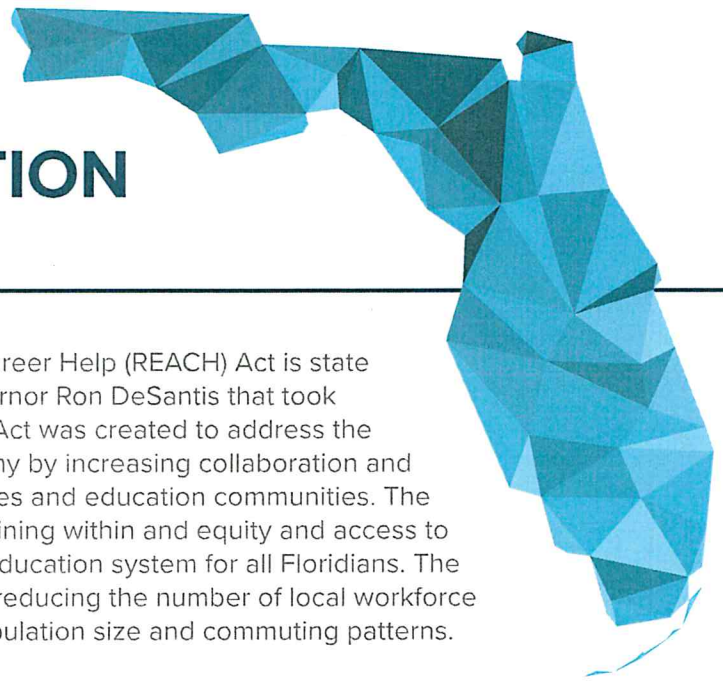
### ***COMMITTEE ACTION:***

### ***BOARD ACTION:***

## CareerSource CLM - All Contracts July 1, 2022 - June 30, 2023

Item #	Contractor	Purpose/Scope of Work Summary	Funding	Board Action	Contractor / SubContractor	Conflicts
		<b>Master Contracts Requiring 2/3rds Vote</b>				
1	Citrus County Chamber of Commerce	Employer outreach and job development services	\$ 20,000.00		C	John Murphy, Carl Flanagan, Kevin Cunningham
2	Levy County Schools	Training services and facility usage and rental fees. Cost is an average based on prior year usage. This is a blanket approval but to not exceed.	\$ 10,000.00		C	Christie McElroy
3	College of Central Florida	Staff training services and facility usage and rental fees. This is a blanket approval but to not exceed. Have been determined to be contractor services and not subrecipients for the purpose of providing goods or services. Cost is an average based on prior year usage.	\$ 400,000.00		C	Mark Paugh
		<b>Master Contracts Requiring 2/3rds Vote - OJT, CBT, or Apprenticeship Training Opportunities</b>				
4	ANCORP	CBT and/or OJT Training Services - approval but to not exceed	\$ 20,000.00		C	Arno Proctor
5	Key Training Center	CBT and/or OJT Training Services - approval but to not exceed	\$ 20,000.00		C	Theresa Flick
6	Lockheed Martin	CBT and/or OJT Training Services - approval but to not exceed	\$ 20,000.00		C	Jeff Chang
7	A&M Manufacturing	CBT and/or OJT Training Services - approval but to not exceed	\$ 20,000.00		C	John Hemken
8	Ocala Housing Authority	CBT and/or OJT Training Services - approval but to not exceed	\$ 20,000.00		C	Judy Houlios
		<b>Contracts Not Requiring 2/3rds Vote</b>				
9	Ocala Metro Chamber & Economic Partnership (CEP)	Employer outreach and job development services. Have been determined to be contractor for services and not subrecipients for the purpose of providing goods or services.	\$ 30,000.00		C	
10	Marion County School Board	Staff training services and facility usage and rental fees. Cost is an average based on prior year usage. This is a blanket approval but to not exceed. Primary location for services is at MTC.	\$ 50,000.00		C	
11	Eckerd Connects	WIOA youth services provider, supportive services costs providing services to youth in all three counties	\$ 1,017,861.00		S	
12	Thomas P. Miller and Associates	One Stop Operator Contract	\$ 85,000.00		S	
13	Underwood and Sloan	Internal monitoring	\$ 50,000.00		C	
14	Powell and Jones	Joint auditing (Financial)	\$ 16,500.00		C	
15	Powell and Jones	Subrecipient monitoring	\$ 3,800.00		C	
16	CD Staffing	Payroll for PWE/PWI agreements	30% Mark up		C	
17	Region 6	Financial Services Agreement	\$ 55,000.00		C	

# REACH ACT ALIGNMENT EVALUATION



## WHAT

The Reimagining Education and Career Help (REACH) Act is state legislation signed into law by Governor Ron DeSantis that took effect on July 1, 2021. The REACH Act was created to address the evolving needs of Florida's economy by increasing collaboration and cooperation among state businesses and education communities. The Act also is designed to improve training within and equity and access to a more integrated workforce and education system for all Floridians. The REACH Act charges the state with reducing the number of local workforce development boards based on population size and commuting patterns.

## WHO

Under the REACH Act, this ecosystem for talent pipeline development includes CareerSource Florida, the state workforce development board; Florida's 24 local workforce development boards and the 100 career centers they oversee; the Department of Economic Opportunity; the Department of Education; the State College System; the State University System; and the Department of Children and Families. CareerSource Florida, in collaboration with the Governor's REACH Office, is leading the process to implement the legislation focusing on an inclusive process that engages all stakeholders.

## WHEN

As part of the REACH Act alignment evaluation process, CareerSource Florida has contracted with EY (Ernst & Young LLP) to conduct research and discovery. This includes listening to stakeholders, analyzing data, and examining solutions implemented in other states. Initial observations from Phase I will be reported to the CareerSource Florida Board of Directors June 9, 2022, with EY's summary report due June 30. It is envisioned that a second phase beginning in July will include a deeper analysis and more robust engagement with stakeholders and customers across the state. Alignment considerations are anticipated to be provided to the CareerSource Florida Board of Directors by the end of the year.

## WHY

The alignment evaluation process can help lead Florida's local workforce development boards in the response to the evolution in consumer preferences, workplace expectations, business needs, how people look for work, and even where and how they work. The goal is to deliver even more relevant services through system transformation and therefore improved outcomes for customers. The REACH Act emphasizes a customer-focused approach in exploring ways to better assist job seekers and businesses.

## WHERE

The alignment evaluation process encompasses all parts and partners across Florida, including CareerSource Florida, the 24 local workforce development boards, businesses and job seekers, to ensure equity and access for all Floridians.

## HOW

CareerSource Florida is committed to an open and transparent process of listening to stakeholders and finding transformative solutions for workforce development in Florida. Visit the REACH Act webpage on [careersourceflorida.com](https://careersourceflorida.com) for updates on the ongoing engagement process. Please complete the Alignment Feedback Form on the webpage to provide input or comments.





## Reimagining Education and Career Help (REACH) Act At-a-Glance

Florida's 2021 Reimagining Education and Career Help Act, known as the REACH Act, is a comprehensive blueprint for enhancing access, alignment and accountability across the state's workforce development system.

This workforce development system, which spans the state's education, workforce and social safety net systems, is defined in the REACH Act as the "entities and activities that contribute to the state's talent pipeline system through education, training, and support services that prepare individuals for employment or career advancement, and the entities that are responsible for oversight or conducting those activities such as CareerSource Florida, Inc., local workforce development boards, one-stop career centers, the Department of Economic Opportunity, the Department of Education, and the Department of Children and Families."

The REACH Act positions Florida to help those with barriers to education and employment become self-sufficient, giving them better access to good jobs and career pathways that offer economic opportunity. In doing so, it takes a system-wide approach to achieving the following actions:

- Establishes the Office of Reimagining Education and Career Help (REACH) in the Executive Office of the Governor to facilitate coordination and alignment of entities responsible for the state's workforce development system.
- Requires the REACH Office to create a "no-wrong-door entry" strategy to help Floridians access services from any workforce partner.
- Directs the Department of Economic Opportunity, in consultation with the CareerSource Florida Board of Directors and others, to implement a "consumer-first workforce system" that improves coordination among one-stop career center partners through an integrated system that includes common registration and intake, benefits screening, and case management.
- Requires the CareerSource Florida Board to appoint a Credentials Review Committee to identify degree and nondegree credentials of value for approval by the state workforce development board and inclusion on a Master Credentials List to be provided to the State Board of Education.
- Adds Workforce Innovation and Opportunity (WIOA) Act partners representing the Department of Education's Division of Vocational Rehabilitation and Division of Blind Services, as well as the Department of Children and Families, to the CareerSource Florida Board. *(Note: The Division of Blind Services already is represented on the state workforce development board.)*
- Creates a workforce opportunity portal to provide Floridians with access to federal, state and local workforce services and a global view of workforce-related program data including education and training options, real-time labor market information, career planning and career services tools, and other support linked to in-demand jobs.



- Requires the Department of Economic Opportunity and the Department of Children and Families to evaluate the impact of workforce services on participants receiving benefits and welfare transition programs.
- Seeks to provide Florida additional flexibility in overseeing the state's workforce investment and to streamline the administration of Florida's workforce development system while also increasing accountability by charging the Department of Economic Opportunity with preparing a federal waiver. The waiver would allow CareerSource Florida to fulfill the roles and responsibilities of local workforce development boards or reduce the number of local workforce development boards.
- Requires the assignment of a letter grade for local workforce development boards based on criteria including performance accountability measures, return on investment and improvement of the long-term self-sufficiency of participants.
- Creates staggered eight-year term limits for some members of local workforce development boards and establishes some additional performance and accountability requirements for board compliance.
- Authorizes the Department of Economic Opportunity to prepare a federal waiver to be submitted by the Governor to create greater flexibility and strategic investment in Florida's WIOA implementation.
- Charges the Labor Market Estimating Conference as the entity responsible for determining Florida's real-time supply and demand in the labor market.
- Provides guidelines for consistency of data collection across the workforce and education systems.
- Directs the Department of Education, working with other entities, to develop a workforce development metrics dashboard that shows the impact of workforce-related programs on credential attainment, training completion, degree attainment and participants' wages.
- Requires the Department of Economic Opportunity, with input from the state workforce development board and others, to establish WIOA eligible training provider criteria focused on participant outcomes.
- Establishes the Open Door Grant Program to create a demand-driven supply of credentialed workers for high-demand occupations and expand the affordability of workforce training, certification and credentialing programs.
- Creates the Money-Back Guarantee Program, which will establish a tuition refund for students who do not find a job within six months after completing select programs designed to prepare them for in-demand occupations.

For more details about the far-reaching blueprint that seeks to address the evolving needs of Florida's economy, go to [Online Sunshine – Section 14.36, Florida Statutes](#).



## **Reimagining Education and Career Help (REACH) Act Alignment Evaluation Frequently Asked Questions**

### **1. Q: What is the REACH Act?**

**A:** The Reimagining Education and Career Help (REACH) Act is bi-partisan, unanimously approved state legislation signed into law by Florida Governor Ron DeSantis on June 24, 2021. The REACH Act, which took effect July 1, 2021, was created to address the evolving needs of Florida's economy by increasing the level of collaboration and cooperation among state businesses and education communities while improving training within and equity and access to a more integrated workforce and education system for all Floridians. Among its requirements, the REACH Act charges the state with reducing the number of local workforce development boards "based on population size and commuting patterns."

The law takes an integrated, collaborative approach to strengthen partnerships and enhance access to education, training and employment opportunities within and across key workforce, education and support services systems that are the backbone of Florida's comprehensive workforce development ecosystem.

Under the REACH Act, this ecosystem for talent pipeline development includes CareerSource Florida, the state workforce development board; Florida's 24 local workforce development boards and the 100 career centers they oversee; the Department of Economic Opportunity; the Department of Education; the State College System; the State University System; and the Department of Children and Families.

The landmark 118-page legislation sets expectations and challenges Florida to make a good talent pipeline development ecosystem even better through transformation focused on improvements to alignment of, access to and equity in Florida's workforce and education systems leading to stronger outcomes.

### **2. Q: How does the REACH Act say the number of local workforce development boards will be determined?**

**A:** Pages 44-45 of the REACH Act outline the following as considerations in the alignment of local workforce development boards:

(4) **WAIVERS.** —The department (state Department of Economic Opportunity) shall prepare a federal waiver for the Governor to submit to the United States Department of Labor that:

(a) Allows the state board (CareerSource Florida Board of Directors) to fulfill the roles and responsibilities of local workforce development boards or that reduces the number of local workforce development boards based on population and commuting patterns to:

1. Eliminate multiple layers of administrative entities to improve coordination of the workforce development system.
2. Establish consistent eligibility standards across the state to improve the accountability of workforce-related programs.



3. Provide greater flexibility in allocating resources to maximize the funds directed to training and business services.

(b) Allows the Governor to reallocate funds among local areas that have a demonstrated need for additional funding and programmatic outcomes that will maximize the use of the additional funds to serve low-income individuals, public assistance recipients, dislocated workers and unemployment insurance claimants.

Read the full REACH Act legislation [at this link](#).

**3. Q: How will workforce services be impacted if the number of local workforce development boards is reduced?**

**A:** The REACH Act aims to improve services for job seekers, workers and businesses by increasing collaboration, coordination and consistency. The needs of customers will guide the evaluation process.

**4. Q: Who is leading the alignment evaluation process?**

**A:** The statewide implementation of the REACH Act is being led by and coordinated through the Governor's REACH Office. CareerSource Florida is coordinating the evaluation of alignment considerations for local workforce development boards in collaboration with the Department of Economic Opportunity and the REACH Office, with input from state and local leaders in business, education and workforce development, representatives of customer groups and other stakeholders including local elected officials. In collaboration with the Governor's REACH Office, CareerSource Florida is beginning what is anticipated to be a multi-phase, data-driven initiative with increasing opportunities for state and local stakeholder engagement and input to help shape the research, evaluation and recommendations.

**5. Q: What principles are guiding the alignment evaluation process?**

**A:** CareerSource Florida, in collaboration with the Governor's REACH Office, identified the following principles to serve as a guide in the alignment evaluation process:

- I. Prioritize implementation of the REACH Act and legislative directive to enhance alignment and accountability.
- II. Identify considerations that are responsive to the needs of job seeker and business customers while prioritizing access to services and efficient use of available resources.
- III. Commit to open and transparent processes through the iterative phases.
- IV. Engage in holistic listening to drive transformative solutions.
- V. Communicate proactively to audiences and stakeholders throughout the journey.

**6. Q: How can a new alignment of local workforce development boards improve outcomes for Floridians?**

**A:** The alignment evaluation process can help lead Florida's local workforce development boards in the response to the evolution in consumer preferences,

workplace expectations, business needs, how people look for work, and even where and how they work. The goal is to deliver even more relevant services through system transformation and therefore improved outcomes for customers. The REACH Act emphasizes a customer-focused approach in exploring ways to better assist job seekers and businesses.

**7. Q: Is one option to maintain services as they currently exist?**

**A:** The REACH Act specifically references reducing the number of local workforce development boards based on population and commuting patterns. It does not preclude the consideration of other relevant factors to achieve the act's desired goal.

**8. Q: What is the process of evaluating alignment options for local workforce development boards?**

**A:** As the Governor's principal workforce development policy organization, CareerSource Florida is conducting a research and discovery process that includes listening to local workforce development board leaders, elected officials, leaders in business and education and other stakeholders. This work is being conducted in collaboration with the Governor's REACH Office.

For Phase I, CareerSource Florida has contracted with EY (Ernst & Young LLP) to:

- Conduct local and state research and analyze data on Florida's workforce system, including workforce development boards.
- Examine other states that have undertaken local workforce development board alignment.
- Conduct initial listening sessions with local and state leaders, including local workforce development boards, and businesses.
- Present an initial summary of what was learned during Phase I and what could be undertaken as important next steps and goals in Phase II. Initial observations from Phase I will be reported to the CareerSource Florida Board of Directors at its quarterly meeting on June 9, 2022, in Tallahassee and in EY's summary report on Phase I of this alignment evaluation, which is due June 30.

**9. Q: How can I share my point of view on the alignment evaluation process?**

**A:** The initial phase of the process involves listening sessions for local workforce development board leaders, businesses and stakeholders. A webpage has been created with additional information at [careersourceflorida.com/boardroom/reach-act](https://careersourceflorida.com/boardroom/reach-act). Stakeholders and interested parties may leave comments about or insights on alignment considerations at the form available on the webpage.

**10. Q: What is the timeline for the process?**

**A:** CareerSource Florida has started the first phase of the process with discovery and listening. Beginning in July, it is envisioned that Phase II will include a deeper analysis



and more robust engagement with stakeholders and customers across the state. Alignment considerations are anticipated to be provided to the CareerSource Florida Board by the end of the year.

**11. Q: What data and potential approaches will be considered in alignment discussions?**

**A:** CareerSource Florida is beginning this alignment evaluation work in response to the REACH Act by undertaking discovery which includes compiling data and listening to stakeholders. More in-depth analysis of approaches to alignment will occur after this initial phase. The Department of Economic Opportunity, charged with administering state and federal workforce initiatives, uses data points — as outlined in law — to analyze different scenarios that may be included in the later phases of CareerSource Florida's review process. This analysis of labor market information is intended to support the baseline of discovery in Phase I.

**12. Q: Has alignment taken place in other states? If so, what can we learn?**

**A:** Yes. Alignment and changes in how services are delivered are being discussed nationally and are taking place in multiple states, including North Carolina, Iowa and Tennessee. Consulting firm EY is researching how other states have undertaken alignment actions, and those findings will be included in their report this summer. That report will be shared on the CareerSource Florida website.

**13. Q: How can alignment benefit the 24 local workforce development boards, Florida counties, and the businesses and job seekers served by the state workforce system?**

**A:** The objective of the REACH Act is to provide Florida job seekers and businesses with better aligned and more effective workforce and education systems while enhancing services, equity, and access for all by:

1. Eliminating multiple layers of administrative entities to improve coordination of the workforce development system.
2. Establishing consistent eligibility standards across the state to improve the accountability of workforce-related programs.
3. Providing greater flexibility in allocating resources to maximize the funds directed to training and business services.

**14. Q: Where can I get more information?**

**A:** The REACH Act webpage on [careersourceflorida.com](https://careersourceflorida.com) has up-to-date information about the REACH Act and the ongoing engagement process. Updates will be provided through every phase of the process. Stakeholders and interested parties may leave comments about or insights on alignment considerations at [careersourceflorida.com/boardroom/reach-act](https://careersourceflorida.com/boardroom/reach-act).

### FINANCIAL DISCLOSURE

2021-2022 Monitoring Results								
Workforce Program	Issue	Applicable Reference	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Recommendation
<b>FINANCIAL DISCLOSURE</b>	<p>1. There were instances of board members not filing financial disclosure statements by the July 2021 deadline. Additionally, one board member did not file a financial disclosure statement within 30 days of their appointment date.</p> <p>Note: this is a combined issue.</p>	<b>Authority – Sections 112.3145 and 445.007, Florida Statutes; and DEO Final Guidance (FG-075), Required Financial Disclosure.</b>	N/A	N/A	N	Y	N/A	The LWDB must ensure all board members submit completed financial disclosure statements by the required deadline.
<b>Totals</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	

## LOCAL DEO MERIT STAFFING STRUCTURE

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

## SECTOR STRATEGIES

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

## BOARD GOVERNANCE

2021-2022 Monitoring Results								
Workforce Program	Issue	Applicable Reference	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Recommendation
<b>BOARD GOVERNANCE</b>	1. A few board members did not complete annual training for 2020 – 2021. Additionally, several board members have not completed the annual training for 2021 – 2022.	<b>Authority – WIOA, Section 107; 20CFR 679.300-679.430; Chapter 445.007, Florida Statutes; Administrative Policy 91; Grantee – Subgrantee Agreement</b>	<b>N/A</b>	<b>N/A</b>	<b>N</b>	<b>Y</b>	<b>N/A</b>	The LWDB must ensure that all board members complete New Board Member Training and Annual Board Member Training in accordance with law and policy.
	2. The LWDB governing documents do not disclose the length of retention for minutes of actions take by the Board.	<b>Authority - 20 CFR 679.370-679.410, Section 445.003 - 009 F.S.</b>	<b>N/A</b>	<b>N/A</b>	<b>N</b>	<b>Y</b>	<b>N/A</b>	The LWDB must maintain and archive records in compliance with Federal, State and Local polices and procedures.
<b>Totals</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>0</b>	

## WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA)

# Local Workforce Development Board Letter Grade Formula



The Reimagining Education and Career Help Office

# Statutory Authority

Section 14.36(3)(h), *Florida Statutes* – Title IV, Executive Branch; Chapter 14, Governor; Reimagining Education and Career Help Act:

*Develop the criteria for assigning a letter grade for each local workforce development board under s. 445.004. The criteria shall, in part, be **based on local workforce development board performance accountability measures and return on investment**. The **majority** of the grade shall be based on the improvement by each local workforce development board in the long-term self-sufficiency of participants through outcome measures such as **reduction in long-term public assistance** and the **percentage of participants whose wages were higher after program completion compared to wages before participation in a program**.*



# Project Timeline

## 2021

- **November** – Constituted work group and established bi-weekly meeting cadence
- **December** – Conducted listening session with board representatives & added three board representatives to work group

## 2022

- **January** – Surveyed boards to learn about local performance measures
- **January – April** – Reviewed potential measures and conducted work sessions on formula
- **April 28** – Solicited feedback on draft measures from listening session participants
- **May 23** – CareerSource Florida Virtual Partner Council meeting with LWDBs Executive Directors and CEOs
- **June 9** – Present letter grade formula to the CareerSource Florida Board of Directors





# Measure Development

The workgroup developed and agreed upon ten guiding principles for the development of measures across four categories of board activity to grade:

1. Employment Services
2. Training Services
3. Business Services
4. Economic Self-Sufficiency



# Guiding Principles

1. Meet all statutory requirements for the new letter grade system so Floridians can know how well their local boards are performing in the domains of employment, training, and business services.
2. Maintain consistency with existing federal and state accountability mechanisms.
3. Leverage existing measures and data where possible and appropriate.
4. Include valid measures from within the program year wherever appropriate to minimize the time between services provided and the measured outcome.
5. Incentivize improvement.
6. Minimize perverse incentives and unintended consequences.
7. Ensure that boards are not punished for serving customers with the most significant barriers.
8. Assure quality of data through replication and/or systematic technical review.
9. Promote transparency by sharing documentation that describes all data and calculations in the formula.
10. Give boards the opportunity to review draft formulas and provide feedback.



# Formula Overview

Seven weighted measures totaling 100% and one “extra credit” measure worth up to 5 percentage points:

- **Measure 1 – 20%:** Employment and Training Services (WIOA measures)
- **Measure 2 – 10%:** Percent Trained
- **Measure 3 – 25%:** Earning Increase for WIOA Adult, WIOA DW, and WP Participants
- **Measure 4 – 10%:** Completion-to-Funding Ratio
- **Measure 5 – 5%:** Repeat Business
- **Measure 6 – 5%:** Business Penetration
- **Measure 7 – 25%:** Reduction in Public Assistance (not yet available)
- **Extra Credit Measure – up to additional 5 percentage points:** Serving Individuals on Public Assistance (not yet available)



# Formula Steps

1. Calculate raw percentage for measure, e.g. 30%
2. Calculate percentage of target achieved: If the measure has a target below 100%, divide raw percentage by measure target, capping at 100%
  1. Example:  $30\% \text{ (raw percentage)} / 25\% \text{ (target)} = 120\%$ , which is then capped at 100%
3. Multiply the result of #2 by the measure's weight
  1. Example:  $100\% \text{ (percentage of target)} * 10\% \text{ (measure weight)} = 10 \text{ percentage points}$
4. Repeat for all measures
5. Sum up weighted results for all measures (maximum of 100 across all seven measures)



# Measure #1: Employment and Training Services Outcomes – Weight = 20%

Category: Employment and Training Services

- **Denominator:** The number of federal measures for WIOA Title I and 3 programs (18 for 2020 program year)
- **Numerator:** The number of measures for which the board reached at least 90% of the negotiated local target
- Federal primary indicators for WIOA programs: Adult = 5 measures; Dislocated Worker = 5; Youth = 5; Wagner Peyser = 3; Total = 18 for 2020 program year



# Measure #2: Percent Trained

## Weight = 10%

Category: Training Services

- **Denominator:** All open participations (SNAP E&T, WT, Adult, Dislocated Workers, National Dislocated Workers Grant, Youth, Wagner-Peyser, Trade Adjustment Assistance , WIOA funded grants)
- **Numerator:** Received training services
- Target: 25%, capped (based on analysis of historical data)



# Measure #3: Earning Increase for WIOA Adult, WIOA DW, and WP Participants – Weight = 25%

Category: Employment and Training Services, Self-Sufficiency

- **Denominator:** EERQ2 Adult, DW, and WP Exiters (from measure #1)
- **Numerator:** Exiters with quarterly earnings two quarters after exit higher than quarterly earnings two quarters prior to participation
- Target: 45%, capped (based on analysis of historical data)



# Measure #4: Completion to Funding Ratio

## Weight = 10%

Category: Employment and Training Services

- **Denominator:** Share of program allocations (WIOA, TANF, RESEA, SNAP, TAA, VETS)
- **Numerator:** Share of WIOA program exiters (AD, DW, Youth, WP)
- The calculation is capped at 1.00





# Measure #5: Repeat Business

## Weight = 5%

Category: Business Services

- **Denominator:** All employer worksites served with core services in the prior three years from the reporting year
- **Numerator:** Employers from the denominator who received a core service in the most recent year
- Target: 35%, capped (based on analysis of historical data)



# Measure #6: Business Penetration

## Weight = 5%

Category: Business Services

- **Denominator:** All active employer worksites in Employ Florida
- **Numerator:** Employers from the denominator who received a core service
- Year-over-year percentage point difference between prior and current year

Year-Over-Year Change	Score
>= 4% increase	100%
2% – 3.9% increase	90%
0% – 1.9% increase	80%
-0.1% – -2% decrease	70%
-2.1% – -4% decrease	60%
-4.1% – -6% decrease	40%
-6.1% – -8% decrease	20%
< -8% decrease	0%



# Measure #7: Reduction in Public Assistance

## Weight = 25%

Category: Employment and Training Services, Self-Sufficiency

- **Denominator:** Number of exiters across all customer groups who received SNAP or TANF cash assistance during period of participation
- **Numerator:** Number of individuals who were no longer receiving SNAP or TANF in the fourth quarter after exit
- Target: TBD



# Extra Credit Measure: Serving Individuals on Public Assistance

## Bonus of up to five percentage points

Category: Employment and Training Services, Self-Sufficiency

- **Denominator:** All open participations (SNAP E&T, WT, Adult, Dislocated Workers, National Dislocated Workers Grant, Youth, Wagner-Peyser, Trade Adjustment Assistance, WIOA funded grants)
- **Numerator:** Number of individuals who received SNAP or TANF benefits during their period of participation
- **Target:** TBD



# Data Will Be Available for Review

- We are not producing baseline Program Year 2021 grades until data reporting is complete and all the data are available
- DEO will make all data and calculations available online through the Workforce Metrics platform hosted by CareerSource Florida
- SQL queries will be available from DEO upon request



# Data Sources

Measure #	Data Sources
I	ETA 9173 Reporting, Floridajobs.org - <a href="http://floridajobs.org/local-workforce-development-board-resources/program-monitoring-and-reports/state-program-reports/common-measures-performance-reports">http://floridajobs.org/local-workforce-development-board-resources/program-monitoring-and-reports/state-program-reports/common-measures-performance-reports</a>
2	File(s): ETA9173, AD, DW, Youth, WP, DWG, WIOA funded grants; TAPR – TAA; DEO Database Extract - SNAP E&T, WT
3	ETA 9173
4	DEO Finance & Accounting, ETA9173 Exiters
5	DEO Employ Florida Extract
6	DEO Employ Florida extract
7	DEO – DCF data match
EC	DEO – DCF data match



# Questions/Comments?

- **Measure 1** (slide 8): Employment and Training Services (WIOA measures)
- **Measure 2** (slide 9): Percent Trained
- **Measure 3** (slide 10): Earning Increase for WIOA Adult, WIOA DW, and WVP Participants
- **Measure 4** (slide 11): Completion-to-Funding Ratio
- **Measure 5** (slide 12): Repeat Business
- **Measure 6** (slide 13): Business Penetration
- **Measure 7** (slide 14): Reduction in Public Assistance
- **Extra Credit Measure** (slide 15): Serving Individuals on Public Assistance



First, it would be helpful to have access to or be provided any historic data used to support the recommendations included in the report.

Rather than issue a baseline report, there should be a “test report” with backup data provided to the local system so that any anomalies can be determined before a baseline report is issued. The concern is that if there is not a test report, data inconsistencies or overall system concept errors will cloud the local boards’ reputation.

Secondly, several terms have been used without definition. These terms need to be defined into precise federal measure data terms.

There are inconsistencies in measures in the “groups” used in the metrics. The groups should have funding and mission to provide the services included in the various measures.

Terms “exiter” and “completer” has been used in various measures. They should be consistent or clearly defined.

Guiding Principles 9 and 10 have not been met.

Project Timeline:

- Why only three boards when most frontline, programmatic knowledge rests at the local level?

### **Measure 1**

- Will this be annual or quarterly report? Will MSG be included quarterly since it is an annual measure? The current Indicators of Performance penalizes if MSG is not met within the measure itself.
- This measure is based on our federal performance measures and the weight of the measure should reflect the importance of those measures. If its relative value is diminished and other measures carry more performance value, local emphasis could diminish resulting in the unwanted consequence of a reduction in federal performance.

### **Measure 2**

- Remove SNAP E&T due to such limited funding to perform any quality training services (SNAP is co-enrolled in WIOA most of the time when training funds are needed).
- Remove Wagner Peyser since WP is general labor market and not linked to training. AT MINIMUM clarify the enrollment status of WP – Registrant vs. Participant.



- Double check 25% threshold – this seems extremely high. Methodology on how this has been calculated.
- Denominator:
  - The inclusion of Wagner-Peyser (WP) and National Dislocated Worker Grant (NDWG) participants does not align with the perceived goal of increasing training.
    - WP is a labor exchange program. These customers are primarily ONLY looking for a job. If we provide job search services, they become a participant and are presumably one of the “open participations” one of many terms that needs further definition
    - WP customers who are interested in training, if enrolled, would be a participant under WIOA. Including all WP participants would not be reflective of the actual number of customers who seek training.
    - Not all WP customers are eligible for WIOA funded training. They may be individuals who are working and searching for a different/better job.
    - SNAP provides no funding for training.
    - WT is a “work first” program with process limitations on the ability to provide training. Very limited training funds within WT allocation.
    - NDWG participants are almost wholly those affected by a disaster and are provided with temporary jobs.
    - The historic anecdote regarding federal funded programs is that they have enough funding to provide services, including training to approximately 10% of those eligible.
    -
- Numerator:
  - “Training Services” is not defined. Does this include “training” in interviewing for a job, resume preparation, etc.?
  - See above comment about funding to support services.
- Target:
  - Given the comment on funding, the absolute maximum that could be reached, with a “broader than ITA” definition of training is 10%
  - The target is unrealistic based upon funding, suggest a target of 10%, to be reviewed in 2023.

### **Measure 3**

- Clarify enrollment status of WP – Registrant vs. Participant. We should not be rated on customers we never work with that are ‘window shopping’.
- Denominator
  - The inclusion of WP participants is of concern. As stated earlier, most of these customers are doing job search/labor market exchange services. The result would be that the job moves are primarily lateral in “normal times.” In times such as these the

wage increases are driven by market forces and not reliant upon individual skill improvements or additions. In other instances, such as an economic downturn, wages for WP customers are highly likely to decrease. This group (WP) should be removed from the Denominator as those in training will be enrolled under an appropriate WIOA program.

- The weight should be reduced to 20%

#### **Measure 4**

- Clarify 'WIOA Program Exiters' in the numerator when WP is included....
- Denominator includes non-training funds, while numerator seems to look at training. As funding continues to contract, it will become harder to meet this measure
- The term "Completions" is not defined. Does this include persons who are participants and only receive initial services, leaving with a positive outcome or must they be enrolled in a training activity?
- If training, then the level of overall funding as well as the anecdote of 10% will limit the ability to serve.

#### **Measure 5**

- This was a pilot measure under WIOA. The problem with this measure is as you serve businesses you come to a point where you must take a hit for year in order to reset your goal number to ensure success in the future year.
- Denominator:
  - The term "worksites" needs definition. Employers with multiple locations (worksites in EF) do not have services recorded for each worksite. A Worksite's function is to provide an accurate location for job listings. Services are credited to the "master account."
  - Does this term also include work experience worksite listings?

#### **Measure 6**

- The term "worksites" is again used without full definition.
- This measure is largely driven by labor market condition. Currently we have a very large number of employer listings. In a downturn economy we will have fewer. There should be some type of "environmental" adjustment in this calculation.
- Additionally, someone achieving a score of 100 in one year because of conditions, can, at best, only get a score of 80 if that level is maintained during the second year.
- This is another case of funding cuts making it difficult to continually increase performance year over year due to reduced staffing.

### **Measure 7**

- Recommend weight be reduced to 20%
- Inconsistent terms “exiter” and “completer” has been used in various measures. They should be consistent or clearly defined.
- Will the numerator include transitional? What is considered ‘exit date’? Is it the date the case is closed due to earnings?

## Alternative Letter Grade Proposal

The recent presentation on Letter Grades raised concerns on several areas of the proposed measures. These concerns were from local professionals with knowledge of the practical, not theoretical, business situations and the strength of the data sources.

The approach, put together in a relatively short time frame reaches outside proven data sources and, in some instances, would appear to fashion an unrealistic combination of data streams that would negatively impact the workforce system's proven track record.

Rather than take a giant step in the first year, an alternative, multi-year(step), process is suggested. This process would use proven data/performance reports in the first year and expand on those measures in the future.

1. Use the current federal indicators of performance. This can be done by using all 18 to develop the average grade or collapse that into the main compilations: Adult, Youth, Dislocated Workers and Wagner-Peyser.

The relative value of these would be 45% of the total grade. This ensures that the REACH Act requirement that self-sufficiency measures are more weighted.

2. Use two TANF measures to be the basis of the 55%.
  - a. TANF customers completing with a job.
  - b. TANF customers completing with a job and retaining employment after two quarters.

There are two steps to self-sufficiency: getting that job and retaining it. This will establish a base level of performance upon which improvement can be measured for scoring/letter grading.

This approach would establish initial grades and additional measures could be added during the next year or years. It allows a review of definitions, data sources and methodology. It will also ensure that those additional measures have been tested, targets set and understood by all parties. This will go a long way to reduced system "gaming".



## **RECORD OF ACTION/APPROVAL**

### **Board Meeting Tuesday, June 7, 2022**

#### **TOPIC/ISSUE:**

Strategic Plan

#### **BACKGROUND:**

Our last strategic planning took place in 2015. We began the process of developing an updated strategic plan in October 2021. We felt it was important to begin strategizing on how to best accomplish the goals set forth in the REACH act, created through HB1507.

#### **POINTS OF CONSIDERATION:**

Community input sessions took place in the three-county region in the latter part of 2021. Additional follow up sessions took place in December 2021 for those partners that had additional input or were unable to attend the first sessions. The input gathering efforts concluded with a meeting with the board of directors on February 9, 2022, to review a draft plan and garner final input with a goal of presenting the final plan to the full board at the March 9, 2022 meeting. The planning schedule was as follows:

October 19-22, 2021 – First stakeholder meetings in each county  
December 14-16, 2021 – Follow up stakeholder meetings in each county  
February 9, 2022 – Strategic Planning session – CLM Board of Directors  
March 9, 2022 – Rollout of final plan

#### **STAFF RECOMMENDATIONS:**

Approve the new strategic plan as presented.

#### **COMMITTEE ACTION:**

#### **BOARD ACTION:**

# For Review



## 2022 STRATEGIC PLAN



PREPARED BY  
THOMAS P. MILLER & ASSOCIATES



# For Review 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.



# For Review

## BOARD OF DIRECTORS

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**Kim Baxley – Chair**

Central Florida Electric Cooperative

**Brandon Whiteman – Vice Chair**

Two Twelve Benefits

**Fredrick Morgan – Treasurer**

I.B.E.W. Local Union 222



**Pete Beasley**

Rasmussen University

**Jeff Chang**

Lockheed Martin

**Kevin Cunningham**

RE/Max Realty One

**Carl Flanagan**

Flanagan Business Consulting

**Theresa Flick**

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A&M Manufacturing

**Judy Houlios**

Ocala Housing Authority

**Lewrissa Johns**

Suncoast Credit Union

**Kathy Judkins**

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**Albert Jones**

AutoZone Inc.

**Ted Knight**

United States Marine Corps League

**Jorge Martinez**

Florida Department of Children and Families

**Nelson “Lanny” Mathis, Jr.**

I.B.E.W. Local Union 1205

**Christie McElroy**

Levy County School Board

**John Murphy**

Citrus County Chronicle

**Dr. Mark Paugh**

College of Central Florida

**Arno Proctor**

ANCORP

**Pat Reddish**

Consultant

**Debra Stanley**

Citrus County School District

**Equilla Wheeler**

TransformCo

**Angie White**

Department of Education/Vocational Rehabilitation

**Tiffany Wiggins**

Katch 22



# For Review

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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

- 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.

# For Review

## 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



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(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.



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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

# For Review

## MISSION + VISION

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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.

## STRATEGIC PLAN GOALS

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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.
- 1.5 – Consult with sector subject matter experts on the board to identify industry champions.

## STRATEGIC PLAN GOALS

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### **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.
- 2.5 – Improve outreach to underrepresented populations to foster diversity, equity, and inclusion among jobseekers.
- 2.6 – Implement a risk mitigation and emergency management plan to ensure continuity of services.
- 2.7 – Drive the board of directors to utilize CSCLM services for their own business or organization.

### **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.
- 3.5 – Leverage board member relationships and connections to reach customers and partners in new venues.

### **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
- 4.4 – Equip the board of directors with tailored communication resources to use in their own personal and professional networks to promote CSCLM services.



# For Review

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

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- 1.1 – Continue to focus on sector specific services to businesses, including industry representatives and messaging.
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- 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.
- 1.5 – Consult with sector subject matter experts on the board to identify industry champions.

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. The Board of Directors are an additional resource to be leveraged when working on improving partnership and outcomes for industry. Utilizing a competency matrix, staff should partner with board members to work together on industry projects and outreach.

CSCLM can build on the existing targeted in-demand industries in the region, which are



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

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. These 6 in-demand industries 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.

**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

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.

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

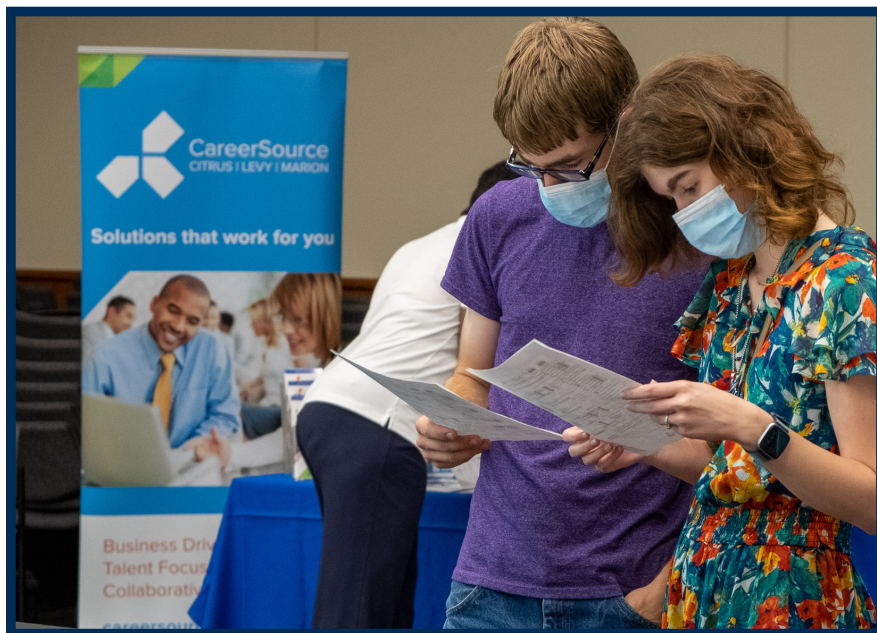
# For Review

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

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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.



# For Review

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

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- 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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- 2.7 – Drive the board of directors to utilize CSCLM services for their own business or organization.

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.

# For Review

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

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 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 embed diversity, equity and inclusion in service delivery, focusing on a human centered design when counseling customers and center their needs to guide decision-making. Additionally, outreach to underrepresented populations and minority-owned businesses will be essential in order to promote equity and access to workforce resources.** Services that provide a strong value-add such as English literacy, financial literacy, and digital literacy must be offered across the board.

Embracing and preserving the strong service delivery structure that CSCLM currently provides should be a priority for the board moving forward. As community and business leaders, board members can work with CSCLM staff to identify areas within their organizations where CSCLM services can be better utilized. The board should also work to review and implement an emergency management plan. Considering the speed the world changed in 2020, anticipating and planning for what seems unlikely now can mitigate risks and ensure the service delivery CSCLM is known for can adapt quickly in the future.



# For Review

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

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- 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.
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- 3.5 – Leverage board member relationships and connections to reach customers and partners in new venues.

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. **Well-connected board members can leverage their networks and be an ambassador for CSCLM services.** 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.



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

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- 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.
- 4.4 – Equip the board of directors with tailored communication resources to use in their own personal and professional networks to promote CSCLM services.

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. Assist the board with harnessing this messaging to use in their own personal and professional networks, and encourage their use of talking points that allow the board to target their own outreach.

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



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

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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 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.





## **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.





## **RECORD OF ACTION/APPROVAL**

### **Board Meeting Tuesday, June 7, 2022**

#### **TOPIC/ISSUE:**

Subgrantee Agreement Compliance- Schedule of Operations

#### **BACKGROUND:**

The Subgrantee Agreement calls for certain approvals by the Board.

g. Annually before July 1 of each state fiscal year, the Board shall adopt a schedule of operations for the upcoming state fiscal year. Such schedule of operations shall include, but is not limited to, daily hours of operation of one- stop operators, and a holiday closure schedule which adopts either the federal, state, or appropriate county holiday schedule. If the Board has a career center that is affiliated with a college or university, the college or university schedule may be adopted for those centers. The proposed schedule must be approved by the Board and posted on the Board's website in a conspicuous, easily-accessible manner. The Board must give prior approval to any deviations from the schedule, except in emergency or reasonably unforeseeable circumstances (e.g., an order of the President or Governor, total loss of facilities from a catastrophic natural or man-made disaster, etc.). If emergency circumstances exist which result or could foreseeably result in a shutdown, the Board shall ensure that DEO and the State Board are informed within 48 hours of such shutdown or potential shutdown

#### **POINTS OF CONSIDERATION:**

Requires the Board to set hours of operation and official dates of closure. Holiday schedule should be either federal, state or county schedule. Board can give prior approval to deviations to the schedule.

CLM has 10 holiday closures, the same number as the federal schedule, except that instead of Washington's Birthday and Columbus Day, CLM has the Friday after Thanksgiving and Christmas Eve.

In addition, CLM offices/centers close four (4) times per year for staff training. For hours of operation, CLM's normal hours of operation are Monday through Friday, 8:00am until 5:00 pm.

**STAFF RECOMMENDATIONS:**

Adopt the Federal Holiday Schedule, with the following deviation: substitute the Friday after Thanksgiving and Christmas Eve for Washington's Birthday and Columbus Day, Christmas Day will be observed on Monday, December 26, 2022.

Approve CEO designating up to four (4) staff training days per year, providing the Board and DEO at least two weeks advanced notice with the notice posted on each office and on the website and through social media.

Approve the normal hours of operation to be Monday through Friday 8:00 am through 5:00 pm.

**BOARD ACTION:**



## **CAREERSOURCE HOLIDAY SCHEDULE 2022-2023**

CareerSource annually grants employees payment for each of the following eleven (11) holidays as though they were assigned workdays:

July 4<sup>th</sup> (Monday)  
Labor Day (first Monday in September)  
Veterans Day (November 11)  
Thanksgiving Day (4th Thursday in November)  
Friday after Thanksgiving Day  
December 24<sup>th</sup> (falls on Saturday, to be observed on Friday, December 23)  
December 25<sup>th</sup> (falls on Sunday to be observed on Monday, December 26)  
New Year's Day (Falls on Sunday to be observed on Monday January 2<sup>nd</sup>.)  
Martin Luther King Jr.'s Birthday (3rd Monday in January)  
Memorial Day (Last Monday in May)  
One Personal Floating Day per fiscal year. (Must be used before June 30.)

The date of observance of each of the above holidays will be determined annually and communicated to all employees in December of the preceding year.



## **RECORD OF ACTION/APPROVAL**

**Board Meeting - Tuesday, June 7, 2022**  
**Executive Meeting - Wednesday, June 1, 2022**

### **TOPIC/ISSUE:**

Draft 2022 Budget

### **BACKGROUND:**

### **POINTS OF CONSIDERATION:**

This budget is based on the following:

- Estimated carry forward funds from current year grants.
- Estimated funds for RESEA, Disabled Veterans and Supplemental Nutrition Assistance grants.

### **STAFF RECOMMENDATIONS:**

Approve draft 2022 Budget

### **COMMITTEE ACTION:**

Al Jones made a motion to approve the draft 2022-2023 budget. Pete Beasley seconded the motion. Motion carried.

### **BOARD ACTION:**



BUDGET - CSCLM																				
PY 2022(JULY 2022 - JUNE 2023)																				
6/1/2022	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
	ADULT	YOUTH	TAA	DISL WORKER	LVER	Re-Entry Nav	YTH BUILD 4	VOC REHAB	WAGNER PEYSER	VETERAN DVOP	WTP	SNAP	RECOVERY NAVIGATOR	YOUTH BUILD 3	RAPID RESPONSE	RWB 6	REA	UN- RESTR	TOTAL	
ITA requirement: 35%																				
REVENUE																				
P.Y. 2022 CONTRACTS	1,208,208	1,150,624	8,799	586,007	-	-	844,712	53,000	117,879	22,668	1,762,874	247,859	-	-	-	4,886	98,286	-	6,105,802	
CARRYFORWARD	248,293	50,998	-	149,408	9,259	134,775	-	-	74,180	803	84,000	-	97,182	241,283	38,842	-	19,899	336,713	1,485,635	
INCENTIVES/SUPPLEMENTAL	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
TRANSFER	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
TOTAL REVENUE	1,456,501	1,201,622	8,799	735,415	9,259	134,775	844,712	53,000	192,059	23,471	1,846,874	247,859	97,182	241,283	38,842	4,886	118,185	336,713	7,591,437	
EXPENDITURES																				
TOTAL ITA	41.10%																			
TRAINING:																				
ITA %	43%			37%																
ITA/TRAINING	200,000	-	-	23,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	223,000	
OJT	35,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	35,000	
EMPLOYED WORKER	35,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	35,000	
INTERNSHIPS	35,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	35,000	
TRAINING SUPPORT	10,000	-	-	2,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	12,000	
TRAINING STAFF	188,266	-	-	188,266	-	-	-	-	-	-	-	-	-	-	-	-	-	-	376,532	
TOTAL TRAINING	503,266	-	-	213,266	-	-	-	-	-	-	-	-	-	-	-	-	-	-	716,532	
OPERATING:																				
SUPPORTIVE SVS.	4,000	181,476	-	-	-	-	90,320	-	-	-	50,000	-	-	-	-	-	-	-	325,796	
DIRECT CHARGE (STAFF)	-	-	-	-	-	55,949	-	19,183	-	-	422,783	90,744	62,606	-	26,320	-	56,108	-	733,693	
ECKERD	15,000	584,524	-	30,000	-	-	88,883	-	-	-	-	-	-	27,658	-	-	-	-	746,065	
DEO STAFF TRAVEL	-	-	-	-	279	-	-	-	3,000	3,566	-	-	-	-	-	-	-	-	6,845	
OPERATING	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	32,180	32,180	
TOTAL OPERATING	19,000	766,000	-	30,000	279	55,949	179,203	19,183	3,000	3,566	472,783	90,744	62,606	27,658	26,320	-	56,108	32,180	1,844,579	
PROGRAM SUPPORT:																				
FACILITIES	22,803	48,734	8,144	22,803	8,144	8,144	16,288	2,867	81,441	16,288	55,640	14,725	8,144	8,144	8,144	4,886	8,144	-	343,486	
PROGRAM	95,921	-	-	49,513	51	-	32,913	3,523	22,325	655	232,598	16,666	-	-	-	-	1,496	-	455,661	
INFORMATION TECHNOLOGY	81,411	119,404	-	42,023	43	8,721	27,934	2,990	468	556	78,009	14,145	9,759	-	-	-	1,270	-	386,733	
OUTREACH	50,266	73,724	-	25,946	27	-	17,247	1,846	11,699	343	48,165	8,734	-	-	-	-	784	-	238,781	
BUSINESS	125,275	-	-	64,665	-	13,420	42,985	4,601	15,737	-	303,778	21,767	-	-	-	-	1,954	-	594,181	
SELF SERVICES	71,856	105,391	-	37,091	-	7,698	24,656	2,639	4,063	-	68,854	12,485	4,964	-	-	-	1,121	-	340,817	
CAREER SERVICES	146,046	-	-	75,387	-	15,645	50,112	5,364	18,346	-	354,146	25,376	-	-	-	-	2,277	-	692,699	
TOTAL PROGRAM SUPPORT	593,577	347,253	8,144	317,429	8,266	53,629	212,136	23,831	154,078	17,842	1,141,189	113,897	22,867	8,144	8,144	4,886	17,045	-	3,052,358	
TOTAL EXPENDITURES	1,115,843	1,113,253	8,144	560,695	8,545	109,578	391,339	43,014	157,078	21,408	1,613,972	204,641	85,473	35,802	34,464	4,886	73,153	32,180	5,613,469	
ADMIN POOL	112,936	30,154	467	53,905	509	10,935	21,498	4,323	12,681	1,472	166,044	20,517	8,342	412	3,121	-	7,322	3,426	457,272	
GENERAL POOL	45,298	12,095	187	21,621	204	4,386	8,623	1,734	5,086	591	66,600	8,230	3,346	165	1,252	-	2,937	1,374	183,411	
TOTAL INDIRECT COST RATE	158,234	42,249	655	75,526	714	15,321	30,121	6,057	17,767	2,063	232,644	28,747	11,689	578	4,373	-	10,258	4,801	640,683	
BALANCE	182,424	46,120	0	99,195	1	9,876	423,252	3,928	17,214	(0)	258	14,471	21	204,903	5	(0)	34,774	299,732	1,337,285	
INDIRECT RATE CALCULATION																				
DIRECT TOTAL COSTS	1,115,843	1,113,253	8,144	560,695	8,545	109,578	391,339	43,014	157,078	21,408	1,613,972	204,641	85,473	35,802	34,464	-	73,153	32,180	5,608,582	
LESS: LEASES	(40,146)	(64,044)	(3,757)	(24,420)	(3,762)	(6,876)	(10,223)	(2,411)	(37,979)	(7,580)	(54,481)	(11,940)	(7,120)	(4,271)	(5,149)	-	(4,387)	-	(296,000)	
SUBAWARD (ECKERDS)	(15,000)	(766,000)	-	(30,000)	-	-	-	-	-	-	-	-	-	-	(27,658)	-	-	-	(838,658)	
TOTAL MTDC	1,060,697	283,209	4,388	506,275	4,783	102,703	381,115	40,604	119,099	13,828	1,559,491	192,701	78,353	3,873	29,315	-	68,766	32,180	4,473,924	

Admin %

7.31%

IDCR %

14.32%



## **RECORD OF ACTION/APPROVAL**

### **Board Meeting Tuesday, June 7, 2022**

#### **TOPIC/ISSUE:**

Training Provider/Program Certification for PY 2022-2024

#### **BACKGROUND:**

Pursuant to CSCLM Local Policy - OPS-28 Area Targeted Occupational List and DEO State policy guidance #90, all training providers are required to recertify their eligibility to provide training services as well as provide performance information for the programs they wish to have included on our Area Targeted Occupation List (ATOL). Final certification must occur prior to June 30, 2022, in order for a school to be eligible to receive WIOA/WT funding for mutually participating customers for program year beginning July 1, 2022. Approval of training providers and programs is required by the board.

#### **POINTS OF CONSIDERATION:**

The attached spreadsheet is a compilation of the current training providers requiring recertification. Some providers have a future date of recertification based on the original application date. They have been included for approval of continued for the next program year. Programs have been recommended to be Approved, or Not Approved based on program performance requirements (OPS-28) and relation of the program to a targeted sector.

#### **STAFF RECOMMENDATIONS:**

Approve Targeted Occupation List per the approved programs and providers recommended on the attached list.

#### **COMMITTEE ACTION:**

#### **BOARD ACTION:**

## Section 1 - Providers and Programs Approval and Denials for ATOL

Institution	Approval	Program	Completion Rate %	Employment Rate %	Comments	Board Approval
ATA Career Education	Approved	Dental Assisting	100%	93%		
ATA Career Education	Approved	Pre-Licensure Practical Nursing	100%	73%	Meets performance with placement wages at or above LLSIL	
ATA Career Education	Approved	Medical Professional - Medical Coding	100%	100%	Does not meet minimum training threshold requirements	
ATA Career Education	Approved	Medical Assisting	100%	72%	Meets performance with placement wages at or above LLSIL	
ATA Career Education	Approved	Medical Professional - Medical Assisting	100%	100%	Does not meet minimum training threshold requirements	
ATA Career Education	Approved	Limited Medical Radiography with Medical Assisting	100%	67%	Meets performance with placement wages at or above LLSIL	
ATA Career Education	Not Approved	Professional Coding	100%	25%	Does not meet minimum employment threshold requirements	
College of Central Florida	Approved	AS Engineering Technology - Advanced Manufacturing	new- no data	new- no data	New Program- Recommend Approval due to Targeted Sector	
College of Central Florida	Approved	AS Engineering Technology - Quality	new- no data	new- no data	New Program- Recommend Approval due to Targeted Sector	
College of Central Florida	Approved	AS Engineering Technology - Electronics	new- no data	new- no data	New Program- Recommend Approval due to Targeted Sector	
College of Central Florida	Approved	AS Supply Chain Management	new- no data	new- no data	New Program- Recommend Approval due to Targeted Sector	
College of Central Florida	Approved	CCC Emergency Medical Technician	100%	90%		
College of Central Florida	Approved	CCC Emergency Medical Services - Paramedic	100%	95%		
College of Central Florida	Approved	Registered Nursing	100%	90%		
College of Central Florida	Approved	Adobe Certified Professional (Vouchers Included)	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Adobe Certified Professional in Visual Design (Vouchers Included)	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Adobe Certified Professional in Web Design (Vouchers Included)	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Certified Bookkeeper	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Certified Clinical Medical Assistant (CCMA) (Voucher Included)	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Certified Digital Marketing Fundamental (Voucher Included)	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Certified Electronic Health Records Specialist (CEHRS)	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Certified Information Security Manager (CISM)	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Certified Information Systems Security Professional (CISSP)	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Certified Medical Administrative Assistant (CMAA)	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Certified Medical Administrative Assistant with Billing and Coding	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Certified Six Sigma Green Belt	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Certified Supply Chain Professional	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Certified Supply Chain Professional + Freight Broker/Agent Training	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Cisco CCNA Certification Training	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	CompTIA Advanced Security Practitioner (CASP)	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	CompTIA Certification Training: A+, Network+, Security+	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	CompTIA Project+	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	FANUC FAST HandlingTool	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	FANUC FAST 2D iRVision	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Human Resource Professional	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	HVAC/R Certified Technician	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Lean Six Sigma Black Belt with 1-on-1 Project Coaching	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Medical Billing and Coding	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Microsoft Office Specialist 2016 Certification Training	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Approved	Systems Security Certified Practitioner (SSCP)	N/A	N/A	Non Credit - performance not tracked through FETPIP	
College of Central Florida	Not Approved	Insurance License - 2-20 General Lines Agent	N/A	N/A	Not linked to targeted occupations	
College of Central Florida	Not Approved	Insurance License - 4-40 (RCSR)	N/A	N/A	Not linked to targeted occupations	
College of Central Florida	Not Approved	Real Estate Broker Pre-License	N/A	N/A	Not linked to targeted occupations	
College of Central Florida	Not Approved	Real Estate Pre-License	N/A	N/A	Not linked to targeted occupations	
Life-Line Institute Ocala	Approved	Clinical Medical Assistant	100%	100%		
Life-Line Institute Ocala	Approved	Home Health Aide	100%	100%		
Life-Line Institute Ocala	Approved	Phlebotomist	100%	100%		
Marion Technical College	Approved	Certified Nursing Assistant	94%	94%		
Marion Technical College	Approved	Commercial Vehicle Driving	91%	97%		
Marion Technical College	Approved	Emergency Medical Technician	100%	100%		
Marion Technical College	Approved	Firefighter 1 & 2	97%	90%		
Marion Technical College	Approved	Firefighter/EMT Combined	94%	97%		
Marion Technical College	Approved	Medical Assisting	96%	92%		
Marion Technical College	Approved	Phlebotomy	93%	93%		
Marion Technical College	Approved	Practical Nursing	95%	92%		
Marion Technical College	Approved	Radiologic Technology	100%	100%		
Marion Technical College	Approved	Welding Technology	96%	98%		
Marion Technical College	Approved	Fundamental Food Service Skills	New- No Data	New- No Data	New Program- Recommend Approval due to Targeted Sector	
Marion Technical College	Approved	Computer Systems and Information Technology	New- No Data	New- No Data	New Program- Recommend Approval due to Targeted Sector	
Interstate Commercial Driving	Approved	Commercial Truck Driving			Continued Eligibility - Reapplication due March 2024	

3/9/2024

Metropolitan Technical Career Institute	Awaiting Submission	Phlebotomy	No Data	No Data		
Metropolitan Technical Career Institute	Awaiting Submission	Patient Care Tech	No Data	No Data		
Metropolitan Technical Career Institute	Awaiting Submission	Medical Assistant	No Data	No Data		
Metropolitan Technical Career Institute	Awaiting Submission	Laboratory Tech Online	No Data	No Data		
Metropolitan Technical Career Institute	Awaiting Submission	EKG Technician Online	No Data	No Data	Suspended until 09/2022 pending performance data submission	
Metropolitan Technical Career Institute	Awaiting Submission	Basic X-ray Online	No Data	No Data		
Metropolitan Technical Career Institute	Awaiting Submission	Medical Secretary Online	No Data	No Data		
Metropolitan Technical Career Institute	Awaiting Submission	Pharmacy Technician	No Data	No Data		
Metropolitan Technical Career Institute	Awaiting Submission	Veterinarian Technician	No Data	No Data		
National Training	Approved	Commercial Truck Driving			Continued Eligibility - Reapplication due March 2024	3/9/2024
National Training	Approved	Heavy Equipment Operation			Continued Eligibility - Reapplication due March 2024	3/9/2024
New Horizons - Gulf Coast Only	Awaiting Submission	Comptia A+				9/9/2020
New Horizons - Gulf Coast Only	Awaiting Submission	Comptia Network				9/9/2020
New Horizons - Gulf Coast Only	Awaiting Submission	Comptia Security				9/9/2020
New Horizons - Gulf Coast Only	Awaiting Submission	Cisco CCNA				9/9/2020
New Horizons - Gulf Coast Only	Awaiting Submission	Cisco CCNA Security	Submitted FETPIP Report		Provider submitted copy of FETPIP report confirming meeting certification	9/9/2020
New Horizons - Gulf Coast Only	Awaiting Submission	Cisco CISSP	Overall Placement Rate: 84.97%		standards for all programs through the Commission for Independent	9/9/2020
New Horizons - Gulf Coast Only	Awaiting Submission	Certified Ethical Hacker	Retention Rate: 95.33%		Education. <b>Reapplication due 09/2022</b>	9/9/2020
New Horizons - Gulf Coast Only	Awaiting Submission	Microsoft Certified Solutions Associate (MCSA)				9/9/2020
New Horizons - Gulf Coast Only	Awaiting Submission	Microsoft Technology Associate (MTA)				9/9/2020
New Horizons - Gulf Coast Only	Awaiting Submission	Project Management Professional (PMP)				9/9/2020
Rasmussen	Approved	Early Childhood Education - Associate's Degree	54.8%	23%		
Rasmussen	Approved	Early Childhood Education - Certificate	50.0%	17%		
Rasmussen	Approved	Early Childhood Education - Diploma	n/a	n/a		
Rasmussen	Approved	Health Information Technician - Associate's Degree	40.0%	28%		
Rasmussen	Approved	Health Sciences - Associate's Degree	n/a	n/a		
Rasmussen	Approved	Information Technology - Associate's Degree	n/a	n/a		
Rasmussen	Approved	Physical Therapy - Associate's Degree	0.0%	n/a	Data rates are lower than goal. However, this provider has always resulted in positive outcome locally.	
Rasmussen	Approved	Professional Nursing - Associate's Degree	50.3%	48%		
Rasmussen	Approved	Radiologic Technology - Associate's Degree	33.3%	14%		
Rasmussen	Approved	Software Application Development - Associate's Degree	18.2%	9%		
Rasmussen	Approved	Practical Nursing - Diploma	55.8%	49%		
Rasmussen	Not Approved	Criminal Justice - Associate's Degree	43.8%	6%	Not linked to targeted occupations	
Roadmaster Driving School	Approved	Commercial Truck Driver	89	88	Data rates are lower than goal. However, this provider has always resulted in positive outcome locally.	
STRAC Institute - Veterans Assembled Electronics	Awaiting Submission	Electronics assembly and soldering - IPC610,620,JSTD001,ESD, CCI, ESD	80	78		
Taylor College	Approved	Physical Therapist Assistant	100%	91%		9/9/2020
Taylor College	Approved	Professional Nursing	86%	75%	Meets performance with placement wages at or above LLSIL	9/9/2020
Taylor College	Approved	Practical Nursing	56%	48%	Meets performance with placement wages at or above LLSIL	9/9/2020
Taylor College	Approved	EKG Exam Prep	N/A	N/A	Test prep courses/non credit - do not report performance	9/9/2020
Taylor College	Approved	Nursing Assistant Prep Course	N/A	N/A	Test prep courses/non credit - do not report performance	9/9/2020
Taylor College	Approved	Phlebotomy Exam Prep	N/A	N/A	Test prep courses/non credit - do not report performance	9/9/2020
Taylor College	Approved	Patient Care Tech Exam Prep	N/A	N/A	Test prep courses/non credit - do not report performance	9/9/2020
Truck Driver Institute	Awaiting Submission	Commercial Truck Driving	85	73	Suspended until 09/2022 pending performance data submission	6/3/2020
Withlacoochee Technical College	Awaiting Submission	Applied Cybersecurity	100	100		6/3/2020
Withlacoochee Technical College	Awaiting Submission	Automotive Collision Technology	85	91		6/3/2020
Withlacoochee Technical College	Awaiting Submission	Correctional Officer	94	93		6/3/2020
Withlacoochee Technical College	Awaiting Submission	Crossover - Correctional Officer to LEO	100	100		6/3/2020
Withlacoochee Technical College	Awaiting Submission	Crossover - LEO to Correction Officer	100	100		6/3/2020
Withlacoochee Technical College	Awaiting Submission	Electricity	95	89		6/3/2020
Withlacoochee Technical College	Awaiting Submission	Heating, Ventilation, Air Conditioning, Refrigeration	83	84		6/3/2020
Withlacoochee Technical College	Awaiting Submission	Medical Administrative Specialist	86	92		6/3/2020
Withlacoochee Technical College	Awaiting Submission	Patient Care Assistant	100	100	Suspended until 09/2022 pending performance data submission	6/3/2020
Withlacoochee Technical College	Awaiting Submission	Practical Nursing	100	88		6/3/2020
Withlacoochee Technical College	Awaiting Submission	Professional Culinary Arts and Hospitality	93	92		6/3/2020
Withlacoochee Technical College	Awaiting Submission	Welding Technology	83	87		6/3/2020
Withlacoochee Technical College	Awaiting Submission	Florida Law Enforcement Academy	91	73		6/3/2020
Withlacoochee Technical College	Awaiting Submission	Massage Therapy	92	73		6/3/2020
Withlacoochee Technical College	Awaiting Submission	Network Systems Administration	88	71		6/3/2020
Withlacoochee Technical College	Awaiting Submission	Automotive Service Technology	100	67		6/3/2020
Withlacoochee Technical College	Awaiting Submission	Cosmetology	73	77		6/3/2020
Withlacoochee Technical College	Awaiting Submission	Technology Support Services	57	63		6/3/2020



## **RECORD OF ACTION/APPROVAL**

**Board Meeting - Tuesday, June 7, 2022**  
**Nominating Committee - Wednesday, May 4, 2022**

### **TOPIC/ISSUE:**

Affirmation of Chair – Brandon Whiteman  
Program years: July 2022 – June 2023 and July 2023 – June 2024

### **BACKGROUND:**

### **POINTS OF CONSIDERATION:**

### **STAFF RECOMMENDATIONS:**

### **COMMITTEE ACTION:**

John Murphy made a motion to affirm Brandon Whiteman as Chair for the 2022-2023 and 2023-2024 program years. Charles Harris seconded the motion. Motion Carried.

### **BOARD ACTION:**



## **RECORD OF ACTION/APPROVAL**

**Board Meeting - Tuesday, June 7, 2022**  
**Nominating Committee - Wednesday, May 4, 2022**

### **TOPIC/ISSUE:**

Nomination of Vice Chair

### **BACKGROUND:**

### **POINTS OF CONSIDERATION:**

### **STAFF RECOMMENDATIONS:**

### **COMMITTEE ACTION:**

John Murphy made a motion to accept Al Jones as the nominee for Vice-Chair for the 2022-2023 and 2023-2024 program years. Charles Harris seconded the motion. Motion carried.

### **BOARD ACTION:**





## **RECORD OF ACTION/APPROVAL**

**Board Meeting - Tuesday, June 7, 2022**  
**Nominating Committee - Wednesday, May 4, 2022**

### **TOPIC/ISSUE:**

Nomination of Treasurer

### **BACKGROUND:**

### **POINTS OF CONSIDERATION:**

### **STAFF RECOMMENDATIONS:**

### **COMMITTEE ACTION:**

Charles Harris made a motion to accept the nomination of the Fred Morgan as the Treasurer. John Murphy seconded the motion. Motion carried.

### **BOARD ACTION:**



## **RECORD OF ACTION/APPROVAL**

**Board Meeting - Tuesday, June 7, 2022**  
**CEO Review Committee - Wednesday, May 11, 2022**

### **TOPIC/ISSUE:**

Discussion and recommendation for renewal of CEO contract for 2022 – 2023

### **BACKGROUND:**

CEO Salary History		
Year	Salary	Increase
2016 - 17	\$ 120,000.19	3%
2017 - 18	\$ 123,600.26	3%
2018 - 19	\$ 127,308.00	3%
2019 - 20	\$133,036.86	4.5 %
2020 - 21	\$137,027.97	3%
2021 - 22	\$137,027.97	0%

### **POINTS OF CONSIDERATION:**

### **STAFF RECOMMENDATIONS:**

### **COMMITTEE ACTION:**

Brandon Whiteman made a motion to approve Rusty Skinner's contract beginning on July 1, 2022 with the same terms in the contract that were granted last year, leaving compensation items as is. Kim Baxley seconded the motion. Motion carried.

### **BOARD ACTION:**

## **EMPLOYMENT CONTRACT**

This employment contract (hereinafter "Contract") is entered into the \_\_\_\_\_ day of \_\_\_\_\_, 2022, by and between the CITRUS LEVY MARION REGIONAL WORKFORCE DEVELOPMENT BOARD, INC., a private, not for profit corporation within the State of Florida (hereinafter referred to as "CLMRWDB"), and THOMAS EDWARD SKINNER, JR. (hereinafter referred to as "SKINNER"), to serve as Chief Executive Officer.

1. Employment. CLMRWDB hereby employs SKINNER as Chief Executive Officer of CLMRWDB, to present recommendations to CLMRWDB and to follow its direction and SKINNER hereby accepts said employment.

2. No Limitation on Duties. The above is intended to provide a general framework of professional requirements and not intended by either party to be a limiting description.

3. Compensation. CLMRWDB agrees to pay SKINNER a base salary of One Hundred Thirty Seven Thousand Twenty Eight Dollars (\$137,028.00) per year, effective July 1, 2022, payable in bi-weekly installments. CLMRWDB shall be responsible for paying the employer's share of FICA and Medicare taxes and shall withhold from SKINNER the employee contribution for the above as well as an amount for federal income tax. CLMRWDB shall make payment of the above taxes on SKINNER'S behalf to the appropriate agencies. CLMRWDB shall provide worker's compensation insurance and pay unemployment insurance coverage for SKINNER.

4. Benefits. CLMRWDB agrees to provide SKINNER benefits and working conditions in accordance with CLMRWDB Personnel Policies, except for the following:

- (a) Life Insurance. Provided SKINNER is able to qualify, CLMRWDB shall provide SKINNER with term life insurance in the amount of Two Hundred Fifty Thousand Dollars (\$250,000.00), with his wife, Susan M. Skinner, named as primary beneficiary and his children, Bridget May Scrogam and Ian Edward Skinner, named as equal alternate beneficiaries.
- (b) Leave. SKINNER shall be authorized personal leave in accordance with CLMRWDB personnel policies. Leave taken in excess of ten (10) consecutive business days (excluding holidays) must be approved by the Executive Committee. All other leave provisions shall be in accordance with CLMRWDB Personnel Policies.

5. Expenses. CLMRWDB shall reimburse SKINNER for such expenses as he incurs as part of his duties while out of town in accordance with per diem rates and travel policies established by CLMRWDB for its employees.

6. Effective Date and Duration. This Contract shall be effective July 1, 2022, and shall be in effect until midnight June 30, 2023.

7. Modifications and Amendments. This Contract may be modified or amended from time to time by a writing signed by both parties.

8. Termination and Severance Pay. The parties agree that this Contract may be terminated by either party by giving thirty (30) days written notice. In the event the Contract is terminated by CLMRWDB for any reason other than for misconduct (as the term “misconduct” is hereinafter defined), SKINNER shall receive as severance pay Fifty Two Thousand Seven Hundred Three Dollars (\$52,703.00). If SKINNER terminates this Contract, no severance pay shall be paid. The term “misconduct” as used herein: irrespective of whether the misconduct occurs at the workplace or during working hours, includes, but is not limited to, the following, which may not be construed in pari materia with each other:

- (a) Conduct demonstrating conscious disregard of CLMRWDB’s interests and found to be a deliberate violation or disregard of the reasonable standards of behavior which CLMRWDB expects of its employee.
- (b) Carelessness or negligence to a degree or recurrence that manifests culpability or wrongful intent, or shows an intentional and substantial disregard of CLMRWDB’s interests or of SKINNER’s duties and obligations to CLMRWDB.
- (c) Chronic absenteeism or tardiness in deliberate violation of a known policy of CLMRWDB or one or more unapproved absences following a written reprimand or warning relating to more than one unapproved absence.
- (d) A willful and deliberate violation of a standard or regulation of the State of Florida by SKINNER if, at any time, CLMRWDB is deemed to be an employer licensed or certified by the State of Florida, which violation would cause CLMRWDB to be sanctioned or have its license or certification suspended by the State of Florida.
- (d) Solicitation or acceptance of anything of value to SKINNER, including a gift, loan, reward, promise of future employment, favor, or service, based upon any understanding that official action or judgment of SKINNER would be influenced thereby.
- (e) Directly or indirectly purchasing, renting, or leasing any realty, goods, or services for CLMRWDB from any business entity of which SKINNER or SKINNER’s spouse or child is an officer, partner, director, or proprietor or in which such officer or employee or the officer’s or employee’s spouse or child, or any combination of them, has a material interest. Nor shall SKINNER acting in a private capacity, rent, lease, or sell any realty, goods, or services to CLMRWDB.
- (f) Accepting any compensation, payment, or thing of value when SKINNER knows, or, with the exercise of reasonable care, should know, that it was given to influence a vote or other action in which SKINNER was expected to participate in his official capacity.

- (g) Corruptly using or attempting to use SKINNER's official position or any property or resource which may be within his trust, or perform his official duties, to secure a special privilege, benefit, or exemption for himself or others.
- (h) Having or holding any employment or contractual relationship with any business entity or any agency which is doing business with CLMRWDB, nor shall SKINNER have or hold any employment or contractual relationship that will create a continuing or frequently recurring conflict between his private interests and the performance of his public duties or that would impede the full and faithful discharge of his public duties.
- (I) Disclosing or using information not available to members of the general public and gained by reason of SKINNER's official position, except for information relating exclusively to governmental practices, for SKINNER's personal gain or benefit or for the personal gain or benefit of any other person or business entity.
- (j) A violation of any of CLMRWDB's rules, unless SKINNER can demonstrate that:
  - 1. He did not know, and could not reasonably know, of the rule's requirements;
  - 2. The rule is not lawful or not reasonably related to the job environment and performance; or
  - 3. The rule is not fairly or consistently enforced.
- (k) A good faith determination by CLMRWDB that SKINNER has committed a material breach of any covenant, provision, term, condition, or undertaking contained in this Contract.
- (l) Commission by SKINNER of a felony or a crime involving moral turpitude.
- (m) Commission by SKINNER of any act which exposes CLMRWDB or any officer of CLMRWDB to any criminal liability for such act.
- (n) Any negligence or misconduct in the performance of SKINNER's duties that results in any detriment to CLMRWDB.

9. Outside Consulting. The parties recognize that SKINNER has special expertise in Workforce Development, which expertise is of value to the Workforce Development Community. The parties further understand that SKINNER's expertise is enhanced by exposure to problems encountered by others and by exposure to the problems encountered by allied and associated entities. Accordingly, subject to the requirements of Section 8 of this Agreement, the parties agree that SKINNER may accept consulting engagements from outside entities and accept compensation directly from the same. SKINNER agrees that such compensation shall not constitute salary and that he shall be solely responsible for making payment of all taxes on any income he receives as the result of consulting activities.

SKINNER agrees prior to accepting any consulting assignment he shall provide the CLMRWDB Executive Committee with a memorandum disclosing the entity seeking consulting services and with a description of the nature of the services to be provided and an estimate of the total time required to complete the engagement. If there is any objection from any Executive Committee member, SKINNER agrees to turn down the engagement. CLMRWDB shall not be liable for damages in the event of such an objection. SKINNER agrees he shall not provide consulting services to any entity which has a contract to provide services to CLMRWDB or which would otherwise constitute a conflict of interest under CLMRWDB's personnel policies. SKINNER further agrees that he shall take paid leave time for any consulting services provided during normal working hours (i.e., 8:00 a.m. to 5:00 p.m.) which services exceed one (1) hour in duration during normal working hours. SKINNER covenants and agrees that he shall not accept any consulting engagement which would interfere with his ability to successfully complete the duties assigned to him by the CLMRWDB Board.

10. Special Evaluation Criteria and Specific Goals. From time to time CLMRWDB may provide SKINNER with any special evaluation criteria or specific goals which CLMRWDB expects to be accomplished. CLMRWDB may consider SKINNER's performance in performing in accordance with such special evaluation criteria or in accomplishing such specific goals in evaluating his job performance.

11. Extension. This contract may be extended beyond the term indicated herein, under the same terms and conditions, by written agreement between the parties, provided that such an extension is for the purpose of finalizing future contractual terms. Such negotiations should begin no later than 60 days prior to the end of this Contract. The terms agreed upon during such an extension shall be retroactive to the date on which this contract was extended. This contract supersedes and cancels any extension agreement entered into by the parties prior to its effective date.

Dated:

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

Witnesses as to CLMRWDB:

\_\_\_\_\_  
\_\_\_\_\_

By: \_\_\_\_\_  
Kim Baxley  
Chair

Witnesses as to SKINNER:

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Thomas Edward Skinner, Jr.





## **RECORD OF ACTION/APPROVAL**

### **Board Meeting - Tuesday, June 7, 2022 Performance and Monitoring Committee - Tuesday, May 10, 2022**

#### **TOPIC/ISSUE:**

Department of Education Monitoring Report (Ticket to Work)

#### **BACKGROUND:**

We are annually monitored by the Department of Education (DOE) for purposes of maintaining in good standing for Ticket to Work program affiliation. We received the results of this monitoring on February 11, 2022 as conducted by DOE for the period of January 1, 2021 through November 30, 2021.

#### **POINTS OF CONSIDERATION:**

As shown in the report our risk rating is 20 and considered low. There were no issues reported for the period.

#### **STAFF RECOMMENDATIONS:**

Accept the monitoring report as issued by DOE on February 11, 2022.

#### **COMMITTEE ACTION:**

Fred Morgan made a motion to approve the DEO monitoring report. Arno Proctor seconded the motion. Motion carried

#### **BOARD ACTION:**



## **RECORD OF ACTION/APPROVAL**

### **Board Meeting - Tuesday, June 7, 2022 Performance and Monitoring Committee - Tuesday, May 10, 2022**

#### **TOPIC/ISSUE:**

Approve Powell & Jones as subrecipient monitor.

#### **BACKGROUND:**

Pursuant to the Workforce Innovation and Opportunity Act all local workforce development boards are required to procure a firm to conduct subrecipient monitoring of CareerSource CLM funding. Powell & Jones submitted a proposal for a new agreement. They were the only company submitting a proposal.

#### **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. They have done a good job in the monitoring and have been responsive to CSCLM requests. The contract will be in effect for UP TO five program years and will be negotiated annually.

#### **STAFF RECOMMENDATIONS:**

Requesting approval to contract with Powell & Jones as a Sole Source.

#### **COMMITTEE ACTION:**

Arno Proctor made a motion to approve a five-year contract with Powell and Jones as a sole source. Fred Morgan seconded the motion. Motion carried.

#### **BOARD ACTION:**



## **RECORD OF ACTION/APPROVAL**

**Board Meeting - Tuesday, June 7, 2022**  
**Career Center Meeting - Thursday, May 19, 2022**

### **TOPIC/ISSUE:**

Approval of Learning Alliance Corporation as an eligible training provider AND approval of training programs/apprenticeships.

### **BACKGROUND:**

All education entities that wish to be listed on CareerSource CLM's Area Targeted Occupation List (ATOL) must submit a Training Provider Application that includes performance data for each of the training programs they would like listed on the ATOL pursuant to CLM policy *OPS-28 Area Targeted Occupation List*. In accordance with 20 CFR ss 680.470, registered apprenticeship programs are given automatic approval status on local workforce development board's eligible provider training list.

### **POINTS OF CONSIDERATION:**

Learning Alliance Corporation has submitted the required documentation requesting the following apprenticeships.

Telecommunications Technician  
Cyber Security Technician  
Multimedia Producer  
Digital Marketer  
Database Technician  
Computer Support Specialist

### **STAFF RECOMMENDATIONS:**

Acknowledge automatic approval of Learning Alliance Corporation as an approved training provider in LWDB 10 and approve the following programs based on local need:

Telecommunications Technician  
Cyber Security Technician  
Multimedia Producer  
Digital Marketer  
Database Technician  
Computer Support Specialist

### **COMMITTEE ACTION:**

David Benthussen made a motion to approve Learning Alliance Corporation as a training provider and approved the six recommended programs. Jorge Martinez seconded the motion. Motion carried.

### **BOARD ACTION:**



## **RECORD OF ACTION/APPROVAL**

**Board Meeting - Tuesday, June 7, 2022**  
**Career Center Meeting - Thursday, May 19, 2022**

### **TOPIC/ISSUE:**

Approve CastleBranch as Level I Background Check contractor

### **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. An RFQ was sent out to bids. CastleBranch was the only submission.

### **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.
- Cost has been quoted at \$25.10 per background check.

### **STAFF RECOMMENDATIONS:**

Requesting approval of contract for CastleBranch to provide Level I background checks to support the PWE and PI programs.

### **COMMITTEE ACTION:**

David Benthussen made a motion to approve the sole source contract for Level 1 background checks. Jorge Martinez seconded the motion. Motion carried.

### **BOARD ACTION:**



## **RECORD OF ACTION/APPROVAL**

**Board Meeting - Tuesday, June 7, 2022**  
**Career Center Meeting - Thursday, May 19, 2022**

### **TOPIC/ISSUE:**

Job Search/Job Readiness (JSJR) – OPS 07

### **BACKGROUND:**

The job search/job readiness assistance activity is a core activity designed to assist Welfare Transition participants with seeking and finding employment to become self-sufficient.

JSJR is the activity that includes the act of seeking or obtaining employment, as well as learning how to seek employment. Preparing for employment is also part of this activity.

While we adhere to this practice in our Centers, we have not had a written policy and we feel the addition will enhance consistency in our workforce system.

### **POINTS OF CONSIDERATION:**

This policy to provide guidance to Welfare Transition Staff on policies and procedures for assigning and tracking participation in this activity following 45 CFR 261.60-62; 45 CFR 262; section 445.010 F.S. and Florida's Work Verification Plan.

### **STAFF RECOMMENDATIONS:**

Approve the Job Search/Job Readiness Policy (OPS-07), in accordance with Welfare Transition Program regulations.

### **COMMITTEE ACTION:**

David Benthussen made a motion to approve the Job Search/Job Readiness Policy (OPS-07). Lanny Mathis seconded the motion. Motion carried.

### **BOARD ACTION:**



## **RECORD OF ACTION/APPROVAL**

**Board Meeting - Tuesday, June 7, 2022**  
**Executive Meeting - Monday, May 16, 2022**

### **TOPIC/ISSUE:**

Annual benefits renewal.

### **BACKGROUND:**

The annual health insurance renewals are July 1, 2022. Renewal rates were received through Benefit Advisors.

Initially, Florida Blue presented renewal rates that average a 12% increase over last year. After some negotiating, they were able to bring the increase down to 4% over last year. United Health Care presented several options comparable to the plans offered by FL Blue. The United Health Care Plans presented a decrease in premiums for employee only and family plans between 19.4% and 32.86%. Compared to the renewal, the savings are closer to 20%. A spreadsheet detailing the comparison in plans is attached.

### **POINTS OF CONSIDERATION:**

Ancillary Benefits

- Company paid Principal Dental plan- rates decreased by 5.2% (\$89 per month / \$1,075 Annual decrease)
- Company paid Principal Group Life -rates remain the same
- Company paid Principal Short-Term disability rates -decreased by 5.8% (\$77 per month / \$926 annual decrease)
- Voluntary Life- rates remain the same
- Company paid Principal dependent Life - rates remain the same
- Principal Voluntary Vision plan -rates remain the same.

### **STAFF RECOMMENDATIONS:**

Our recommendation is that we contract with United Health Care Level Funded Plans (4) options listed below:

1. HE2000Rx10i8021 HSA – we recommend that the company offer \$360.00 one-time contribution to the HSA. The monthly company share of the premium plus the HSA contribution will be \$563.32. \$0.00 cost to the employee.
2. P5000i8021– Monthly rate of \$567.30 This plan will be used as the baseline employer contribution amount for the remaining plans. This plan will be offered at \$0.00 cost to the employee.



3. PROE100010i8021–We recommend the company pay the baseline amount of \$567.30. Monthly employee contribution will be \$115.63
4. E500i10021– We recommend the company pay the baseline amount of \$567.30. Monthly employee contribution \$188.12

All of the UHC plans have nationwide coverage, and no primary physician has to be assigned. With Florida Blue, there is a true HMO and PPO difference, and you have to provide a Primary's name with the HMO plans.

Also recommend continuing with all Principal plans as currently contracted – with the decrease changes as shown on the attached spreadsheet.

#### **COMMITTEE ACTION:**

Charles Harris made a motion to approve the proposed plan. Brandon Whiteman with ~~AA~~ Two Twelve Benefits, declared a conflict and abstained from the vote. Al Jones seconded the motion. Motion carried.

#### **BOARD ACTION:**



## **RECORD OF ACTION/APPROVAL**

**Board Meeting - Tuesday, June 7, 2022**  
**Executive Meeting - Wednesday, June 1, 2022**

### **TOPIC/ISSUE:**

Administrative Plan

### **BACKGROUND:**

An administrative plan is a vital component of operation for each Local Workforce Development Board (LWDB) providing the structure and format in which the LWDB will carry out its administrative functions.

### **POINTS OF CONSIDERATION:**

Our last Administrative Plan was revised in 2019. This revision was needed to update on job titles and minor changes in processes.

### **STAFF RECOMMENDATIONS:**

Approve the revised Administrative Plan as presented.

### **COMMITTEE ACTION:**

Al Jones made a motion to accept the updates to the Administrative Plan. Charles Harris seconded the motion. Motion carried.

### **BOARD ACTION:**



## **RECORD OF ACTION/APPROVAL**

**Board Meeting - Tuesday, June 7, 2022**  
**Executive Meeting - Wednesday, June 1, 2022**

### **TOPIC/ISSUE:**

YouthBuild grant award

### **BACKGROUND:**

We were notified on April 27, 2022 that our grant application for the next round of YouthBuild funding had been approved.

### **POINTS OF CONSIDERATION:**

This grant cycle includes funding for 48 participants and will result in the construction of four (4) homes through our partnership with Habitat for Humanity. The grant includes a four-month planning period, 24 months of performance and 12 months of follow-up. The official begin date of the grant is May 2, 2022. Funding in the amount of \$844,712.00 has been approved.

### **STAFF RECOMMENDATIONS:**

Accept funding in the amount of \$844,712.00.

### **COMMITTEE ACTION:**

Pete Beasley made a motion to accept the grant award. Al Jones seconded the motion. Motion carried.

### **BOARD ACTION:**



## **RECORD OF ACTION/APPROVAL**

**Board Meeting - Tuesday, June 7, 2022**  
**Executive Meeting - Wednesday, June 1, 2022**

### **TOPIC/ISSUE:**

Draft 2022 Budget

### **BACKGROUND:**

### **POINTS OF CONSIDERATION:**

This budget is based on the following:

- Estimated carry forward funds from current year grants.
- Estimated funds for RESEA, Disabled Veterans and Supplemental Nutrition Assistance grants.

### **STAFF RECOMMENDATIONS:**

Approve draft 2022 Budget

### **COMMITTEE ACTION:**

Al Jones made a motion to approve the draft 2022-2023 budget. Pete Beasley seconded the motion. Motion carried.

### **BOARD ACTION:**



## **RECORD OF ACTION/APPROVAL**

**Board Meeting - Tuesday, June 7, 2022**  
**Executive Meeting - Wednesday, June 1, 2022**

### **TOPIC/ISSUE:**

CLM Staff Increases

### **BACKGROUND:**

The last Cost of Living Adjustment (COLA) provided to staff was approved at the June 3, 2020, board meeting. This increase was a 3% increase for all staff. Staff increases in previous years have been considered, but not acted upon due to rising costs of healthcare benefits. These additional costs were absorbed by the organization in lieu of staff increases.

### **POINTS OF CONSIDERATION:**

1. We have changed healthcare providers for the upcoming program year and have realized significant cost savings to staff as well as the organization.
2. Cost of living expenses have raised exponentially the last several years.

### **STAFF RECOMMENDATIONS:**

Approve a 3% increase for all staff effective July 1, 2022, dependent on available funding in the finalized budget.

### **COMMITTEE ACTION:**

Charles Harris made a motion to approve the 3% cost of living increase for staff pay pending the final budget. Al Jones seconded the motion. Motion carried.

### **BOARD ACTION:**