



College of Central Florida  
Enterprise Center, Building 42  
3003 SW College Rd, Suite 206  
Ocala, FL 34474

**Executive Committee Meeting  
AGENDA**

**Wednesday, August 31, 2022 – 9:30 a.m.**

**Join Zoom Meeting:** <https://us02web.zoom.us/j/86185037537>

**Phone No: 1-646-558-8656 (EST) Meeting ID: 861 8503 7537**

Call to Order		B. Whiteman
Roll Call		C. Schnettler
Approval of Minutes, June 1, 2022	Pages 2 - 4	B. Whiteman

**DISCUSSION ITEMS**

State Update		R. Skinner
Workforce Issues that are Important to our Community		R. Skinner

**PUBLIC COMMENT**

**ACTION ITEMS**

2022 FWDA Summit Sponsorship	Page 5	R. Skinner
Rapid Response Policy	Pages 6 - 12	C. Galica
Collection of Demographic Data	Pages 13 - 15	C. Galica
Final Budget 2022-23	Pages 16 - 17	D. French
ITA Waiver Extension	Pages 18 - 22	D. French
NCBDC MOU Renewal	Pages 23 - 26	D. French

**PROJECT UPDATES**

House of Representatives Local Support Grant.		D. French
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**MATTERS FROM THE FLOOR**

**ADJOURNMENT**

2022 – 2023 MEETING SCHEDULE						
Performance/ Monitoring	Business and Economic Development	Career Center	Marketing/ Outreach	Executive	Full Board	
Tuesday, 9:00 am	Wednesday, 9:00 am	Thursday, 9:30 am	Wednesday, 9:00 am	Wednesday, 9:30 am	Wednesday, 11:30 am	
8/9/2022	8/10/2022	8/18/2022	8/17/2022	8/31/2022	9/7/2022	CF Levy
11/8/2022	11/9/2022	11/17/2022	11/16/2022	11/30/2022	12/7/2022	CF Ocala
2/7/2023	2/8/2023	2/16/2023	2/22/2023	3/1/2023	3/8/2023	CF Lecanto
5/9/2023	5/10/2023	5/18/2023	5/24/2023	5/31/2023	6/7/2023	CF Ocala

**OUR 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.*



**CAREERSOURCE CITRUS LEVY MARION  
Executive Committee**

**MINUTES**

DATE: June 1, 2022  
PLACE: College of Central Florida, Enterprise Center  
TIME: 9:30 a.m.

**MEMBERS PRESENT**

Albert Jones  
Brandon Whiteman  
Charles Harris  
Fred Morgan  
Pete Beasley

**MEMBERS ABSENT**

Kimberly Baxley, Chair  
Ted Knight

**OTHER ATTENDEES**

Rusty Skinner, CSCLM  
Dale French, CSCLM  
Cathy Galica, CSCLM

Cira Schnettler, CSCLM  
Bob Stermer, Board Attorney  
Nithya Pramekumar, TPMA

**CALL TO ORDER**

The meeting was called to order by Brandon Whiteman, Vice Chair, at 9:32 a.m.

**ROLL CALL**

Cira Schnettler called roll and a quorum was declared present.

**APPROVAL OF MINUTES**

Charles Harris made a motion to approve the minutes from the May 16, 2022, meeting. Pete Beasley seconded the motion. Motion carried.

**DISCUSSION ITEMS**

**State/Local Update**

Rusty Skinner provided the following update:

- There have been no updates from the consultant reviewing advantages of realignment. Their draft report will be provided at the CareerSource Florida board meeting next week.

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

The committee did not have issues to discuss.

**Strategic Plan**

Rusty Skinner advised that the plan has been presented to all committees. If there are any final comments, please email Dale or Rusty before the board meeting.

### Monitoring Report

Rusty Skinner summarized the report. He noted that the monitors found three areas in financial disclosures and board governance that had other non-compliance issues (ONI).

- Board members not filing financial disclosures timely
- Board members not completing board orientation and annual training timely
- Board governing documents not disclosing the length of retention for minutes of actions taken by the Board

### Letter Grades

Rusty Skinner explained that the State has released the criteria and formula for issuing letter grades to the workforce boards. The report prompted several concerns. CLM leadership drafted a response outlining concerns and suggestions for standards in implementation.

### **PUBLIC COMMENT**

None

### **ACTION ITEMS**

#### Administrative Plan

Dale French stated that the plan has been updated with a few minor changes. Committee members did not have any questions. Al Jones made a motion to accept the updates to the Administrative Plan. Charles Harris seconded the motion. Motion carried.

#### Emergency Paid Sick Leave

Dale French declared that this item is being pulled from the action list. Rusty Skinner explained that this policy was introduced as part of the pandemic policy and Covid prevention response. Dale French stated that emergency sick leave has not been requested since February 2022. With the uptick in Covid cases across the area, it may be best to leave the policy in place and revisit in the Fall.

#### YouthBuild Grant Award

Dale French advised that YouthBuild grant funding has been approved for another 2-year rotation. Pete Beasley made a motion to accept the grant award. Al Jones seconded the motion. Motion carried.

#### 2022/2023 Budget

Dale French notified the members that attached is a draft budget and the final budget will be presented in September. There was a small decrease in funding from last year, which does not present any major concerns. The budget was managed well last year. Al Jones made a motion to approve the draft 2022-2023 budget. Pete Beasley seconded the motion. Motion carried.

#### Staff Increases

Dale French explained that cost savings will be occurring in insurance premiums due to the transition from moving from Florida Blue to United Healthcare. Pending the final budget, a 3% cost of living pay increase is feasible. 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.

**PROJECT UPDATES**

None

**MATTERS FROM THE FLOOR**

None

**ADJOURNMENT**

There being no further business, the meeting was adjourned at 10:02 a.m.

**APPROVED:** \_\_\_\_\_



## **RECORD OF ACTION/APPROVAL**

### **Executive Committee Meeting August 31, 2022**

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

2022 Workforce Professional Development Summit

#### **BACKGROUND:**

FWDA has sponsored the Summit for over 10 years. The Summit is funded through registration fees and sponsorships. Traditionally CLM has sent staff and been a sponsor at the \$5,000 level.

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

CLM support will enhance the quality of the Summit

#### **STAFF RECOMMENDATIONS:**

Request approval of \$5,000 sponsorship from Unrestricted Funds.

#### **COMMITTEE ACTION:**

#### **BOARD ACTION:**



## **RECORD OF ACTION/APPROVAL**

### **Executive Committee Meeting August 31, 2022**

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

Rapid Response Program – OPS 08

#### **BACKGROUND:**

WIOA requires states to implement statewide Rapid Response activities to assist adversely affected employers and workers as quickly as possible following the announcement of a permanent closure, layoff, or natural or other disaster resulting in a mass job dislocation.

Rapid Response promotes economic recovery and vitality by developing ongoing, comprehensive approaches to identifying, planning for, or responding to layoffs and preventing or minimizing the impacts of layoffs on workers, businesses, and communities. Rapid reemployment is a central tenant of Rapid Response and is accomplished by helping affected workers quickly transition to reemployment, minimizing the duration of unemployment, or averting layoffs whenever possible.

An additional requirement for our 2022 Local Plan requires that we provide information of our policy/procedures for Rapid Response.

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

This policy will provide guidance to CareerSource Citrus Levy Marion staff on policies and procedures for the Rapid Response Program following CareerSource Florida Administrative Policy 114 and Public Law 113-128, Section 134(c)(2), 20 Code of Federal Regulations (CFR), Part 639, 20 Code of Federal Regulations (CFR), Part 682 and the Training and Employment Guidance Letter (TEGL) 19-62

#### **STAFF RECOMMENDATIONS:**

Approve the Rapid Response Program Policy in accordance with the Workforce Innovation and Opportunity Act.

#### **COMMITTEE ACTION:**

#### **BOARD ACTION:**



**POLICIES AND PROCEDURES**

<b>SECTION:</b> Program Operations	<b>POLICY #:</b> OPS – 08	<b>PAGE</b> 01 of 06
<b>TITLE:</b> Rapid Response	<b>EFFECTIVE DATE:</b> August 8, 2022	
<b>Dated:</b> August 8, 2022		

**DISTRIBUTION:** CareerSource Citrus Levy Marion Staff

**PURPOSE:** To provide CareerSource Citrus Levy Marion (CSCLM) Career Centers with Rapid Response process(es).

**BACKGROUND:** WIOA requires states to implement statewide Rapid Response activities to assist adversely affected employers and workers as quickly as possible following the announcement of a permanent closure, layoff, natural or other disaster resulting in a mass job dislocation.

Rapid Response promotes economic recovery and vitality by developing ongoing, comprehensive approaches to identifying, planning for, or responding to layoffs and preventing or minimizing the impacts of layoffs on workers, businesses, and communities. Rapid reemployment is a central tenant of Rapid Response and is accomplished by helping affected workers quickly transition to reemployment, minimizing the duration of unemployment, or averting layoffs whenever possible.

**I. POLICY**

Rapid Response provides customer-focused services to both dislocated workers and employers, ensuring immediate access to services for affected workers to expedite reentry into the workforce. WIOA legislation requires Rapid Response and early intervention assistance be provided to workers to avert or minimize the economic disruption of a mass job dislocation event.

The Department of Economic Opportunity (DEO) State Rapid Response Program Office is responsible for conducting statewide Rapid Response activities and overseeing Rapid Response activities conducted locally by CareerSource Citrus Levy Marion (CSCLM). State-level Rapid Response activities are managed by the State Rapid Response Coordinator.

The classification of a Rapid Response event is without regard to industry, size of the employer, number of workers potentially affected, or the time between notification and layoff date.

There are four (4) types of Rapid Response events:

1. Worker Adjustment and Retraining Notification (WARN) Event - Any employer that provides written notice of a mass layoff or closure with intent to meet the federal WARN requirements.

The WARN Act of 1988 requires employers, in certain circumstances, to provide advance notification of layoffs and plant closings in order to provide workers with enough time to seek other employment or retraining opportunities. Employers covered under the WARN Act submit WARN notices to the State Rapid Response Coordinator sixty (60) days in advance of plant closings and/or mass layoffs.

CSCLM may assist employers who meet the criteria set forth in the WARN Act of 1988 and required in 20 CFR Part 639, with filing WARN Notices by providing the procedures and instructions available in the *Employer's Guide to Advance Notice of Closings and Layoffs*. WARN filing assistance must be documented in the employer's Employ Florida (EF) service plan with employer service code E-47 (WARN Notice Assistance).

Upon receipt of a WARN notice, DEO will provide notification via e-mail to the CSCLM Rapid Response Coordinator. DEO will provide a copy of the WARN notice and any known separation details in a notification e-mail to CSCLM within two (2) business days of receipt. If a WARN notice is incomplete, DEO will provide the known details in the form of an advanced, partial layoff notification.

A summary of all WARN information is available from the DEO public website at [www.floridajobs.org](http://www.floridajobs.org). The State Rapid Response Program Office is responsible for updating the list and keeping it current.

The online WARN Summary Report includes:

- a) Company name and address;
- b) Total number of affected workers;
- c) The affected employer's industry;
- d) WARN notification date;
- e) Layoff dates; and
- f) A copy of the WARN notice.

DEO is responsible for inputting WARN information in EF within two (2) business days of receipt. CSCLM may enter non-WARN Rapid Response events by following the instructions provided in the *Virtual OneStop® VOS Sapphire Administration System User Guide*. The use of the WARN1234 numbering sequence for Rapid Response events is reserved for DEO use only.

2. Non-WARN Event - Any employer experiencing a mass layoff or closure, even if it is not subject to the federal WARN requirements.



To serve businesses that are not covered by the WARN Act or a TAA petition, CSCLM's Rapid Response Coordinator and Business Services Team will utilize local economic development resources, local Small Business Development Center network offices, and other resources and technology to identify potential Rapid Response events.

3. Trade Adjustment Assistance (TAA) Event - Any employer for which a TAA petition has been filed with the U.S. Department of Labor (USDOL).

The Trade Act of 1974 established the TAA Program to assist workers who have been laid off or whose jobs have been threatened because of foreign trade or competition (trade-affected workers). To establish eligibility, a group of two workers (or their representative) must file a petition with USDOL. Upon receipt of the petition, USDOL investigates to verify the role of foreign trade or competition in the workers' job losses, reduction in hours, or reduction in wages.

In accordance with WIOA, the filing of a TAA petition requires LWDBs to deliver Rapid Response services to the affected workers. TAA petitions filed with USDOL are provided to the State Rapid Response Coordinator by the USDOL Office of Trade Adjustment Assistance (OTAA). The State Rapid Response Program Office shall provide a copy of the TAA Petition and any known separation details in a notification e-mail to the LWDB responsible for the service area of the employer within two (2) business days of receipt.

4. Natural and Other Disasters - Any employer experiencing a mass layoff or closure due to natural or force major disasters.

The CSCLM Rapid Response Coordinator will respond to natural disasters and coordinate with the State Rapid Response Coordinator and other local government divisions and organizations to provide Rapid Response services to natural disaster-affected workers. Workers separated due to natural or force majeure disasters must be screened for the eligibility requirements included in the WIOA Dislocated Workers program, per WIOA § 3 (15)(C) stating "unemployed as a result of general economic conditions in the community in which the individual resides or because of natural disasters".

## **PROCEDURES**

1. Need for Rapid Response services is identified by CareerSource staff through the following sources:
  - a. State W.A.R.N. Notice
  - b. Employer call
  - c. Newspaper or media announcement
  - d. Word of mouth
  - e. Employees coming in for services
  - f. Economic Development Council
  - g. Other partners
2. Staff notifies the local Rapid Response team who then contacts the employer to discuss their needs and present several options for services. The following questionnaire is used to clarify those needs and arrange for the materials and staff needed.

3. Staff is recruited to assist with the Rapid Response. Generally, staff from the One Stop Centers will meet with the employees and the Business Services staff will meet with the employer to get necessary paperwork and make all the arrangements. The One Stop Staff is notified of the dates of the Rapid Response in order to be prepared at the resource center(s).
4. The Rapid Response coordinator works with the Business Service Staff to generate the handouts and PowerPoint presentation (if needed) for the event. Rapid Response Kits with informational materials are kept on hand for smaller needs.
5. A joint meeting (telephone or in-person) is held with the team members to go over what is needed at the Rapid Response event to discuss responsibilities.
6. The Rapid Response event is conducted, necessary forms are completed, and the Expeditious Form, once completed, will be sent to DEO.
7. The Rapid Response Coordinator collects all the information and disseminates it as appropriate.

Services that can be offered to Employers:

1. Packets for employees containing unemployment information, job search materials and social services contacts.
2. On-site presentation including UC information and One Stop staff.
3. On-site laptops for registration in Employ Florida (EF) and job search capabilities.
4. Binders with current openings relevant to job skills of those being laid off
5. Contact with other employers with current openings relative to the job skills of those being laid off and ask if they are open to candidates receiving referrals.
6. Promotion of workshops to aid in job search preparation.
7. If the entire facility is closing, a recruitment event.
8. Drop off materials if on-site presentation is not a viable option for employer.

## **REFERENCES**

[Public Law 113-128, Section 134\(c\)\(2\)](#)

[20 Code of Federal Regulations \(CFR\), Part 639](#)

[20 Code of Federal Regulations \(CFR\), Part 682](#)

[Training and Employment Guidance Letter \(TEGL\) 19-16](#)

**OFFICIAL SIGNATURE**

**Thomas E. Skinner, Jr.  
Chief Executive Officer**

**EVP Coord:**

CareerSource Citrus Levy Marion is an equal employer/program. Auxiliary aids and services are available upon request to individuals with disabilities and in Spanish. All voice telephone numbers on this website may be reached using TTY/TDD equipment via the Florida Relay System at 711. If you need accommodations, call 800-434-5627, ext. 7878 or email [accommodations@careersourceclm.com](mailto:accommodations@careersourceclm.com). Please make request at least three business days in advance. Additionally, program information may be made available in Spanish upon request. A proud partner of the American Job Center network.

## **RAPID RESPONSE Questionnaire for use by Business Development Staff**

When an employer calls or we receive a WARN notice

1. Are the employees already aware of this layoff?
2. How many people are being affected by this layoff?
3. What types of positions do the employees hold that are being laid off?
4. Of those being laid off how many are in professional level positions and how many in entry level positions?
5. What is the average length of employment of those being laid off?
6. When will this layoff take place?
7. Are you open to us coming out and talking to your staff about One Stop services and Unemployment?
8. What type of meeting area would you have available to accommodate us coming out to talk with your staff?
9. How much time will you allow for us to spend with your employees?
10. Do you need someone to interpret any portion of our presentation due to special language needs?
11. Is it okay for me to share with other employers that have similar employment opportunities to those being laid off?



## **RECORD OF ACTION/APPROVAL**

### **Executive Committee Meeting August 31, 2022**

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

Collection of Demographic Information

#### **BACKGROUND:**

Federal regulations required the collection, recording and maintenance of demographic information about an individual's race/ethnicity, gender, disability status for every applicant and registrant. All career Centers must comply with the nondiscrimination and equal opportunity provisions regarding Collection of Demographic Information.

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 will not supersede existing policies but will act as a guide to help staff understand the process by which demographic information is collected for every job seeker.

#### **STAFF RECOMMENDATIONS:**

Approve the Collection of Demographic Information Policy (OPS-86) in accordance with WIOA regulations.

#### **COMMITTEE ACTION:**

#### **BOARD ACTION:**



**POLICIES AND PROCEDURES**

<b>SECTION:</b> Program Operations	<b>POLICY #:</b> OPS-86	<b>PAGE</b> 01 of 02
<b>TITLE:</b> Collection of Demographic Information	<b>EFFECTIVE DATE:</b> 4/19/2022	
<b>Dated:</b> 4/19/2022		

**DISTRIBUTION:** CareerSource Citrus Levy Marion Staff

**PURPOSE:** To provide CareerSource Citrus Levy Marion (CSCLM) Career Centers with demographic information collection process(s).

**BACKGROUND:** Federal regulations require the collection, recording and maintenance of demographic information about an individual’s race/ethnicity, gender age and where know, disability status for every applicant and registrant. All Career Centers must comply with the nondiscrimination and equal opportunity provisions regarding Collection of Demographic Data.

**I. POLICY**

- I. The process by which demographic information is collected for every jobseeker is as follows:
  - a. All jobseekers are required to complete a basic registration within Employ Florida (EF), which includes a request for all required demographic information.
  - b. All jobseekers are required to sign into the VOS Greeter system, which requests required demographic information, each time they utilize services provided by a Career Center.

While the demographic information is requested, it is not a requirement to receive services.

- II. Members of the Leadership Team monitor nondiscrimination and equal opportunity compliance using EF standard reports on a quarterly basis.

## **REFERENCES**

- **Public Law 113-128, Workforce Innovation and Opportunity Act**
- **Section 29, Part 37 of the Code of Federal Regulations**
- **Section 188 of the Workforce Innovation and Opportunity Act**

## **OFFICIAL SIGNATURE**

**Thomas E. Skinner, Jr.**  
**Chief Executive Officer**

**EVP Coord:**

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**RECORD OF ACTION/APPROVAL**

**Executive Committee Meeting  
August 31, 2022**

**TOPIC/ISSUE:**

Updated 2022 Budget

**BACKGROUND:**

**POINTS OF CONSIDERATION:**

This budget is based on the following:

- Final carry forward funds from program year 2021.

**STAFF RECOMMENDATIONS:**

Approve updated 2022 Budget

**COMMITTEE ACTION:**

**BOARD ACTION:**



BUDGET - CSCLM																				
PY 2022(JULY 2022 - JUNE 2023)																				
8/31/2022																				
	ADULT	YOUTH	TAA	DISL. WORKER	LVER	RURAL	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
<b>ITA requirement: 35%</b>																				
<b>REVENUE</b>																				
P.Y. 2022 CONTRACTS	1,208,208	1,150,624	8,059	586,007	-	62,500	-	844,712	-	117,879	22,668	1,762,874	60,000	-	-	-	7,026	98,286	-	5,928,843
CARRYFORWARD	191,650	165,848	-	339,986	20,642	-	95,967	-	67,763	-	11,109	232,649	189,327	101,121	254,232	37,952	-	57,573	395,448	2,161,268
INCENTIVES/SUPPLEMENTAL TRANSFER	450,000	-	-	(450,000)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>TOTAL REVENUE</b>	<b>1,849,858</b>	<b>1,316,472</b>	<b>8,059</b>	<b>475,993</b>	<b>20,642</b>	<b>62,500</b>	<b>95,967</b>	<b>844,712</b>	<b>67,763</b>	<b>117,879</b>	<b>33,777</b>	<b>1,995,523</b>	<b>249,327</b>	<b>101,121</b>	<b>254,232</b>	<b>37,952</b>	<b>7,026</b>	<b>155,859</b>	<b>395,448</b>	<b>8,090,111</b>
<b>EXPENDITURES</b>																				
<b>TOTAL ITA</b>	<b>40.60%</b>																			
<b>TRAINING:</b>																				
ITA %	43%			25%																
ITA/TRAINING	100,000	-	3,595	23,000	-	24,768	-	-	-	-	-	-	-	-	-	-	-	-	-	151,363
OJT	80,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	80,000
EMPLOYED WORKER	70,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	70,000
INTERNSHIPS	55,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	55,000
TRAINING SUPPORT	10,000	-	-	2,000	-	1,000	-	-	-	-	-	-	-	-	-	-	-	-	-	13,000
TRAINING STAFF	338,879	-	-	37,653	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	376,532
<b>TOTAL TRAINING</b>	<b>653,879</b>	<b>-</b>	<b>3,595</b>	<b>62,653</b>	<b>-</b>	<b>25,768</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>745,895</b>
<b>OPERATING:</b>																				
SUPPORTIVE SVS.	4,000	181,476	-	-	-	-	-	90,320	-	-	-	82,280	-	-	-	-	-	-	-	358,076
DIRECT CHARGE (STAFF)	-	-	-	-	-	-	57,628	-	19,758	-	-	432,577	92,740	39,040	-	26,392	-	57,791	-	725,926
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
<b>TOTAL OPERATING</b>	<b>19,000</b>	<b>766,000</b>	<b>-</b>	<b>30,000</b>	<b>279</b>	<b>-</b>	<b>57,628</b>	<b>179,203</b>	<b>19,758</b>	<b>3,000</b>	<b>3,566</b>	<b>514,857</b>	<b>92,740</b>	<b>39,040</b>	<b>27,658</b>	<b>26,392</b>	<b>-</b>	<b>57,791</b>	<b>32,180</b>	<b>1,869,092</b>
<b>PROGRAM SUPPORT:</b>																				
FACILITIES	23,468	78,695	211	20,938	10,469	-	9,134	5,410	492	74,971	17,425	72,020	13,561	5,410	6,956	2,529	7,026	16,301	-	365,017
PROGRAM	124,758	-	-	18,455	52	4,778	-	33,226	3,663	11,241	661	242,610	17,195	7,238	-	4,284	-	3,022	-	471,182
INFORMATION TECHNOLOGY	94,937	108,076	-	17,303	39	3,636	8,131	25,284	2,788	-	423	76,544	13,085	5,508	-	-	-	2,300	-	358,558
OUTREACH	66,642	75,865	-	12,146	28	2,552	-	17,748	1,957	6,005	353	53,731	9,185	3,867	-	-	-	1,614	-	251,694
BUSINESS	149,508	-	-	27,250	-	5,725	-	39,817	4,390	667	-	290,740	20,606	8,674	-	-	-	3,622	-	550,999
SELF SERVICES	116,217	132,301	-	21,182	-	4,450	-	30,951	3,413	515	-	93,701	16,018	6,743	-	-	-	2,815	-	428,309
CAREER SERVICES	201,780	-	-	36,777	-	7,727	-	53,739	5,925	900	-	392,392	27,811	11,707	-	-	-	4,888	-	743,646
<b>TOTAL PROGRAM SUPPORT</b>	<b>777,310</b>	<b>394,937</b>	<b>211</b>	<b>154,051</b>	<b>10,588</b>	<b>28,868</b>	<b>17,265</b>	<b>206,176</b>	<b>22,627</b>	<b>94,724</b>	<b>18,943</b>	<b>1,221,738</b>	<b>117,460</b>	<b>49,148</b>	<b>6,956</b>	<b>6,813</b>	<b>7,026</b>	<b>34,564</b>	<b>-</b>	<b>3,169,405</b>
<b>TOTAL EXPENDITURES</b>	<b>1,450,189</b>	<b>1,160,937</b>	<b>3,806</b>	<b>246,704</b>	<b>10,867</b>	<b>54,635</b>	<b>74,893</b>	<b>385,379</b>	<b>42,385</b>	<b>97,724</b>	<b>22,509</b>	<b>1,736,595</b>	<b>210,200</b>	<b>88,188</b>	<b>34,614</b>	<b>33,205</b>	<b>7,026</b>	<b>92,355</b>	<b>32,180</b>	<b>5,784,391</b>
ADMIN POOL	155,263	35,728	415	22,654	714	5,695	7,843	21,934	4,596	7,317	1,677	187,480	22,291	9,365	387	3,437	-	9,438	3,604	499,836
GENERAL POOL	59,170	13,616	158	8,634	272	2,170	2,989	8,359	1,751	2,788	639	71,448	8,495	3,569	147	1,310	-	3,597	1,373	190,486
<b>TOTAL INDIRECT COST RATE</b>	<b>214,433</b>	<b>49,343</b>	<b>573</b>	<b>31,288</b>	<b>985</b>	<b>7,865</b>	<b>10,832</b>	<b>30,293</b>	<b>6,347</b>	<b>10,105</b>	<b>2,316</b>	<b>258,929</b>	<b>30,786</b>	<b>12,933</b>	<b>534</b>	<b>4,747</b>	<b>-</b>	<b>13,035</b>	<b>4,977</b>	<b>690,322</b>
<b>BALANCE</b>	<b>185,235</b>	<b>106,192</b>	<b>3,681</b>	<b>198,001</b>	<b>8,790</b>	<b>(0)</b>	<b>10,242</b>	<b>429,041</b>	<b>19,030</b>	<b>10,050</b>	<b>8,952</b>	<b>(0)</b>	<b>8,341</b>	<b>(0)</b>	<b>219,084</b>	<b>(0)</b>	<b>(0)</b>	<b>50,469</b>	<b>358,291</b>	<b>1,615,398</b>
<b>INDIRECT RATE CALCULATION</b>																				
<b>DIRECT TOTAL COSTS</b>	<b>1,450,189</b>	<b>1,160,937</b>	<b>3,806</b>	<b>246,704</b>	<b>10,867</b>	<b>54,635</b>	<b>74,893</b>	<b>385,379</b>	<b>42,385</b>	<b>97,724</b>	<b>22,509</b>	<b>1,736,595</b>	<b>210,200</b>	<b>88,188</b>	<b>34,614</b>	<b>33,205</b>	<b>-</b>	<b>92,355</b>	<b>32,180</b>	<b>5,777,364</b>
<b>LESS: LEASES</b>	<b>(48,702)</b>	<b>(75,890)</b>	<b>(103)</b>	<b>(14,401)</b>	<b>(4,495)</b>	<b>(3,782)</b>	<b>(4,853)</b>	<b>(10,308)</b>	<b>(1,345)</b>	<b>(32,386)</b>	<b>(7,536)</b>	<b>(62,407)</b>	<b>(11,142)</b>	<b>(4,562)</b>	<b>(3,504)</b>	<b>(2,514)</b>	<b>-</b>	<b>(8,070)</b>	<b>-</b>	<b>(296,000)</b>
<b>SUBAWARD (ECKERDS)</b>	<b>(15,000)</b>	<b>(766,000)</b>	<b>-</b>	<b>(30,000)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(179,203)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(27,658)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(1,017,861)</b>
<b>TOTAL MTDC</b>	<b>1,386,487</b>	<b>319,046</b>	<b>3,703</b>	<b>202,303</b>	<b>6,372</b>	<b>50,854</b>	<b>70,040</b>	<b>195,868</b>	<b>41,040</b>	<b>65,338</b>	<b>14,973</b>	<b>1,674,188</b>	<b>199,058</b>	<b>83,625</b>	<b>3,452</b>	<b>30,691</b>	<b>-</b>	<b>84,285</b>	<b>32,180</b>	<b>4,463,503</b>



## **RECORD OF ACTION/APPROVAL**

### **Executive Committee Meeting August 31, 2022**

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

50% ITA allocation waiver request

#### **BACKGROUND:**

Per section 445.003(3)(a)(1) of Florida statute requires that: “...50 percent of the Title I funds for Adults and Dislocated Workers which are passed through to local workforce development boards shall be allocated to and expended on Individual Training Accounts unless a local workforce development board obtains a waiver from CareerSource Florida, Inc.”

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

We are currently operating on a granted waiver that permits us to allocate 25% of our funds to customer ITAs (and qualifying cost categories). This waiver has allowed us to be more flexible in staffing patterns to react quickly to changing economic needs of the region. This waiver also permits us to use more funding to provide supportive services to the hardest to serve populations. On average, 35% of our funding is allocated to ITAs each year.

#### **STAFF RECOMMENDATIONS:**

Approve the submission of the 2022 ITA allocation waiver extension request.

#### **COMMITTEE ACTION:**

#### **BOARD ACTION:**



[careersourceclm.com](http://careersourceclm.com)

CareerSource Florida  
Tallahassee, FL 32317

CareerSource Florida Board of Directors:

In compliance with Section 445.003(3)(a)(1) Florida Statute, CareerSource Citrus Levy Marion is formally requesting a 25% waiver on the Individual Training Account Expenditure Requirement.

The attached request includes all necessary items as specified in Administrative Policy Number 074.

Please contact me with any questions.

Sincerely,

Thomas E. Skinner, Jr.  
Chief Executive Officer

## **Section 1: Local Training Needs and Business Focus**

Per CareerSource Administrative Policy 074, Individual Training Account (ITA) waiver requests must show a lack of demand for authorized training services. Several factors have led us to reevaluate our training strategies:

1. As in most areas in Florida, demand for training in Area 10 decreased drastically throughout the COVID-19 pandemic.
2. The decline in enrollments paired with increased funding allocated to state educational institutions for scholarship assistance has reduced demand for WIOA funded training.
3. Low unemployment rates and demand from businesses for recruitment assistance are straining human capital within our organization to maintain high levels of customer service.
4. Increased demand for experiential learning (OJT, Employed Worker and Paid Internship) require more staff contact to service both customers – the candidate and the business. Work-based training opportunities require more staff time to develop and tailor for each trainee.
5. Most candidates currently visiting the career centers are harder to serve with more barriers to employment. These individuals would be better served through comprehensive supportive services than training services.

The individuals currently seeking services within our career centers are among the hardest to serve with severe barriers to employment. Conventional training is not at the forefront when serving these customers. Other individualized services are required. These services include one-on-one counseling, workshops, resume development, and mock interviews. This need requires our ability to focus WIOA funding to where it is most advantageous to the current talent pool. At this time that focus is needed in career services, thus reducing our ability to focus on Individual Training Accounts (ITAs).

Recruitment of candidates for higher skilled positions poses a problem as many of the skilled workers do not necessarily need to visit a workforce office to find employment and remain in the 'virtual' talent pool. This, however, does not reduce the demand from the businesses seeking our services that rely on us to seek out, screen and pre-qualify applicants. We are increasing our efforts to locate this hidden talent and bring it into our offices where we can make connections with the businesses requesting our services. An increased focus on Business Services and talent sourcing, however, requires more staff hours that reduce our ability to meet ITA allocation requirements.

In addition to the challenges above we are increasing our focus on recruitment and talent pipeline development in the K-12 system and soon-to-be college seniors and graduates. These efforts require direct outreach and staff placement in classrooms.

In short, we continue to experience a need to focus on career service provision to balance the needs of both our customers – businesses and candidates.

## **Section 2: Local Impact of ITA Requirements**

Since the time of the 50% ITA requirement CareerSource Citrus Levy Marion has continued to see budget reductions. The total in budget reductions between 2012 and 2022 has been approximately 21% with 2022 budget reductions of 7% overall.

In 2011 CSCLM began anticipating ongoing budget reductions and performed a complete organizational restructuring. The elimination of the primary service provider, delivery of direct services and compression of management resulted in over \$400,000.00 in annual savings. These funds were made available for the addition of two mobile resource units and additional staff for heightened business and candidate services in the rural areas of counties.

It is worth noting that despite having operated on a 25% waiver since 2012 we have consistently maintained an ITA expenditure rate between 30% and 35%. The total expenditure for this program year continues to average 35%. However, the ability to maintain the waiver has given us the flexibility to remain nimble during economic shifts and special initiative launches to ensure we maintain a high level of service where needed. The 5% difference in requested waiver reduction will help offset our near 7% reduction in formula funding this program year.

Continued reduction in funding paired with the need for increased staff resources to respond to targeted sector partnerships (shift toward increased Business Services), increased demands for heightened screening and recruitment of talent, additional business requirements, a shift toward experiential training (made most successful through ability to provide support services), and increased program development with our education partners support the need for the requested waiver under which we may allocate and expend 25% of WIOA funding to ITA activities.

## Signature Page

### Request for Extension

LWDB: 10

LWDB Name: CareerSource Citrus Levy Marion

Contact: Thomas E. Skinner, Jr.

Contact Number: 352-873-7939 ext. 1204

The Local Workforce Development Board seeks to extend its existing 50% Training Requirement Waiver. The current waiver permits for an ITA expenditure rate of 25%. This waiver is to be effective for the period of July 1, 2022 through June 30, 2023.

The signatures below certify agreement to the request for the extension submitted by the Local Workforce Development Board and the assurance that the Local Workforce Development Board will operate in accordance with this extension, its Workforce Services Plan, and applicable federal and state laws and regulations. Additionally, CSCLM agrees to accept any conditional changes to a granted waiver should CareerSource Florida determine that conditions warrant such a change.

#### Chief Elected Official

#### Local Workforce Development Board Chair

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Signature

Carl Zalak

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Name (printed or typed)

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Consortium Chair

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Title

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Signature Date

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Signature

Brandon Whiteman

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Name (printed or typed)

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Board Chair

---

Title

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Signature Date



## **RECORD OF ACTION/APPROVAL**

### **Executive Committee Meeting August 31, 2022**

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

Memorandum of Understanding (MOU) with Nature Coast Business Development Council

#### **BACKGROUND:**

Last program year we entered into an MOU with the Nature Coast Business Development Council to maintain the Executive Director position as a CareerSource CLM employee. This was in an effort to provide a more competitive compensation package to hire the best talent. It also provides a direct linkage between workforce and economic development in Levy County and expands our reach in the business community.

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

The current MOU expires September 23, 2022. This position is currently budgeted in our 2022-2023 operational budget. This action will result in a modification to the original document contained in this packet.

#### **STAFF RECOMMENDATIONS:**

Extend the current MOU through June 30, 2023, with the same terms and conditions.

#### **COMMITTEE ACTION:**

#### **BOARD ACTION:**

**Agreement  
Between  
Nature Coast Business Development Council, Inc. (NCBDC)  
And  
CareerSource Citrus Levy Marion (CLM)**

This Agreement between the Nature Coast Business Development Council, Inc. (NCBDC) having an address of George Buckner, 11491 NW 50 Ave, Chiefland, FL 32626 and the Citrus Levy Marion Regional Workforce Development Board, Inc. DBA CareerSource Citrus Levy Marion (CLM) having an address of 3003 SW College Road, Suite 205, Ocala, FL 34474 is entered into effective the date set forth below.

**WITNESSETH**

**Whereas**, the Parties agree that each are mutually benefitted by the business relationship outlined in this agreement, and

**Whereas**, the Parties desire to work together to foster the economic and workforce development prospects in Levy County.

**Now therefore** it is agreed as follows:

1. **Recruitment and Selection.** CLM will actively recruit to fill the position of Executive Director, NCBDC, and provide interested candidates' information to the NCBDC for selection. NCBDC shall be responsible for selecting a candidate to fill the position.
2. **Employment and Compensation.** Upon selection and passage of a background check and drug screening, CLM will employ, on behalf of NCBDC, NCBDC's selection for Executive Director as a Program Manager (CLM title) at the rate agreed upon by NCBDC and the candidate, however, such rate shall lie within CLM Paygrade 109 (\$44,460-78,950 annually). The Executive Director (ED) will receive all benefits associated with employment by CLM.
3. **Duties of the Executive Director.** CLM will make the ED available to NCBDC to accomplish NCBDC's objectives, using initially using funds available through grant to CLM. This commitment is for the period of July 1, 2021 through September 30, 2022. After that period, NCBDC will be responsible for the funds necessary to retain the ED as a CLM employee. NCBDC will supervise the ED, assign work projects and tasks and evaluate the ED. CLM shall have no duty to supervise the ED but the ED shall be subject to CLM's personnel policies and code of conduct and shall be subject to discipline for any violation of the same.
4. **Additional Benefits.** NCBDC may, as it determines, provide other benefits to the ED and advise CLM of any such benefits to ensure that there is no overlap of benefits or duplication of costs. Such benefits may include use of an automobile and/or cell phone.



5. Facilities. CLM will either provide or arrange for the provision of office space and office equipment necessary for the ED to perform the duties and responsibilities of the NCBDC. If space is not in a CLM facility, NCBDC may be required to pay the cost of that space.
6. Grant Writing Assistance. CLM will assist the NCBDC in writing grants which promote the vision of the NCBDC or provide funding for the position of ED. Should such grants go directly to NCBDC, NCBDC agrees to reimburse CLM for any ED compensation provided by any such grant. If such grant(s) should be made to NCBDC through CLM, NCBDC agrees to allow CLM to recover any support costs or overhead included in the grant budget.
7. Additional Responsibilities of the ED. NCBDC and CLM recognize that there are projects which are not within any grant but that are potentially beneficial to both parties, and NCBDC agrees that, when approved by CLM and the NCBDC Board, such projects will be added to the ED's responsibilities. Examples of the foregoing include a Wage and Benefits Survey of Levy County employers and a Convening of Levy County businesses to discuss training needs and online training opportunities.
8. Fund-raising. NCBDC agrees that, with assistance from CLM and its ED, it will conduct an "investment campaign" designed to raise funds to stabilize the ED position funding and provide a reserve that can be used as cash match for any federal grant where such a match is required.
9. Promotion. CLM agrees that it will work with NCBDC to promote their partnership with local elected officials, business organizations and funding sources.
10. Referrals. NCBDC agrees that the ED will serve as a business outreach resource for CLM, referring prospective businesses to CLM's Business Development team for a follow-up contact.
11. Effective Date and Extension. This agreement is in effect beginning July 1, 2021 and ending midnight September 30, 2022. The agreement may be extended by the consent of both parties and the availability of grant or NCBDC revenues. Such an extension shall be in a form of an amendment to this agreement.
12. Termination. This Agreement may be terminated with or without cause by either party upon ten (10) days written notice to the other party.
13. No Assignment. This Agreement may not be assigned by either party without the prior written consent of the other party, which, because of the nature of the parties' respective obligations under this agreement, may be declined by such party for any reason or for no reason whatsoever.
14. Notices. Any notice or other communication required or permitted to be given under this Agreement must be in writing and will be deemed effective when delivered in person or sent by e-mail, facsimile, cable, telegram or telex, or by overnight courier or registered or certified mail, postage prepaid, return receipt requested, to the addresses set forth above.
15. Amendment. This Agreement may be amended, and the observance of any term may be waived (either prospectively or retroactively and either generally or in a particular instance) only by written amendment signed by authorized representatives of the parties to the agreement.

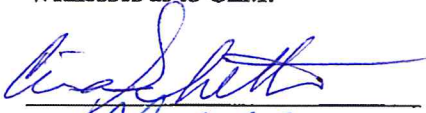

16. Choice of Law. This Agreement will be governed by and construed in accordance with the laws of the State of Florida without regard to doctrines of conflicts of laws.

17. No Third Party Beneficiaries. The only parties to this Agreement are CLM and NCBDC. There are no third party beneficiaries, including, but not limited to, the ED.

18. Entire Agreement. This Agreement constitutes the entire agreement between the parties and supersedes any and all prior oral or written understandings and agreements between the parties regarding the subject matter addressed in this Agreement.

6<sup>th</sup> IN WITNESS WHEREOF, the parties hereto have executed this Agreement on the day of October, 2021, and hereby agree to be bound by the terms and provisions set forth herein effective July 1, 2021.

Witnesses as to CLM:

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


Citrus Levy Marion Regional Workforce  
Development Board, Inc.

By:   
Its: Kim Baxley

Witnesses as to NCBDC:

  
\_\_\_\_\_  
Robert Kelling Treasurer

Nature Coast Business Development  
Council, Inc.

By:   
Its: GEORGE BUCKNER VICE CHAIRMAN