



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

**Consortium  
AGENDA**

**Wednesday, September 21, 2022 – 10:00 a.m.**

**Zoom Meeting:** <https://us02web.zoom.us/j/89166831224>  
**Phone 1-646-558-8656 Meeting ID: 891 6683 1224**

Call to Order C. Zalak  
Roll Call C. Schnettler  
Approval of Minutes, June 16, 2022 Pages 2 - 3 C. Zalak

**ACTION ITEMS**

2022/2023 Budget Pages 4 - 5 D. French  
One Stop Operator Pages 6 - 8 D. French  
Workforce Local Plan Modification Pages 9 - 10 D. French  
ITA Waiver Extension Page 11 D. French

**DISCUSSION ITEMS**

State Update R. Skinner  
    Realignment Checklist Pages 12 - 17  
    Scope of Work Pages 18 – 30  
    EY – CEO Interview Questions Page 31  
    Realignment Letter Page 32  
Workforce Issues Important to Our Community R. Skinner  
    Affordable Housing Page 33  
    K-12 Talent Pipeline  
    Wage Compression

**PUBLIC COMMENT**

**PROJECT UPDATES**

Board Meeting Agenda – 9/7/2022 Pages 34 - 35 R. Skinner

**MATTERS FROM THE FLOOR**

**ADJOURNMENT**

**OUR VISION STATEMENT**

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



**CAREERSOURCE CITRUS LEVY MARION  
Consortium**

**MINUTES**

DATE: June 16, 2022  
PLACE: College of Central Florida – Enterprise Center  
TIME: 2:00 p.m.

**MEMBERS PRESENT**

Commissioner Rooks  
Commissioner Zalak

**MEMBERS ABSENT**

Commissioner Schlabach

**OTHER ATTENDEES**

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

Robert Stermer, Attorney  
Cira Schnettler, CSCLM  
Kim Grey, Eckerd Connects

**CALL TO ORDER**

The meeting was called to order by Rusty Skinner, at 2:10 p.m.

**ROLL CALL**

Cira Schnettler called roll and a quorum was declared present.

**APPROVAL OF MINUTES**

Commissioner Rooks made a motion to approve the minutes from the March 16, 2022 meeting. Commissioner Zalak seconded the motion. Motion carried.

**ACTION ITEMS**

**Election of Consortium Chair**

Commissioner Rooks made a motion to accept Commissioner Zalak as Chair of the Consortium. Commissioner Zalak seconded the motion. Motion carried.

**2022/2023 Budget**

Rusty Skinner shared the attached draft budget would be finalized at the end of July after the carryforward funds and state funding is confirmed. The final budget will be brought back at the September Consortium meeting. Commissioner Zalak made a motion to approve the draft 2022/2023 budget. Commissioner Rooks seconded the motion. Motion carried.

**Board Member Appointment**

Commissioner Rooks made a motion to approve Ben Whitehouse as a board member

representing Marion County Public Schools. Commissioner Zalak seconded the motion. Motion carried.

MOU - NCBA

MOU – MTC

MTC Amendment

MOU – WTC

MOU – Blind Services

MOU – Mid Florida Community Services

MOU – Early Learning Coalition

MOU – Pinellas County Urban League

MOU – College of Central Florida

Dale French provided an overview of each agreement and explained that WIOA requires MOU's with specific community partners. Commissioner Rooks made a motion to approve all MOU's. Commissioner Zalak seconded the motion. Motion carried.

### **DISCUSSION ITEMS**

State Update / Letter Grades / Workforce Issues

Rusty Skinner explained that at the CareerSource Florida board meeting the State's consultant further discussed the realignment of the workforce boards. An assessment of the responses received from workforce directors, elected officials, community partners, and businesses was presented. The consultants plan to continue outreach efforts in the coming months. Commissioner Zalak stated that he would like to be involved throughout the progress of this matter.

Member Vacancies and Attendance

Members did not have comment or questions regarding the report.

### **PUBLIC COMMENT**

None

### **PROJECT UPDATES**

Board Member Agenda

The board agenda is available for the members to review and ask questions as needed.

### **MATTERS FROM THE FLOOR**

None

### **ADJOURNMENT**

There being no further business, the meeting was adjourned at 2:57 p.m.

**APPROVED:**

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## **RECORD OF ACTION/APPROVAL**

**Consortium Meeting, Wednesday, September 21, 2022**  
**Board Meeting, Wednesday, September 7, 2022**  
**Executive Committee Meeting, Wednesday, 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:**

Carl Flanagan made a motion to approve the final 2022-2023 budget. Jeff Chang seconded the motion. Motion carried.

### **BOARD ACTION:**

Al Jones made a motion to accept the 2022-2023 budget. Theresa Flick seconded the motion. Motion carried.

### **CONSORTIUM 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	503	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**

**Consortium Meeting, Wednesday, September 21, 2022**  
**Board Meeting, Wednesday, September 7, 2022**  
**Executive Committee Meeting, Wednesday, August 31, 2022**

### **TOPIC/ISSUE:**

One Stop Operator Contract

### **BACKGROUND:**

Thomas P. Miller & Associates (TPMA) is our currently contracted One Stop Operator. WIOA requires LWDB's to competitively procure One Stop Operators. TPMA has held the contract for One Stop Operator services since 2017. Our contract has always included two TPMA staff members.

Since January 2020 five staff members assigned to our contract have left or retired from TPMA. This has required us to orient new staff members mid-contract during the last two and a half years. This has hampered our ability to refine their roles and responsibilities as the Operator and effectively carry out the work detailed in their scope of work.

### **POINTS OF CONSIDERATION:**

We feel that the steady turnover of staff has significantly lessened the impact of the One Stop Operator role in our region. Annual monitoring conducted by our third-party monitor, Underwood Sloan & Associates, details the shortcomings of contractual performance. A copy of Underwood Sloan & Associates monitoring report is attached.

### **STAFF RECOMMENDATIONS:**

Terminate the current One Stop Operator contract and temporarily designate CSCLM as the One Stop Operator through April 28, 2023.

### **COMMITTEE ACTION:**

Carl Flanagan made a motion to approve the recommendation that the termination of the One Stop Operator contract be presented to the full board. Kim Baxley seconded the motion. Motion carried.

### **BOARD ACTION:**

Carl Flanagan made a motion to approve the termination of the One Stop Operator contract with TPMA and approve the request to DEO to maintain CLM as the One Stop Operator until June 2023. Pete Beasley seconded the motion. Motion carried.

### **CONSORTIUM ACTION:**



Adrienne Johnston  
Deputy Secretary, Workforce Services  
DEO  
107 East Madison Street  
Tallahassee, Florida 32399-4120

Michelle Dennard  
President and CEO  
CareerSource Florida  
PO Box 13179  
Tallahassee, FL 32317

September 21, 2022

Dear Ms. Johnston and Ms. Dennard:

We have found it necessary to terminate the contract of our One Stop Operator (OSO), effective October 21, 2022. This action comes reluctantly, however, necessary. Staff changes by the contractor have resulted in an inefficiency that resulted in our strategic plan being delayed for Board approval and other areas of their duties failing to be accomplished. As we started this fiscal year, they had been tasked with initiating certain goals within the plan. This plan was upended by the introduction of one new staff, unfamiliar with our region and then, the resignation of the one other staff member who had, in the past six months, begun to gain knowledge of our region.

As we move forward, we would appreciate your approval of the following:

- As the OSO duties are related to planning and technical assistance, we are seeking approval that these functions be accomplished, until a new contractor can be selected, by our staff.
- Due to the nature of the duties, and with our having retained an outside, third-party monitoring organization, we feel that the institution of firewalls other than those which already exist, is unnecessary and would appreciate your concurrence in this approach.
- Since we are submitting our Plan modification, we are asking that you accept the modification which includes the reference to Thomas P. Miller and Associates as our OSO, with this letter serving as a temporary amendment until such time as a new OSO is selected.

- We plan on selecting a new OSO as follows:
  - September 21- December 7, 2022- Staff will review the previous RFP, editing and revising the scope of work to prioritize coordination with our partners and the development of MOU and IFA during the first year of the contract, with technical assistance and process improvement being secondary and tertiary priorities.
  - December 8, 2022 – February 10, 2023- The RFP will be advertised, with a scheduled “bidders conference” to be held around mid-January 2023. Proposals will be due February 10, 2023.
  - February 10- March 31- staff will review proposals and rate responses for Executive Committee recommendations for the Board. Interviews will be scheduled before the Executive Committee makes a recommendation to the Board and Consortium. Approval of OSO by both Board and Consortium by March 31.
  - April 1-April 30- Staff and OSO will negotiate details of the contract deliverables and cost. Executive Committee approves contract.
  - June 1, 2023-June 30, 2023- staff and OSO hold initial meetings to discuss strategic plan and deliverables with information session(s).
  - July 1, 2023- OSO in place delivering technical assistance, process improvement and partner coordination services.

We appreciate your understanding and look forward to responding to any questions that you or your teams may have.

Sincerely,

Brandon Whiteman  
Chair  
CareerSource Citrus Levy Marion  
Board of Directors

Carl Zalak  
Chair  
Citrus Levy Marion Workforce  
Development Consortium

3003 SW College Road | Suite 205  
Ocala, Florida 34474  
p: 352-873-7939 | 800-434-5627







## **RECORD OF ACTION/APPROVAL**

**Consortium Meeting, Wednesday, September 21, 2022**  
**Board Meeting, Wednesday, September 7, 2022**  
**Executive Committee Meeting, Wednesday, August 31, 2022**

### **TOPIC/ISSUE:**

2020 Local Workforce Services plan approval

### **BACKGROUND:**

Local workforce development boards are required to submit a workforce services plan every four years. Our last plan was instituted in 2020 with a subsequent plan modification due by October 3, 2022. Plan modifications require local workforce boards to detail any updates or revisions to their full workforce services plans two years after publishing the original plan.

Once changes are approved the plan will be posted for public comment for a minimum of 14 days. A copy of the plan will be sent to all committee, board and consortium members for review and comment.

### **POINTS OF CONSIDERATION:**

The following items have been updated in the plan modification:

- Updated Consortium member roster
- Updated CLM Board of Directors roster
- Acquired grants since full plan development – YouthBuild 2021
- Additional customer outreach at community partners
  - New Directions
  - Brother's Keeper
  - Community Home Project
  - Lowell Correctional Facility
- Updated marketing plan to include a focus on:
  - Digital marketing
  - Podcasts
  - Live broadcasts on Facebook Live for monthly business showcases
- Cooperative agreement with Nature Coast Business Development Council
- Rapid Response funding and staffing plan
- Development and implementation of the new strategic plan

- Addition of ITA and OJT spending caps
- Recovery Navigator funding and staffing plan

**STAFF RECOMMENDATIONS:**

Approve the local plan updates and approve release for public comment on September 5, 2022

**COMMITTEE ACTION:**

Charles Harris made a motion to approve the local plan updates and release for public comment. Jeff Chang seconded the motion. Motion carried.

**BOARD ACTION:**

This item appeared before the Board of Directors as a consent agenda item. Kathy Judkins approved all consent agenda items from the Performance and Monitoring Committee, Career Center Committee, and Executive Committee. Mark Paugh seconded the motion. Motion carried.

**CONSORTIUM ACTION:**



## **RECORD OF ACTION/APPROVAL**

**Consortium Meeting, Wednesday, September 21, 2022**  
**Board Meeting, Wednesday, September 7, 2022**  
**Executive Committee Meeting, Wednesday, 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:**

Pete Beasley made a motion to approve submittal of the allocation waiver extension request. Charles Harris seconded the motion. Motion carried.

### **BOARD ACTION:**

This item appeared before the Board of Directors as a consent agenda item. Kathy Judkins approved all consent agenda items from the Performance and Monitoring Committee, Career Center Committee, and Executive Committee. Mark Paugh seconded the motion. Motion carried.

### **CONSORTIUM ACTION:**

## Local Area Re-designation Checklist for States July 22, 2021

**Background** – In general, WIOA allows the Governor to designate or re-designate local workforce development areas by continuing use of existing areas under WIA (initial and subsequent), for cause (fiscal, performance, or other substantial violations of WIOA), or by creating new local areas with local cooperation. This checklist assumes the third scenario, where the local governments in the existing local areas are engaged and cooperating with the State’s efforts to merge or divide the local areas. Since the State cannot compel local areas to merge as long as the local area meets criteria for subsequent designation, this checklist provides the required steps for voluntary re-designation and engagement strategies that ETA has observed to be helpful. The sequence proposed below may be helpful for planning purposes, however ETA acknowledges that the listed activities are not necessarily sequential. Please note that in instances where some local areas support re-designation and others do not, the State may consider whether it can attain its goals through the identification of planning regions that more closely adhere to regional economies.

**Phase I: Policy Review and Data Analysis** – The purpose of identifying local areas is to align workforce development activities and resources with larger regional economic development areas and available resources to provide coordinated and efficient services to both job seekers and employers<sup>1</sup>. When the Governor determines that the existing local areas in the State no longer best serve this purpose, the State may pursue voluntary re-designation proceedings. The first step is to review state policies and the available data to inform the re-designation plan.

**Phase II: Stakeholder Engagement** – The WIOA regulations define consultation as “the process by which State and/or local stakeholders convene to discuss changes to the public workforce system and constitutes a robust conversation in which all parties are given an opportunity to share their thoughts and opinions<sup>2</sup>.” The State should solicit local feedback and engagement early and throughout the life of the re-designation effort to increase cooperation and buy-in.

**Phase III: Implementation** – Once the State has analyzed the available data, drafted a local area re-designation plan, and gained the support of local stakeholders, the State may then proceed with the technical requirements for designating new local areas.

<sup>1</sup> 20 CFR 679.200

<sup>2</sup> 20 CFR 675.300

<b>Phase I: Policy Review and Data Analysis</b>				
<b>Activity</b>	<b>Required</b>	<b>Suggested</b>	<b>Status</b>	<b>Citation</b>
Review State policies for local area designation and appeals to ensure that they are WIOA compliant and current. This State policies must be reflected in the WIOA State Plan.		X		WIOA Section 106(b)(1) and 20 CFR 679.230 and 240
Stakeholders at the State level (State workforce development board, the state workforce agency, and staff to the Governor, etc.) must explore whether a given existing local area structure: <ul style="list-style-type: none"> <li>• Is consistent with local labor market areas;</li> <li>• Has a common economic development area; and</li> <li>• Has the Federal and non-Federal resources, including appropriate education and training institutions, to administer activities under WIOA subtitle B, such as K-12, community colleges, quality training providers, and the infrastructure to adequately support a local area).</li> </ul>	X			20 CFR 679.240
State stakeholders should consider: <ul style="list-style-type: none"> <li>• Commuting patterns;</li> <li>• Location quotients (or other industry cluster data); and</li> <li>• The costs and benefits of a potential reorganization including: <ul style="list-style-type: none"> <li>▪ Financial expenditures;</li> <li>▪ Potential cost savings and other efficiencies;</li> <li>▪ Relative administrative burden for maintaining current local area versus re-designating a new local area; and</li> <li>▪ The State/local relationship and/or local appetite for re-designation.</li> </ul> </li> </ul>		X		N/A
<b>Phase II: Stakeholder Engagement</b>				

Develop a draft plan or framework to facilitate local engagement.		X		N/A
Conduct meaningful outreach and consultation with the state board, local elected officials, and local board members (not just board staff).	X			WIOA Section 106(b)(1)(A) an 20 CFR 679.230
Solicit public comment from businesses, community-based organizations, training providers, economic development community, organized labor, and other key stakeholders.	X			20 CFR 679.230(c)
Conduct the re-designation effort in an open and transparent manner by: <ul style="list-style-type: none"> <li>• Conducting public meetings;</li> <li>• Promoting meetings to stakeholders;</li> <li>• Scheduling meetings that are convenient to stakeholders;</li> <li>• Ensuring that meeting facilities are physically accessible;</li> <li>• Providing virtual engagement options (Zoom calls, dedicated e-mail box, etc.);</li> <li>• Documenting the engagement process and the input received. The State should be able to demonstrate where and how it addressed local feedback.</li> </ul>		X		N/A
The State must inform any local areas in a region that wish to merge that funding is available to facilitate the transition process. These funds could be used for the following helpful activities: <ul style="list-style-type: none"> <li>• Convening sessions and conferences;</li> <li>• Renegotiation of contracts and agreements; and</li> <li>• Other activities associated with the re-designation as deemed appropriate by SWDB.</li> </ul>	X			20 CFR 679.280
Be prepared to outline how the proposed re-designation plan would impact local stakeholders (including existing local workforce development		X		N/A

boards and local elected officials) and address local concerns.				
Determine what may encourage local stakeholders to support merging (service efficiencies, cost savings, etc.) Here the State may find it helpful to run sample formula allocations under proposed new structure.		X		N/A
Determine what stakeholders have to lose (influence, contracts). How can the State assuage these concerns?		X		N/A
<b>Phase III: Implementation</b>				
Should it agree with a proposed merger of local areas, the SWDB must make its recommendation to re-designate the local areas to the Governor.	X			20 CFR 679.240(b)
The Governor may approve a request for re-designation at any time.	X			20 CFR 679.240(b)
If the Governor accepts the SWDB's recommendation, it must be reflected in the WIOA State Plan and otherwise communicated to the CEOs. Note: The requirements at 20 CFR 679.250-260 would not apply to the new local area.	X			20 CFR 679.230-240
Once the Governor has designated one or more new local areas, the State and local areas must transition WIOA administration to the new CEO/LWDB in an orderly fashion. Critical activities include: <ul style="list-style-type: none"> <li>• The local elected official(s) in the new local area must establish a CEO agreement in accordance with State policy to reflect the new governance structure and determine the chief local elected official.</li> <li>• The CEO is responsible for the following activities and may include them in the new agreement regarding shared authority (if any): <ul style="list-style-type: none"> <li>○ Update LWDB bylaws;</li> <li>○ Update LWDB member nomination process;</li> </ul> </li> </ul>	X			20 CFR 679.310(e) and (g), 320, and 360

<ul style="list-style-type: none"> <li>○ Update LWDB membership to reflect the transition with attention to ensuring that board composition is representative of the entire local area; and</li> <li>○ Ensure that any existing standing committees representative of the entire local area.</li> </ul>				
<p>The board of the newly established local area must develop a local workforce development plan that reflects the changes to its governance structure and submit the plan to the State<sup>3</sup>.</p>	X			20 CFR 679.550-560
<p>The local board must ensure that there is at least one comprehensive AJC in each local area. The local board should consider the needs of all participants in the local when deciding where to locate AJCs, including affiliates.</p>	X			20 CFR 662.110(c)
<p>The State must reflect governance changes (outlined in the WIOA State Plan ICR) in its WIOA State Plan. Depending on the timing of these changes, the State should include them in its 2022 State Plan, or a subsequent modification.</p>	X			20 CFR 676 Subpart A and WIOA State Plan ICR: <a href="https://www.dol.gov/sites/dolgov/files/ETA/wioa/pdfs/State-Plan-ICR.pdf">https://www.dol.gov/sites/dolgov/files/ETA/wioa/pdfs/State-Plan-ICR.pdf</a>
<p>The WIOA State Plan ICR requires the State to modify its plan to reflect the most up to date information regarding local area designation including the following:</p> <ul style="list-style-type: none"> <li>● Identify the regions and the local workforce development areas designated in the State.</li> <li>● Describe the process used for (re)designating local areas.</li> <li>● Describe the process used for identifying regions under section 106(a) of WIOA. This must include a description of how the State</li> </ul>	X			20 CFR 676 Subpart A and WIOA State Plan ICR: <a href="https://www.dol.gov/sites/dolgov/files/ETA/wioa/pdfs/State-">https://www.dol.gov/sites/dolgov/files/ETA/wioa/pdfs/State-</a>

3



consulted with the local boards and chief elected officials in identifying the regions.				<a href="#">Plan-ICR.pdf</a>
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## Scope of Work:

# REACH Act Alignment Phase 2 – Discovery, Research, and Option Development

Prepared for CareerSource Florida  
September 1<sup>st</sup>, 2022

# Phase 2 Scope of Work

The following includes our proposed approach to continue assisting CareerSource Florida, the REACH Act office, and other partners with identifying key dynamics of the state's workforce system and exploring options for greater alignment in keeping with the REACH Act and federal Department of Labor (DoL) requirements. Our proposed next phase of work will build from the findings of Phase 1 and will include broader stakeholder engagement and research and analysis of both quantitative and qualitative inputs. The findings resulting from these activities will be utilized to create a report including possible options for local workforce development board consolidation and alignment for the CareerSource Florida Board of Directors to consider.

EY anticipates that Phase 2 will begin on September 1<sup>st</sup>, 2022 and will be completed by February 28, 2023.

## 1. Project Management Workstream

EY will provide a set of kick-off materials and establish communication channels to ensure our teams are organized and to lay the foundation for the successful future alignment of Florida's workforce development system.

### 1.1 Project Set-up

EY will collaborate with CareerSource Florida and any other relevant stakeholder partners to conduct project set-up. Project set-up is inclusive of but not limited to a project kickoff meeting, a file sharing process, information requests, and a Project Management Plan and Guidebook.

#### a. Project Kick-Off Meeting

EY will schedule and facilitate a project kickoff meeting on September 6<sup>th</sup>, 2022. EY will prepare materials and will coordinate with CareerSource Florida to determine the attendee list for the kickoff meeting. This meeting will occur virtually.

#### b. Information Request (*work product*)

EY will provide CareerSource Florida with a detailed request for additional information not received during Phase 1 but helpful to the Phase 2 process.

#### c. Project Management Plan and Guidebook (*key deliverable*)

The Project Management Plan and Guidebook will include a high-level work plan, deliverable review and acceptance process and criteria, project schedule, team information and contacts, any additional information requests, an internal communications calendar, and other standard project management processes. The Project Management Plan and Guidebook will include a CareerSource Florida writing style guide agreed upon by both parties. EY will provide the Project Management Plan and Guidebook in addition to other relevant project set-up materials within one month of the contracted start date.

#### d. Stakeholder Engagement Playbook / Toolkit (*key deliverable*)

EY will provide guidance for identifying participants and organizing stakeholder engagement which will be outlined in a Stakeholder Engagement Playbook / Toolkit. The Stakeholder Engagement Playbook / Toolkit will list identified facilitation tools and potential technology as well as guidance for any other facilitation materials needed, as directed by CareerSource Florida. EY will use consistent tools for facilitating input from the identified stakeholders

including presentations, questions, and formats for documenting feedback so that input is consistently formatted and more easily aggregated across all stakeholder groups. EY will work closely with CareerSource Florida to identify the most efficient strategy for implementing the in-person stakeholder engagement portions of the scope of work. EY will dedicate a team of at least two EY consultants to each in-person meeting. CareerSource Florida will be responsible for identifying and providing contact information for meeting participants, securing meeting locations, AV equipment, meals and refreshments, and other meeting support logistics for in-person meetings.

- **Stakeholder Engagement Calendar**  
The Stakeholder Engagement Playbook / Toolkit will include a formal Stakeholder Engagement Calendar. The Stakeholder Engagement Calendar will outline the stakeholder engagement activities, including attendees and dates. The Stakeholder Engagement Calendar will be updated as necessary throughout the engagement.

## 1.2 Project Communications

### a. **Weekly Core Engagement Team Meetings**

EY will schedule formal check-in calls once a week with a core team of CareerSource Florida, REACH Act office and other designated representatives to provide status updates, plan for upcoming meetings, and track progress. EY will also provide ongoing communications via email and individual calls as needed for the project. Weekly Core Engagement Team meetings will begin the week following the project kickoff meeting.

### b. **Presentations to CareerSource Florida Board of Directors**

EY will present updates at the September CareerSource Florida Board of Directors meeting and the December CareerSource Florida Board of Directors meeting as directed by CareerSource Florida.

## 1.3 Ongoing Project Support Activities

EY will provide ongoing project support and consultation throughout the length of the engagement as directed by CareerSource Florida.

### a. **Monthly Progress Reports** (*key deliverables*)

EY will provide written status updates to CareerSource Florida and REACH Act office leadership at the end of each month, from September 2022 to February 2023, that highlight project status, activities to date, and upcoming activities. Monthly progress reports will be delivered to CareerSource Florida leadership as a PDF document via email.

### b. **Deliverable Expectation Documents**

EY will provide written Deliverable Expectation Documents for key deliverables prior to the drafting and execution of the deliverable. Each Deliverable Expectation Document will include a high-level description of the work product/deliverable, a draft table of contents for the report, a brief summary of the intended content, a list of review and approval expectations, deliverable acceptance criteria, and an expected schedule.

### c. **Stakeholder Identification**

CareerSource Florida is responsible for identifying stakeholders of its choice to participate in stakeholder input sessions, as well as providing their contact information. EY will provide guidance on the types of organizations and individuals to include.

**d. Facilitation and Logistics Set-up and Advising**

EY will collaborate with CareerSource Florida to facilitate project management activities and assist with overall engagement and project logistics and set-up. The project team will establish a timeline for stakeholder engagement to take place across the state and will provide guidance on meeting logistics. CareerSource Florida will be responsible for identifying and securing meeting locations, AV, meals and refreshments, and other meeting support logistics for in-person meetings.

**2. Background Research and Analysis**

EY will conduct research and analysis to provide a quantitative basis for option development and to support and inform qualitative inputs. The research components will include statewide data collection and analysis related to Workforce Innovation and Opportunity (WIOA) Act and REACH Act requirements, as well as cataloguing and identification of current operational and organizational features of the local workforce development boards.

**2.1 Statewide Data Collection and Analysis**

This research will include review and analysis of pertinent data, including information related to WIOA requirements; goals included within the REACH Act related to local workforce development board consolidation; the Florida Department of Economic Opportunity Local Workforce Development Area Designation Analysis and Organizational Boundary Scenarios report; and the Florida Department of Education’s Adult Education Delivery System Evaluation. The table below details these areas of focus.

Factors	Mandated	Legislation
Consistent with local labor market areas*	Yes	WIOA
Common economic development area*	Yes	WIOA
Appropriate education and training institutions to administer activities under WIOA subtitle B*	Yes	WIOA
Population centers	No	WIOA
Commuting patterns	No	WIOA
Land ownership	No	WIOA
Industrial composition	No	WIOA
Location quotients	No	WIOA
Labor force conditions	No	WIOA
Geographic boundaries	No	WIOA
Metropolitan Statistical Areas (MSAs)	N/A	Requested by CareerSource Florida
Demographic composition (age, race) by county/local workforce development board	N/A	Requested by CareerSource Florida
Eliminate multiple layers of administrative entities to improve coordination of the workforce development system	Yes	REACH

Establish consistent eligibility standards across the state to improve the accountability of workforce related programs	Yes	REACH
Provide greater flexibility in allocating resources to maximize the funds directed to training and business services	Yes	REACH
Florida Department of Economic Opportunity Local Workforce Development Area Designation Analysis and Organizational Boundary Scenarios	N/A	N/A
Florida Department of Education’s Adult Education Delivery System Evaluation	N/A	N/A

\*Language taken directly from WIOA legislation

**2.2 Organizational and Operational Research**

The table below captures organizational and operational items that EY will research and compile related to the local workforce development boards. This information will be gathered through a Request for Information distributed to each of the local workforce development boards with the assistance of CareerSource Florida. The Request for Information will be part of the project plan.

Operational Research Considerations	Source
Active lease terms and properties	Local Workforce Development Boards
Case management and CRM tools	Local Workforce Development Boards
Organizational structure	Local Workforce Development Boards

**2.3 Background Research and Analysis Report (key deliverable)**

EY will develop a research report that summarizes findings from the Statewide Data Collection and Analysis and the Organizational and Operational Research.

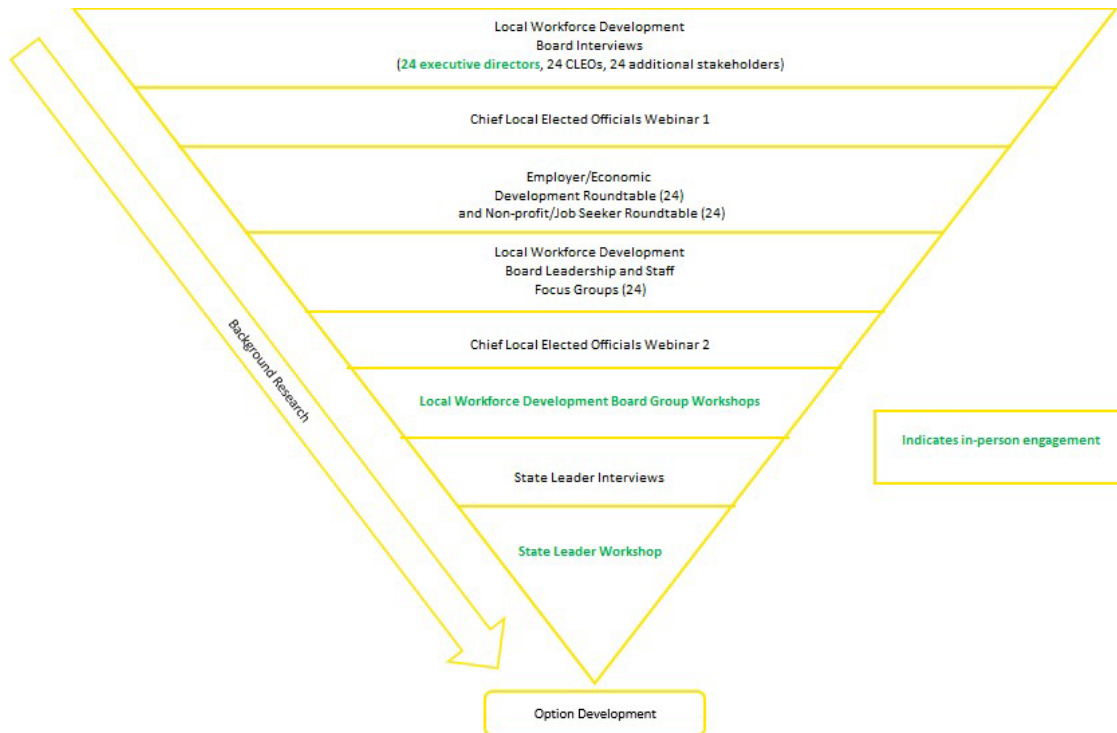
**3. Local and State Stakeholder Engagement**

Phase 2 Stakeholder Engagement will seek to collect input and information from each local workforce development board, other local representatives including employers and those representing job seekers, and state leaders on opportunities to improve overall Florida workforce development system alignment. This phase of engagement will draw from the findings of Phase 1 and the background research and analysis conducted in Phase 2 to drive towards specific inputs to option development. EY will designate EY team members to each local workforce development area to engage stakeholders and understand the current state of the local workforce environment, including current pain points in the customer experience and potential opportunities for improvement. The engagement sessions will also focus on data analysis topics informing local workforce development area options (current labor markets, economic development areas, commuting patterns, poverty areas, etc.) to fill in any blanks with a local perspective. These sessions will expand upon initial stakeholder input in Phase 1 through conducting an in-depth focus on local perspectives and increasing opportunities for local workforce development boards and local representatives to contribute and provide input.

Stakeholder engagement activities will include the facilitation of the following interviews and group sessions. Additional detail on each is provided in the pages that follow.

- **Local Workforce Development Board Engagement**
  - Local Engagement Kick-Off Call (virtual)
  - CEO / Local Board Executive Director Interviews (24) (in person at the Florida Workforce Development Association’s Professional Development Summit and virtually for those who are unable to meet during the Summit)
  - Chief Local Elected Officials Interviews (24) (virtual)
  - Additional Local Interviews (24) (virtual)
  - Statewide CLEO Webinars (2) (virtual)
  - Local/Regional Employer and Regional Economic Development Roundtables (24) (virtual)
  - Relevant Local/Regional Non-Profits and Job Seeker Representatives Roundtables (24) (virtual)
  - Local Workforce Development Board Leader and Staff Focus Groups (24) (virtual)
  - Local In-Person Group Workshops by Geographic Region (6-7 depending on local workforce development board groupings) (in-person)
- **State Workforce Development System Interviews**
  - CareerSource Florida Interviews (5) (virtual)
  - Other State Stakeholder Interviews (3) (virtual)
- **State Leader Workshop**
  - Future State (1) (in-person)

The following graphic represents the progression of stakeholder engagement, working towards the goal of option development. Please note that all meetings will be conducted virtually unless denoted as “in-person.”



In addition to the aforementioned engagement activities, if desired, EY will work with CareerSource Florida to draft a questionnaire that can be made available to anyone else who wants to share their perspectives with the consulting team.

### 3.1 Local Workforce Development Board Engagement

EY will conduct interviews with local workforce development board leaders and local stakeholders as identified to hear their insights on workforce development system alignment needs and opportunities. In addition to interviewing the local workforce development board CEO and Chief Local Elected Officials, EY will conduct an additional one-on-one interview with an individual of the board's choice. It is expected that CareerSource Florida and the local workforce development board identify those participants and issue the invitation to meet with us at least two weeks in advance of the session or interview. EY will work with CareerSource Florida and its communications team to develop resources and tools to assist with those meetings, for example: draft meeting invitation language, draft written copy for introduction and about the project wording, feedback on outreach plans, and a draft template for taking notes and documenting input.

#### a. Local Engagement Kick-Off Call

At the commencement of Phase 2, EY will host a call or webinar including a brief presentation and overview of the planned stakeholder engagement and analysis to occur throughout the study period. CareerSource Florida can invite any partners or stakeholders they choose to participate in the call. The session will be conducted virtually.

#### b. Local Workforce Development Board One-on-One Interviews

EY will conduct up to 72 interviews, three for each of the 24 local workforce development



boards. EY will work with CareerSource Florida to schedule and communicate with each local workforce development board to prepare for each interview. It is anticipated these interviews will include the following for each region:

- CEO / local board executive director interviews
- Chief local elected officials (CLEO) interviews
- Additional local Interview as directed by the local workforce development board

EY will work with CareerSource Florida to schedule the 24 CEO interviews in-person during the Florida Workforce Development Association's Professional Development Summit the week of September 12<sup>th</sup>, 2022. Any CEO interviews not conducted that week will be conducted virtually. CareerSource Florida will be responsible for identifying and securing meeting locations, AV equipment, meals and refreshments, and other meeting support logistics for these in-person meetings.

**c. Local Roundtables**

- **Local/Regional Employer and Economic Development Leader Roundtables:** EY will virtually conduct one employer roundtable session in each local workforce development area that includes representatives knowledgeable of the board's services and who have experience interacting with the local workforce development board. These sessions will focus on employer needs (current and anticipated) and opportunities for system improvements. These sessions will also include representatives from the area's economic development organization(s). Each session will last approximately 1 hour and will include 10-15 participants. EY anticipates that participants will be identified by CareerSource Florida and the local workforce development board and CareerSource Florida will issue invitations at least two weeks in advance of the session.
- **Relevant Local/Regional Non-Profits and Job Seeker Representatives Roundtables:** EY will also virtually conduct one roundtable discussion in each local workforce development area with individuals who can provide perspective on the job seeker experience interacting with the local workforce development board and system. This might include local non-profit organizations that support individuals in need of employment, upskilling, or wraparound services. Each session will last approximately 1 hour and will include 10-15 participants. EY anticipates that participants will be identified by CareerSource Florida and the local workforce development board and CareerSource Florida will issue invitations at least two weeks in advance of the session.

**d. Local Workforce Development Board Leadership and Staff Focus Groups**

EY will facilitate a 1-hour workshops with leadership of each of the 24 local workforce development boards. These sessions will encourage candid and thoughtful input from local workforce development board leaders and key staff on current state successes, challenges, and opportunities. The conversations will also solicit perspectives regarding the ideal future state of the workforce development system, along with what qualities and goals must be considered when developing considerations for workforce board alignment. EY will share key themes from stakeholder engagement and solicit feedback from participants on those themes. It is expected that CareerSource Florida and the local workforce development board identify participants and issue invitations at least two weeks in advance of the session.

**e. Chief Local Elected Officials (CLEOs) Informative Webinars**

In addition to conducting one-on-one interviews with CLEOs, EY will participate in up to two webinars with CLEOs to share information about this alignment process. EY will participate in and assist CareerSource Florida with facilitating up to two webinars, organized by CareerSource Florida, with CLEOs from across the state.

**3.2 State-Level Workforce Development System Stakeholder Engagement**

EY will conduct interviews with state-level workforce development leaders as identified by CareerSource Florida to hear their insights on workforce board alignment needs and opportunities. These stakeholders may include, for example, individuals from CareerSource Florida, the REACH Act Office, WIOA partners, state economic development leaders, and/or others of CareerSource Florida's choice. These sessions will build on the information gathered in Phase 1 and are intended to help synthesize inputs previously received, refine assumptions, and support option development.

**a. State Leader Interviews**

EY will conduct up to eight one-on-one interviews with state-level leaders to solicit guidance on current state, potential future state, goal development, and overall potential workforce alignment. EY will offer guidance to CareerSource Florida to help identify state leaders for inclusion in interviews.

**3.3 Stakeholder Engagement Summary Report (key deliverable)**

Upon completion of both local and state level stakeholder engagement, EY will prepare a Stakeholder Engagement Summary Report to aggregate major themes from throughout the entire engagement process. The report will be utilized with the Background Research and Analysis Report as an inputs to option development and to inform the Future State Options Report.

**4. Future State Strategy Development**

Following background research and analysis and stakeholder engagement, EY will engage local and state leaders in a final future state development process, leading to the formulation of three options for consideration by the CareerSource Florida Board of Directors.

**4.1 Local and State Leader Future State Workshops**

**a. Local Workforce Development Board Workshops by Geographic Grouping**

Upon the completion of the local workforce development board leader focus groups, EY will host up to eight in-person engagement sessions with staff and leaders representing each of the local workforce development boards grouped by geographic proximity. These sessions will be three hours long and will focus on the future of the workforce development system, including options for greater alignment and consolidation. These sessions will have a virtual option for those participants who are unable to join in-person.

**b. State Leader Workshop**

EY will also conduct an in-person State Leader Workshop with participants identified by CareerSource Florida. This workshop will include a summary of all to-date findings, synthesized

into key themes and considerations for consolidating and aligning the local workforce development boards and system. During the session, EY will ask participants to provide input to the selection of the three options that will be presented to the CareerSource Florida Board of Directors meeting in February 2023.

#### **4.2 Option Development and Future State Options Report**

EY will develop three potential options for action to be considered by the CareerSource Florida Board of Directors. These options will be developed in coordination with CareerSource Florida staff and the REACH Act office, and will focus on federal WIOA requirements, REACH Act priorities, stakeholder input, and research from Phases 1 and 2. The options will be included in the Final Project Report and in a PowerPoint presentation to be delivered at the February 2023 - CareerSource Florida Board of Directors meeting. Information in the option descriptions will include:

- Maps of potential new local workforce development area geographies
- WIOA and REACH Act compliance factors
- High-level change management considerations
- Benefits and risks

### **5. Final Report**

#### **5.1 Future State Options Board Presentation** *(key deliverable)*

The Future State Options Presentation will be presented to the CareerSource Florida Board of Directors at the February 2023 Board meeting. It will include descriptions of each option as described in 4.2 and relevant background information.

#### **5.2 Final Summary Report** *(key deliverable)*

EY will develop a written summary of findings and suggestions that will incorporate all aspects of the identified scope of work, including the Background Research and Analysis Report, the Stakeholder Engagement Summary Report, and the Future State Options Report. The final report will be addressed to CareerSource Florida for the purposes of evaluating options related to the REACH Act. The final report will be delivered to CareerSource Florida prior to the February 2023 Board of Directors meeting.

# Project Timeline

The following table provides a timeline for the project by task.

TIMELINE	Phase / Task	Month					
		Sep	Oct	Nov	Dec	Jan	Feb
<b>Project Management Workstream</b>							
1.1	Project Set-Up						
1.2	Project Communications						
1.3	Ongoing Project Support Activities						
<b>Background Research and Analysis</b>							
2.1	Statewide Data Collection and Analysis						
2.2	Organizational and Operational Research						
2.3	Background Research and Analysis Report						
<b>Stakeholder Engagement Workstream</b>							
3.1	Local Workforce Development Board Engagement						
3.2	State Level Workforce Development System Stakeholder Engagement						
3.3	Stakeholder Engagement Summary Report						
<b>Future State Strategy Development</b>							
4.1	Local and State Leader Future State Workshops						
4.2	Option Development and Future State Options Report						
<b>Final Report</b>							
5.1	Future State Options Board Presentation						
5.1	Final Summary Report						

## The Team

Listed below are key personnel including project leadership and workstream leads. EY will incorporate additional resources within each workstream based on experience as needed to complete project activities. The team of key personnel that led Phase 1 of CareerSource Florida’s Workforce Board Alignment Evaluation brings an understanding of Florida’s workforce development system, REACH Act priorities, WIOA priorities, and other factors relevant to this Phase 2 scope. EY’s Economic Development Advisory Services team is experienced in strategic planning, stakeholder engagement, and analysis. EY’s People Advisory Services team is skilled in the fields of organizational and workforce transformation with a focus on humans at the center of change. Several leaders on the project team were engaged with Tennessee Department of Labor and Workforce Development’s recent system changes, including improvements to the customer experience. EY will also dedicate Florida account executives responsible for monitoring quality and client satisfaction throughout the life cycle of the project.

EY key personnel will include the following individuals:

Candidate Name	EY Job Title and Project Role	Education	Years of Experience
<b>Amy Holloway</b>	<ul style="list-style-type: none"> <li>➤ Principal Consultant</li> <li>➤ Engagement Partner and Team Lead</li> <li>➤ Workstream Lead</li> </ul>	<ul style="list-style-type: none"> <li>➤ BBA, Economics Baylor University</li> <li>➤ MS, Environmental Economics Baylor University</li> </ul>	25+
<b>Dawn Woods</b>	<ul style="list-style-type: none"> <li>➤ Principal Consultant</li> <li>➤ Quality Partner</li> </ul>	<ul style="list-style-type: none"> <li>➤ BS, Management Information Systems, Auburn University</li> </ul>	15+
<b>Chris Ward</b>	<ul style="list-style-type: none"> <li>➤ Principal Consultant</li> <li>➤ Project Advisor</li> <li>➤ Workstream Lead</li> </ul>	<ul style="list-style-type: none"> <li>➤ Ed.M., Human Development and Psychology, Harvard University</li> <li>➤ MBA, Corporate Finance, University of Georgia, Terry College of Business</li> <li>➤ BBA, Management Sciences, University of Georgia</li> </ul>	20+
<b>Clint Fuhrman</b>	<ul style="list-style-type: none"> <li>➤ Senior Manager</li> <li>➤ Client Engagement Lead</li> <li>➤ Workstream Lead</li> </ul>	<ul style="list-style-type: none"> <li>➤ MS, Health Policy and Administration, Pennsylvania State University</li> <li>➤ BS, History and Social Sciences, Florida State University</li> </ul>	20+
<b>Chris Gianutsos</b>	<ul style="list-style-type: none"> <li>➤ Principal Consultant</li> <li>➤ Subject Matter Expert</li> </ul>	<ul style="list-style-type: none"> <li>➤ MBA, Columbia University</li> <li>➤ BS, University of Connecticut</li> </ul>	20+
<b>Jung Kim</b>	<ul style="list-style-type: none"> <li>➤ Manager</li> <li>➤ Research Manager</li> </ul>	<ul style="list-style-type: none"> <li>➤ MS, Regional and Urban Planning, London School of Economics</li> <li>➤ BA, Sociology and Urban Studies, Northwestern University</li> </ul>	15+

<b>Geri Lopez</b>	<ul style="list-style-type: none"> <li>➤ Manager</li> <li>➤ Stakeholder Engagement Manager</li> </ul>	<ul style="list-style-type: none"> <li>➤ MS, City Planning, Massachusetts Institute of Technology</li> <li>➤ BA, Architecture, Yale University</li> </ul>	20+
<b>Sarah Gosselin</b>	<ul style="list-style-type: none"> <li>➤ Senior Consultant</li> <li>➤ Project Manager</li> </ul>	<ul style="list-style-type: none"> <li>➤ MPA, Public Policy and Management, Florida State University</li> <li>➤ BA, English and Criminology, Florida State University</li> <li>➤ PMP, PMI Institute</li> </ul>	5
<b>AJ Temple</b>	<ul style="list-style-type: none"> <li>➤ Consultant</li> <li>➤ Project and Stakeholder Engagement Support</li> </ul>	<ul style="list-style-type: none"> <li>➤ BA, American Government, University of Virginia College of Arts &amp; Sciences</li> <li>➤ Master of Public Policy Frank Batten School of Leadership &amp; Public Policy, University of Virginia</li> </ul>	1

## Interview Questions for CareerSource Florida Local Workforce Development Board CEO Interviews

Week of September 12-16, 2022

1. First, tell us a little bit about your local workforce development board. What workforce development initiatives in your local area have been especially impactful?
2. The REACH Act includes the goals of eliminating unnecessary administrative entities, establishing consistent eligibility standards across the state, and providing greater flexibility for resource allocation to increase funds directed to training and business services. How could alignment through the reduction of the number of local workforce development boards as mandated by the REACH Act present **opportunities** for the system?
3. How could alignment through the reduction of the number of local workforce development boards as mandated by the REACH Act present **challenges** for the system?
4. What excites you or concerns you about this effort?
5. Let's end with relationships. Could you describe the strengths of your relationships with regional partners and other Local Workforce Development Boards near your area? How are you collaborating now (i.e., sector strategies, procurement, similar vendors, associations, co-located spaces)? What organizations or core WIOA partners do you share with surrounding local workforce development boards?

Dear \_\_\_\_\_:

As the members of the Citrus Levy Marion Workforce Development Consortium, the local governing body for our workforce region, we want to confirm our support for the goals of efficiency, improving performance, and collaboration contained within the REACH Act (HB1507).

We do, however, have concerns about the realignment of the local workforce system contained in the Act.

Our local area is designed around our state college district. Our local board works closely with the College of Central Florida and our three school districts to meet the needs of career seekers and employers within our three counties. It collaborates with our three economic development agencies to support the demands of local expanding businesses and those businesses that are growing within our community. Throughout our communities, the Board has engaged other community partners, such as Habitat for Humanity, to help improve the lives of residents and train those youth in our communities who are without skills and face barriers to employment. It is a strong collaborator within our counties.

They work with the local board based in Madison to reduce administrative and personnel costs through a unique partnership wherein our finance staff serves as theirs and, as the employer of record for their staff, save them personnel and benefit costs.

In the past 27 years, our management team has assisted two other regions, at the request of that region and the State agency, who have had situations that caused their local elected officials to restructure. The latest of these was in late 2019.

In the years since 1995, our financial and management audits and state agency reviews have consistently reported strong compliance with no adverse findings or questioned costs.

We regard these facts as meeting the key goals of the REACH Act and would hope that the record of our area and its Board will allow it to remain as currently configured. However, should a realignment process proceed, we request that we have strong representation in that process.

Sincerely,

Commissioner Carl Zalak, Marion County, Chairman

Commissioner Ruthie Davis Schlabach, Citrus County, Member

Commissioner Lillie Rooks, Levy County, Member



# AFFORDABLE HOUSING

	CITRUS	LEVY	MARION	FLORIDA
<b>Real Mean Home Sales Price (2021), Single Family</b>	\$245,740	\$241,602	\$240,188	\$472,789

Source: Florida Housing Data Clearing House - UFL Shimberg Center Analysis of Florida Department of Revenue

<b>Housing Cost Burden over 30% income, 2020 Estimate (All Households)</b>	25.70%	23.72%	25.98%	34.64%
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Source: Florida Housing Data Clearing House - UFL Shimberg Center Analysis US Department of Housing Development, Comprehensive Housing Affordability Strategy

<b>Housing Cost Burden over 30% income, 2020 Estimate (Rental Households)</b>	52.17%	39.09%	42.62%	52.41%
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Source: Florida Housing Data Clearing House - UFL Shimberg Center Analysis US Department of Housing Development, Comprehensive Housing Affordability Strategy

<b>Housing Cost Burden over 30% income, 2020 Estimate (Owner-Occupied Households)</b>	19.78%	19.26%	20.55%	25.27%
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Source: Florida Housing Data Clearing House - UFL Shimberg Center Analysis US Department of Housing Development, Comprehensive Housing Affordability Strategy

Average Hourly Wage (2021)	Maximum Affordable Rent (30% of Income)	HUD 3BR Fair Market Rent	% Income Needed for 3 BR FMR	HUD 3BR AVG Rent	% Income Needed for 3 BR AVG
Citrus - \$21.80/hr	\$1,134	\$1,316	34.82%	1349	35.69%
Levy - \$17.83/hr	\$927	\$1,021	33.03%	1034	33.45%
Marion - \$21.77/hr	\$1,132	\$1,285	34.06%	1310	34.72%

Source: Florida Housing Data Clearing House - UFL Shimberg Center Analysis US Department of Housing Development, Comprehensive Housing Affordability Strategy

Note: Affordable units are those for which a household at the given income limit (% AMI) would pay no more than 30% of income for gross rent.

### Points of consideration:

- Average single-family home prices in Citrus County are up 20% since the 2019.
- Average single-family home prices in Levy County are up 23% since the 2019.
- Average single-family home prices in Marion County are up 15% since 2019.
- Per the Marion County Housing Finance Authority, Marion County needs to construct about 4,235 new homes a year to cover population growth trends. We are currently over 6,000 units behind.

**BOARD MEETING AGENDA**  
**Wednesday, September 7, 2022 – 11:30 a.m.**  
**College of Central Florida – Levy Campus – Conference Center**  
**15390 US 19, Chiefland, FL 32626**

<p><b>Join Zoom Meeting:</b> <a href="https://us02web.zoom.us/j/89061721141">https://us02web.zoom.us/j/89061721141</a>  <b>Conference Line:</b> 1 646 558 8656 <b>Meeting ID:</b> 890 6172 1141</p>
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Call to Order		B. Whiteman
Invocation and Pledge of Allegiance		R. Stermer
Roll Call		C. Schnettler
Public Comment		B. Whiteman
Approval of Minutes, June 7, 2022	Pages 3 - 49	B. Whiteman
Board Member Introductions		B. Whiteman

**LUNCH**

**DISCUSSION ITEMS**

State Update		R. Skinner
Redesignation Criteria	Pages 50 - 55	R. Skinner
Workforce Issues that are Important to our Community		R. Skinner
Workforce Housing		R. Skinner

**ACTION ITEMS**

Budget 2022-2023	Pages 56 - 57	D. French
One Stop Operator	Pages 58 - 60	D. French

**CONSENT AGENDA**

<u>Performance and Monitoring – 8/9/2022</u>		
Monitoring Report	Page 61	J. Chang
<u>Business and Economic Development – 8/10/2022</u>		P. Beasley
No Action Items		
<u>Career Center – 8/18/2022</u>		
ITA Waiver Extension	Pages 62 - 64	C. Harris
OJT Reimbursement Cap		
LT3 Academy		
Rapid Response Policy		

Marketing and Outreach – 8/17/2022  
No Action Items

C. Flanagan

Executive Committee – 8/31/2022  
Rapid Response Policy  
2022 FWDA Summit Sponsorship  
Collection of Demographic Data  
Final Budget 2022-23  
ITA Waiver Extension  
NCBDC MOU Renewal  
Performance Negotiations  
Local Plan Updates

Pages 65 - 72

B. Whiteman /  
R. Skinner

**PROJECT UPDATES**

None

**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