



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

Consortium

REVISED AGENDA

Wednesday, March 1, 2023 – 2:00 p.m.

**Zoom Meeting: <https://us02web.zoom.us/j/81232166574>
Phone 1-646-558-8656 Meeting ID: 812 3216 6574**

Call to Order C. Zalak
Roll Call C. Schnettler
Approval of Minutes, January 12, 2023, January 18, 2023 Pages 2 - 15 C. Zalak

PUBLIC COMMENT

DISCUSSION ITEMS

Workforce Area Realignment R. Skinner

ACTION ITEMS

Board Appointment - Tanya Taylor Pages 16 - 18 R. Skinner
Budget Update Pages 19 - 24 D. French
One Stop Operator ITN Pages 25 - 63 D. French

PROJECT UPDATES

None

MATTERS FROM THE FLOOR

ADJOURNMENT

OUR VISION STATEMENT

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



**CAREERSOURCE CITRUS LEVY MARION
Consortium**

MINUTES

DATE: January 12, 2023
PLACE: College of Central Florida – Enterprise Center
TIME: 10:00 a.m.

MEMBERS PRESENT

Commissioner Finegan
Commissioner Hodge
Commissioner Zalak

MEMBERS ABSENT

OTHER ATTENDEES

Rusty Skinner, CSCLM
Dale French, CSCLM
Robert Stermer, Attorney

Cira Schnettler, CSCLM
Katie Flury, Gray Robinson
Angela Drzewiecki, Gray Robinson

CALL TO ORDER

The meeting was called to order by Commissioner Zalak, at 10:07 a.m.

ROLL CALL

Cira Schnettler called roll and a quorum was declared present.

APPROVAL OF MINUTES

Commissioner Zalak made a motion to approve the minutes from the September 21, 2022 meeting. Commissioner Hodge seconded the motion. Motion carried.

PUBLIC COMMENT

None

ACTION ITEMS

None

DISCUSSION ITEMS

State Update

Commissioner Zalak invited Katie Flury and Angela Drzewiecki to provide a brief overview of House Bill 1507, the Reach Act, and the status of workforce area realignment. Katie Flury and Angela Drzewiecki provided an outline of how the House Bill transpired, as well as components and mandates in the Reach Act. The committee discussed the existing strengths CareerSource CLM has with regional and community

partners. The committee further discussed strategies for addressing the realignment with the State's consultant. The committee will have the opportunity to meet with the State's consultant on January 18 for an interview. The interview questions and staff comments were provided by email to the Consortium members before this meeting and will be included in these minutes.

Katie Flury explained that the State's consultant will provide a recommendation at the February CareerSource Florida board meeting. Rusty Skinner, Katie Flury, and Angela Drzewiecki will be in attendance. Commissioner Zalak will follow up with Rusty Skinner if he is able to attend as well.

PROJECT UPDATES

Board Meeting 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 10:52 a.m.

APPROVED:

Interview Questions for Chief Local Elected Officials

January 17-19, 2023

The following information has been developed to help chief local elected officials prepare for their interviews with the EY consulting team. The purpose of the 45-minute interview is to gain their leadership perspective on the future of Florida's workforce system and the implementation of the Reimagining Education and Career Help (REACH) Act, which charges the state with reducing the number of local workforce boards. The consulting team will seek feedback through a series of interview questions, as noted below.

Background

The Workforce Innovation and Opportunity Act (WIOA) envisions a workforce development system that focuses on the needs of job seekers and businesses; and anticipates and responds to the needs of local and regional economies. WIOA requires that local workforce development boards and chief local elected officials design and govern the system regionally, align workforce policies and services with regional economies, and support service delivery strategies to address those needs.

The REACH Act charges the state with **reducing the number of local workforce development boards** to achieve three major objectives: 1.) Eliminate multiple layers of administrative entities **to improve coordination** of the workforce development system, 2.) **Establish consistent eligibility standards** across the state to improve the accountability of workforce-related programs, and 3.) Provide greater flexibility in allocating resources to **maximize the funds directed to training and business services**. CareerSource Florida is leading the Alignment Evaluation initiative in collaboration with the Governor's REACH Office.

Interview Questions

1. Would you **please introduce yourself and share your experience with the state and local workforce development system?**
2. The state of Florida is considered a leader in workforce development. Florida has 24 local workforce development boards that serve 24 local workforce development areas. Florida's workforce system focuses on continuous improvement while preparing for future economic growth. Florida businesses report a strong need for skilled talent to support their growth. Obtaining and retaining employment can be a strong vehicle for economic self-sufficiency for Floridians. **What are the current needs of businesses and job seekers in your local workforce development area?**
3. **What opportunities exist locally and regionally to improve workforce development efforts to meet the needs of those businesses and job**

seekers in your community? What actions would you like to see pursued by the state and local workforce development boards to achieve those improvements?

4. **What opportunities do you see for greater collaboration among workforce development partners and others to enhance services and resources for businesses, job seekers and workers in your community?** If you cannot think of any, are there any programs or practices from outside your local workforce development area you would like to see replicated locally?
5. WIOA asks that local workforce development areas cover common economic development areas, labor markets, and contain adequate training providers. The REACH Act asks that population and commuting patterns be considered when formulating new local workforce development areas. **What other data points should be prioritized for local workforce development board alignment and local workforce development area designation?**
6. How would you describe the **ideal future state of Florida's workforce development system** to prepare Florida's workforce and businesses for future economic growth?

REACH ACT

ALIGNMENT EVALUATION GUIDING PRINCIPLES



The following Guiding Principles serve as a beacon for CareerSource Florida and the extended implementation team to help guide the research and discovery process.

1

Prioritize implementation of the REACH (Reimagining Education and Career Help) Act and legislative directive to enhance alignment and accountability that follows federal Workforce Innovation and Opportunity Act (WIOA) criteria.

2

Identify considerations that are responsive to the needs of job seekers and business customers while prioritizing access to services and maximizing available resources.

3

Commit to open and transparent process in every phase of work.

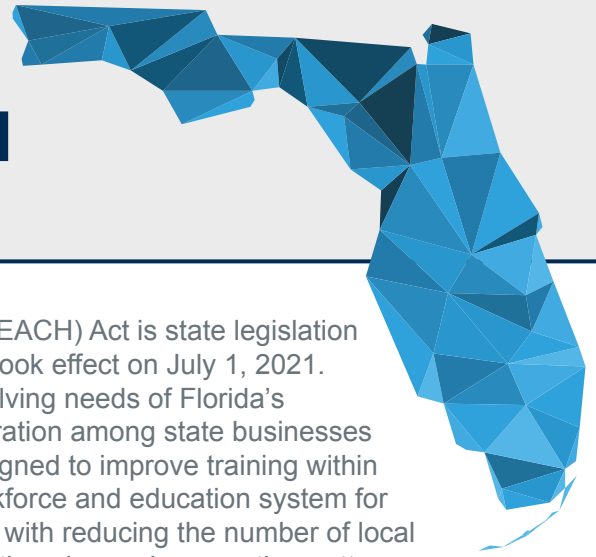
4

Engage in holistic listening to drive transformative solutions.

5

Communicate proactively to audiences and stakeholders throughout the journey.

REACH ACT ALIGNMENT EVALUATION



WHAT

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

WHO

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

WHEN

As part of the REACH Act alignment evaluation process, CareerSource Florida has contracted with EY (Ernst & Young LLP) to conduct research and discovery. This includes listening to stakeholders, analyzing data, and examining solutions implemented in other states. Initial observations from Phase One were reported to the CareerSource Florida Board of Directors on June 9, 2022, with EY's [findings report](#) published on careersourceflorida.com in July. The second phase of this multi-phase initiative launched in September 2022. It includes a deeper analysis and more robust engagement with local stakeholders and customers across the state, including 150 online and in-person meetings/interviews. Alignment considerations that will affect the redesignation of local workforce development areas and the consolidation of local workforce development boards are anticipated to be provided to the CareerSource Florida Board of Directors by early 2023.

WHY

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

WHERE

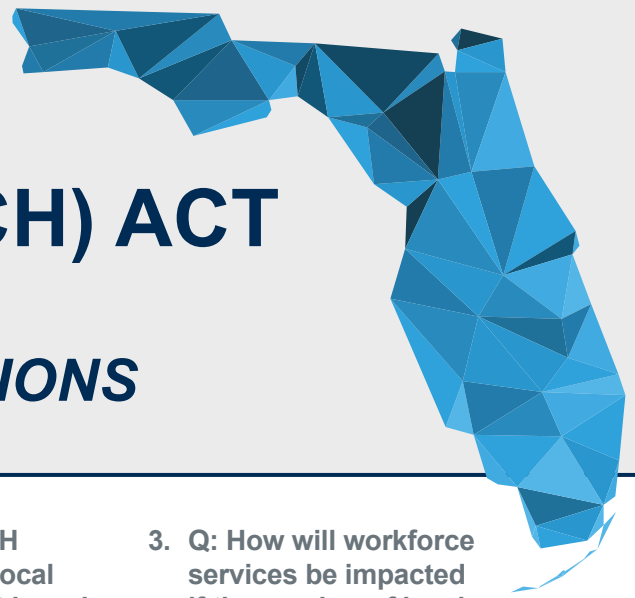
The alignment evaluation process encompasses all partners and processes across Florida, including CareerSource Florida, the 24 local workforce development boards, businesses and job seekers to ensure equity and access for all Floridians.

HOW

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

REIMAGINING EDUCATION AND CAREER HELP (REACH) ACT

FREQUENTLY ASKED QUESTIONS



1. Q: What is the REACH Act?

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

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

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

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

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

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

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

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

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

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

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

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

A: The REACH Act aims to improve services for job seekers, workers, and businesses by increasing collaboration, coordination, and consistency. Ensuring every Florida community continues to receive quality employment and training services remain a top priority. The needs of customers will guide the alignment evaluation process that will affect any recommendations for the consolidation of local workforce development boards and the directly related redesignation of local workforce development areas.

4. Q: Who is leading the alignment process?

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

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

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

- Prioritize implementation of the state Reimagining Education and Career Help (REACH) Act and legislative directive to enhance alignment and accountability that follows federal Workforce Innovation and Opportunity Act (WIOA) criteria.
- Identify considerations that are responsive to the needs of job seekers and business customers while prioritizing access to services and maximizing available resources.
- Commit to an open and transparent process in every phase of work.
- Engage in holistic listening to drive transformative solutions.
- Communicate proactively to audiences and stakeholders throughout the journey.

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

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

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

A: The REACH Act specifically references reducing the number of local workforce development boards based on population and commuting patterns. Other relevant factors to achieve the act's desired goal may be considered.

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

A: As the Governor's principal workforce development policy organization, CareerSource Florida is conducting a research and discovery process that includes listening to local workforce development board leaders, elected officials, leaders in business and education, and other stakeholders. This work is being conducted in collaboration with the Governor's REACH Office. As part of the alignment evaluation process, CareerSource Florida has contracted with EY (Ernst & Young LLP) to conduct research and discovery. This includes listening to stakeholders, analyzing data, and examining solutions implemented in other states.

Initial observations from Phase One were reported to the CareerSource Florida Board of Directors on June 9, 2022, with EY's findings report published on careersourceflorida.com in July. The second phase of this multi-phase initiative launched in September 2022. Phase Two includes a deeper analysis and more robust engagement with local stakeholders and customers across the state, including more than 150 online and in-person meetings/interviews.

Alignment considerations that will affect the redesignation of local workforce development areas and the consolidation of local workforce development boards are anticipated to be provided to the CareerSource Florida Board of Directors by early 2023.

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

A: In addition to the more than 150 by-invitation local engagement sessions for local workforce development board leaders, chief local elected officials, businesses, and other stakeholders occurring from September 2022-January 2023, you may share your feedback for consideration using the [Alignment Feedback Form](#).

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

A: CareerSource Florida is continuing this alignment evaluation work in response to the REACH Act with in-depth data analysis and stakeholder engagement. Numerous sources of public information available through the Florida Department of Economic Opportunity were used to inform the research, discovery and findings of Phase One, which can be found in the [findings report](#). For Phase Two, the consulting firm EY will examine numerous factors identified as essential for realignment considerations by the

REACH Act, the federal Workforce Innovation and Opportunity Act and CareerSource Florida.

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

A: Yes. Alignment and changes in how services are delivered are being discussed nationally and are taking place in multiple states, including North Carolina, Iowa, and Tennessee. Consulting firm EY researched other states that have undertaken alignment actions, and those findings were included in their Phase One [findings report](#) this summer. Additional research is being conducted as part of Phase Two, and that report, which will include alignment options to address the REACH Act requirement for the reduction of local workforce development boards, will be shared on the CareerSource Florida website in January 2023.

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

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

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

13. Q: Where can I get more information?

A: This REACH Act webpage has up-to-date information about the REACH Act and the ongoing engagement process. Updates will be provided through every phase of the process. You can also submit questions or comments using the [Alignment Feedback Form](#).

CAREERSOURCE FLORIDA AT A GLANCE



Collaborate. Innovate. Lead.

WHO WE ARE: As the state’s principal workforce policy organization, CareerSource Florida is a key contributor to efforts to develop and sustain a skilled workforce to meet the demands of Florida’s growing economy. CareerSource Florida, the state policy and investment board, is joined in its important work by the Florida Department of Economic Opportunity, administrative entity for state workforce programs; 24 locally managed workforce development boards; and nearly 100 career centers — known collectively as the CareerSource Florida network. The current workforce system structure was set in 2000 through landmark, bipartisan state legislation, the Florida Workforce Innovation Act.

The Florida Legislature unanimously passed another landmark workforce and education systems bill, the Reimagining Education and Career Help (REACH) Act, that was signed into law by Gov. Ron DeSantis and took effect July 1, 2021. The REACH Act is a comprehensive blueprint for supporting the needs of the state’s evolving economy through a more integrated, customer-focused and accountable workforce development ecosystem that spans Florida’s education, workforce and public assistance programs. The law seeks to increase collaboration, improve training and enhance equity and access for all Floridians.

WHAT WE DO: CareerSource Florida works with partners in business and industry, education, economic development and community development to achieve our vision to make Florida the global leader for talent, and we fulfill our mission with honesty, accountability and transparency.

WHY IT MATTERS: Building and maintaining a skilled workforce is essential not only for Florida businesses, but also to ensuring Florida communities are vibrant and prosperous and their residents have access to good jobs and careers. As a recognized leader in Florida’s talent ecosystem, the CareerSource Florida network is committed to addressing the talent needs of today and tomorrow. Last year, the network assisted nearly **86,500 job seekers**, including more than **4,100 veterans**, and provided services to more than **50,700 businesses**.

LEADERSHIP: CareerSource Florida is led by a board of directors appointed by the Governor, Florida Senate President and Florida House Speaker. The board is made up of leaders in business, government, education, labor, economic development and community development who provide policy direction for about \$245 million in annual workforce investment to address the employment and training needs of job seekers, workers and businesses.



STEPHANIE SMITH

*Chair, Board of Directors
Vice President, State & Regional
Affairs, TECO*



MICHELLE DENNARD

*President and CEO
CareerSource Florida*

FEDERAL PUBLICATIONS & GUIDANCE; STATE LAWS, RULES & POLICY

- Public Law 113-128 (WIOA)
- Public Law 104-193 (TANF Block Grants)
- Wagner-Peyser Act of 1933, as amended
- USDOL Employment and Training Administration Final Rule 20 CFR Part 652 et al.
- FL Statutes Ch. 445
- FL Statutes Ch. 14.36 (REACH Act)

REACH ACT STATE PARTNERS



MISSION: The Florida Workforce System connects employers with qualified, skilled talent and Floridians with employment and career development opportunities to achieve economic prosperity.

LOCAL WORKFORCE DEVELOPMENT BOARDS:

Florida's local workforce development boards are the backbone of the CareerSource Florida network. These boards — directed by business and other community leaders — work locally and regionally to convene local talent supply stakeholders, develop data-driven strategies, leverage resources and deliver valuable services to meet workforce needs.

2022 – 2023 STRATEGIC INITIATIVES:

Working with its partners, CareerSource Florida is focused on the following board-approved priorities and initiatives:

- ▶ **REACH ACT IMPLEMENTATION** — The REACH Act compels statewide systems responsible for educating, training and helping Floridians in need connect to education, employment and supportive services to work together more intentionally and effectively, so that more Floridians may achieve economic self-sufficiency.

Specifically, CareerSource Florida is charged with development of and support for the Florida Credentials Review Committee of business, education and workforce leaders to define credentials of value that align with in-demand jobs and careers in industries that drive Florida's economy.

With a focus on improved accountability, the law also calls for the Governor's REACH Office to develop outcome-based criteria for assigning a letter grade to each local workforce development board and for CareerSource Florida to assign and make the letter grades public annually.

Additionally, in collaboration with the REACH Office, CareerSource Florida is exploring approaches to aligning Florida's 24 local workforce development boards, consistent with the consideration of any benefits that might come through reducing the number of local boards as specified in the REACH Act to:

- Eliminate multiple layers of administrative entities to improve coordination;
- Establish consistent eligibility standards across the state to improve accountability; and
- Provide greater flexibility in the allocation of resources to maximize funds for training and business services.

- ▶ **SUPPORTING AVIATION, AEROSPACE AND DEFENSE MANUFACTURING THROUGH A COMPREHENSIVE SECTOR STRATEGY APPROACH** — 2022-23 WIOA Governor's Reserve Funds and investments by other strategic partners will amplify a comprehensive investment approach directed by the agencies identified in the REACH Act to cultivate short- and long-term sustainable talent pipeline and accelerate Florida's competitiveness in this legacy sector.

- ▶ **FLORIDA RURAL COMMUNITIES** — To provide additional support to Florida's rural counties, \$2 million has been awarded to 11 local workforce development boards that serve rural communities to expand access to job seeker services and strengthen local collaboration with education and community-based partners to help residents gain skills and access to in-demand jobs and careers.

- ▶ **CAREER SUPPORT FOR SINGLE PREGNANT WOMEN** — Low-income single pregnant women seeking a pathway to prosperity may be assisted by new skill attainment through work-based learning and other training models. Helping mothers and mothers-to-be achieve successful employment provides opportunities for lasting positive impacts on these Floridians, their families and communities.

TRAINING GRANTS:

Quick Response Training and Incumbent Worker Training grants provide funds to new, expanding and existing businesses to train new hires and elevate the skills of existing employees.

- Since 1993, Quick Response Training has helped about **197,500** Floridians receive customized, skills-based training.
- The Incumbent Worker Training grant program has supported customized training for **nearly 3,000 Florida companies**, many of them small businesses.

Administered by CareerSource Florida, these nationally recognized grants are among the high-value tools available through the CareerSource Florida network to help strengthen business competitiveness and growth in the Sunshine State.



Want to know more? Visit careersourceflorida.com    

CareerSource Florida is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers on this document may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711. Disponible en Espanol.

Staff Comments on Questions for Ernst and Young Interview

2. The number one need that we hear daily is for candidates for their position vacancies by employers who have the soft skills of good employees- work ethic skills such as showing up on time each day, working well with their other employees and of course at least some technical skills. Job seekers are looking for jobs but after COVID, many are seeking a more worker friendly workplace. We are collaborating with our three school districts on promoting career opportunities and career exploration for 8th and 9th graders and employment transitions for juniors and seniors. Our Talent Center team works with the College of Central Florida, Marion Technical College, Withlacoochee Technical College and Rasmussen to link their students to career-related employment during school and transitions to full time employment at graduation. Our Business Services staff is augmented by business outreach through the economic development partners in each county- Citrus Chamber, Nature Coast Business Development Council in Levy and the Ocala Metro Chamber and Economic Partnership in Marion. Our targeted industries align with the economic development priorities of each of these partners.

3. Employment is not geographically restricted. We work with job seekers and businesses in the surrounding counties (a one hour commute distance) collaborating with the local workforce boards that support those counties involved. Our unique labor shed and location along the I-75 corridor ensures we partner closely with boards as far north as the state line and south to Tampa and beyond. One of the biggest complaints from both businesses and job seekers is the Employ Florida system. "Registration" for both employers and job seekers is frustratingly long and often turns both customers away from our services. For businesses, our staff offer to assist in their registration and job postings, but often the detailed information deters employer participation and effects the timeliness of data being inputted. The same for job seekers. Personal information like social security numbers is required prior to any assistance and unless they are required to gain other support- tuition assistance, training such as OJT, cash welfare, and unemployment- many job seekers don't fully register. Staff in our resource rooms offer to assist job seekers and provide services to many, but the detailed data requirements turn away those not committed to job search.

For our Talent Center (highly skilled technical and professional job seekers and job opportunities), we use a simpler, more private sector system for both job seekers and businesses, where just basic job information and job seeker qualifications are required.

As we assist customers, we ask if we can migrate their information into Employ Florida so that the system will give us credit for serving them. Most approve.

This is a key issue for better service to those customers.

For approximately five years, local boards have been asking for a federal waiver to allow the use of more of our WIOA Youth funds to assist “in-school” youth. Currently 75% must be spent on “out-of-school” youth. The remaining youth funds limit the types of services that can be provided to youth that are in-school. While the CareerSource Florida Board approved a waiver last year, it has yet to be submitted to USDOL by DEO.

The use of online education programs will greatly expand our ability to work with our school districts and the College of Central Florida to reach potential students. Currently, online training providers, mostly private sector, are not recognized as Eligible Training Providers. Inclusion of online providers and a more flexible approach to training have been requested for several years, yet it has received no “traction” at the state.

Statewide contracts in areas such as assessment programs, where the various products are available, but not mandated, would be helpful.

4. We collaborate now with the local boards that abut our counties- Regions 7, 8, 9, 11, 12 and 16. We serve as the finance office for Region 6 and serve as “employer of record” for their employees. This provides cost savings for both local boards by reducing administration costs and personnel costs. More coordination on job fairs and other hiring events will better support the needs of businesses and job seekers.

5. Most counties have other linkages with neighboring counties. Some of these facilitate relationships but some do not. These may be different philosophical approaches, or past or present controversies. Any restructuring should include a discussion on whether any proposed changes link a county with another county where relationships are amicable and their histories and visions align.

6. Florida’s workforce system should account for statewide needs incentivized by the state but remain locally focused and driven by the local officials responding to the needs of their specific area constituents.



**CAREERSOURCE CITRUS LEVY MARION
Consortium**

MINUTES

DATE: January 18, 2023
PLACE: College of Central Florida – Enterprise Center
TIME: 10:00 a.m.

MEMBERS PRESENT

Commissioner Finegan
Commissioner Hodge
Commissioner Zalak

MEMBERS ABSENT

OTHER ATTENDEES

Rusty Skinner, CSCLM
Dale French, CSCLM
Cira Schnettler, CSCLM

Andrew Collins, CareerSource Florida
AJ Temple, Ernst and Young
Geraldine Lopez, Ernst and Young
Sarah Gosselin, Ernst and Young

CALL TO ORDER

The meeting was called to order by Commissioner Zalak, at 10:05 a.m.

INTRODUCTIONS

Andrew Collins began the meeting by introducing himself and the role that CareerSource Florida plays in this process.

AJ Temple introduced the Ernst and Young team.

GUIDING PRINCIPLES

AJ Temple led the presentation by explaining the function of the REACH Act and the REACH office. He reviewed the guiding principles, which help prioritize implementation of the REACH Act, while keeping inline and compliant with WIOA criteria. He explained the end goal is to increase access for job seekers and businesses.

SCOPE OF WORK

AJ Temple outlined the scope of work. He noted that the Ernst and Young team has met with over 650 community stakeholders from around the State. Notable reoccurring themes from the meetings include:

- System wide improvements at local and state levels
- Concerns for the impact on rural communities

COMMISSIONER INTRODUCTIONS

1. The Consortium members introduced themselves, adding length of time and experience working with CareerSource and the workforce system in general.

INTERVIEW QUESTIONS

2. What are the current needs of businesses and job seekers in your local workforce development area?
 - a. The Commissioners noted that many employers struggle to find candidates for trade positions, CDL drivers, and health care positions. The lack of skilled labor is an issue across the board from the trades to professional positions. Strong partnerships with educational providers have been an asset for employers.
3. What opportunities exist locally and regionally to improve workforce development efforts to meet the needs of those businesses and job seekers in your community? What actions would you like to see pursued by the state and local workforce development boards to achieve those improvements?

Highlights of the discussion included:

 - a. Challenges to geographically collapsing the regions.
 - b. Streamlining the process of enrolling in Employ Florida.
 - c. Slow response time from the state on local requests.
 - d. Lack of approved training providers that offer online educational programs.
 - e. Rural areas have multiple issues that include not having enough attendees for in-person class size requirements, but also not having access to broadband for online training.
4. What opportunities do you see for greater collaboration among workforce development partners and others to enhance services and resources for businesses, job seekers and workers in your community?

Highlights of the discussion included:

 - a. Currently there are statewide groups for CEO, COO, Finance, etc. that meet monthly and communicate regularly on best practices and policy development. The meetings are a great opportunity for new people to receive support and cross collaboration for all positions.
 - b. There are challenges when trying to replicate programs across regions. Within our region alone all three counties have individualized needs and have customized community partnerships based on those needs.
 - c. Regular meetings with local, state, and federal representatives to discuss issues and streamline processes would be beneficial to all regions.

The meeting wrapped up at this point due to time constraints.

ADJOURNMENT

There being no further business, the meeting adjourned at 10:48 a.m.

APPROVED:



RECORD OF ACTION/APPROVAL

**Consortium Meeting
Wednesday, March 1, 2023**

TOPIC/ISSUE:

Board Appointment

BACKGROUND:

POINTS OF CONSIDERATION:

STAFF RECOMMENDATIONS:

Accept appointment of Tanya Taylor, School Board of Levy County, to the CareerSource CLM board of directors.

COMMITTEE ACTION:

BOARD ACTION:



SCHOOL BOARD OF LEVY COUNTY

CHRISTOPHER A. COWART

Superintendent

February 13, 2023

CAMERON ASBELL

District 1

PAIGE BROOKINS

District 2

ASHLEY CLEMENZI

District 3

TAMMY BOYLE

District 4

DEVIN WHITEHURST

District 5

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Bronson, FL 32621

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FAX 352-486-5237

An Equal
Opportunity Employer

The School Board of Levy
County does not
discriminate on the basis of
race, color, national origin,
gender, age, disability,
religion, marital status or
genetic information in its
educational programs,
services or activities,
or in its hiring or
employment practices.

Ms. Cira Schnettler
Research & Executive Assistant
CareerSource Citrus Levy Marion
3003 SW College Road, Suite 205
Ocala, FL 34474

Re: Tanya Taylor, Coordinator of Career Pathways / AVID

Dear Ms. Schnettler,

This letter serves to inform you that **Tanya Taylor, Coordinator of Career Pathways / AVID**, will be replacing Christie McElroy/Carol DuBois as the representative from Levy County to serve on the CLM Workforce Connection Board, and hereby authorizes her to attend meetings or sit on any other committees as needed/required by CLM Workforce in my place.

I look forward to continuing the successful relationship Levy County has enjoyed with the Workforce Board in the past.

Should you have any questions or if I need to do anything further to authorize Tanya Taylor to serve for Levy County, please let me know.

Sincerely,

Christopher A. Cowart, Superintendent
School Board of Levy County

CAC/alh

cc: Tanya Taylor, Coordinator, Career Pathways / AVID

**PERSONS DESIRING TO APPEAL ANY ACTION OF THE BOARD MAY BE REQUIRED BY
FLORIDA STATUTES TO PROVIDE A VERBATIM TRANSCRIPT OF SAID ACTION**

*Our mission is to educate all students in a safe environment and
to graduate them ready for college and career success.*



NOMINATION FORM

FAX: 352 873-7956

EMAIL: rskinner@careersourceclm.com

Phone: 352 873-7939, Ext 1203

Name: Tanya Taylor

Title: Coordinator of Career Pathways / AVID

Name of Business: School Board of Levy County

Address: 480 Marshburn Way

City: Bronson County: Levy Zip Code: 32621

Business Telephone-Ext: 352-486-5231 Fax _____

_____ Private Business Owner/Chief Executive

_____ Agency/Company Representing – Must be representative with optimum Policy-making authority

Home Address: _____

City: _____ County: _____ Zip Code: _____

Cell #: 352-258-1217

E-Mail Address: tanya.taylor@levyk12.org

INFORMATION REQUIRED BY THE STATE - Check all that Apply

| | |
|---|---|
| Sex: Male _____ | Female <input checked="" type="checkbox"/> |
| Race: White <input checked="" type="checkbox"/> | Black _____ Other _____ |
| White/Hispanic _____ | Black/Hispanic _____ |
| Veteran: Yes _____ | No <input checked="" type="checkbox"/> Disabled _____ |



RECORD OF ACTION/APPROVAL

**Consortium Meeting, Wednesday, March 1, 2023
Executive Meeting, Wednesday, March 1, 2023**

TOPIC/ISSUE:

Budget/Expenditure summary report for period 7/1/22-12/31/22

BACKGROUND:

The budget is updated for changes in revenue and expenditure. The attachment is a summary of the budget and actual expenditure.

POINTS OF CONSIDERATION:

The report provides the status of spending for planning purposes.

STAFF RECOMMENDATIONS:

Approve the Budget/Expenditure report.

COMMITTEE ACTION:

BOARD ACTION:

| BUDGET - CSCLM | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---------------------------------|------------------|------------------|---------------|-----------------|---------------|---------------|---------------|----------------|------------------|----------------|---------------|----------------|------------------|----------------|---------------|--------------------|---------------|-----------------|----------------|------------------------|--------------|----------------|----------------|------------------|--------------------|-----------|
| PY 2022 (JULY 2022 - JUNE 2023) | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 3/1/2023 | | 9/30/23 | | 12/31/23 | 6/30/23 | 3/31/2024 | 12/31/22 | | 9/30/23 | 12/31/23 | 12/31/22 | 6/30/23 | 9/30/23 | 6/30/23 | 6/30/23 | 6/30/23 | 6/30/23 | 6/30/23 | 6/30/23 | 6/30/23 | | | | | |
| | ADULT | YOUTH | TAA | DISL WORKER | LVER | RURAL | Re-Entry Nav | HURRICANE IAN | YTH BUILD 4 | WAGNER PEYSER | VETERAN DVOP | SUMMIT | WTP | SNAP | MOBILE REPAIR | RECOVERY NAVIGATOR | UNITED HEALTH | YOUTH BUILD 3 | RAPID RESPONSE | APPRENTICESH NAVIGATOR | RWB 6 | REA | UN-RESTR | TOTAL | | |
| REVENUE | | | | | | | | | | | | | | | | | | | | | | | | | | |
| P.Y. 2022 CONTRACTS | 1,208,208 | 1,150,624 | 28,318 | 767,457 | - | 62,500 | - | 100,903 | 844,712 | 162,606 | - | 140,000 | 1,369,016 | 327,789 | 10,000 | - | 99,992 | - | 80,494 | 62,500 | 5,481 | 226,309 | - | 6,646,909 | | |
| CARRYFORWARD | 191,650 | 165,848 | - | 339,986 | 30,887 | - | 95,967 | - | - | 45,471 | 31,262 | - | 771,091 | 72,617 | - | 101,121 | - | 254,232 | 37,852 | - | - | 97,779 | - | 463,211 | 2,699,074 | |
| INCENTIVES/SUPPLEMENTAL | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | |
| TRANSFER | 729,000 | - | - | (729,000) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | |
| TOTAL REVENUE | 2,128,858 | 1,316,472 | 28,318 | 378,443 | 30,887 | 62,500 | 95,967 | 100,903 | 844,712 | 208,077 | 31,262 | 140,000 | 2,140,107 | 400,406 | 10,000 | 101,121 | 99,992 | 254,232 | 118,446 | 62,500 | 5,481 | 324,088 | 463,211 | 9,345,984 | | |
| EXPENDITURES | | | | | | | | | | | | | | | | | | | | | | | | | | |
| TOTAL ITA | 46.35% | | | | | | | | | | | | | | | | | | | | | | | | | |
| TRAINING: | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ITA % | 48% | | | 30% | | | | | | | | | | | | | | | | | | | | | | |
| ITA/TRAINING | 370,000 | - | 3,595 | 2,000 | - | 27,941 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | 403,536 | | |
| OJT | 25,000 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | 25,000 | |
| EMPLOYED WORKER | 25,000 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | 25,000 | |
| INTERNSHIPS | 50,000 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | 50,000 | |
| TRAINING SUPPORT | 10,000 | - | - | 2,000 | - | 1,000 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | 13,000 | |
| TRAINING STAFF | 338,879 | - | - | 55,653 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | 394,532 | |
| TOTAL TRAINING | 818,879 | - | 3,595 | 59,653 | - | 28,941 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | 911,068 | |
| OPERATING: | | | | | | | | | | | | | | | | | | | | | | | | | | |
| SUPPORTIVE SVS. | 4,000 | 181,476 | - | 3,000 | - | - | - | - | 90,320 | - | - | - | 255,805 | - | - | - | - | - | - | - | - | - | - | - | 534,601 | |
| DIRECT CHARGE (STAFF) | - | - | - | - | - | - | 57,628 | 25,700 | - | - | - | - | 432,577 | 92,740 | - | 42,021 | - | - | 53,003 | 27,278 | - | - | 57,791 | - | 783,737 | |
| ECKERD | 15,000 | 584,524 | - | 30,000 | - | - | - | - | 88,883 | - | - | - | - | - | - | - | - | 85,080 | 27,658 | - | - | - | - | - | 831,145 | |
| DEO STAFF TRAVEL | - | - | - | - | 2,000 | - | - | - | - | 3,000 | 6,000 | - | - | - | - | - | - | - | - | - | - | - | - | - | 11,000 | |
| OPERATING | - | - | - | - | 2,000 | - | - | 17,302 | - | 10,000 | 8,000 | 118,300 | - | - | 4,593 | - | 3,000 | - | - | - | - | - | - | 32,180 | 195,375 | |
| TOTAL OPERATING | 19,000 | 766,000 | - | 33,000 | 4,000 | - | 57,628 | 43,002 | 179,203 | 13,000 | 14,000 | 118,300 | 688,382 | 92,740 | 4,593 | 42,021 | 88,080 | 27,658 | 53,003 | 27,278 | - | 57,791 | 32,180 | - | 2,360,857 | |
| PROGRAM SUPPORT: | | | | | | | | | | | | | | | | | | | | | | | | | | |
| FACILITIES | 30,986 | 77,430 | 1,194 | 12,966 | 7,859 | - | 9,204 | 7,026 | 5,481 | 62,113 | 10,891 | - | 74,338 | 15,388 | - | 9,204 | - | 8,994 | 3,162 | 2,740 | 5,481 | 11,593 | - | - | 355,251 | |
| PROGRAM | 128,493 | 135,219 | - | 14,760 | 613 | 4,438 | 6,595 | 27,482 | 12,978 | - | - | - | 105,566 | 14,222 | 704 | 6,444 | - | - | 8,128 | 4,183 | - | 1,778 | - | - | - | 471,603 |
| INFORMATION TECHNOLOGY | 98,037 | 103,169 | - | 11,262 | 468 | 3,386 | 6,743 | 5,031 | 20,968 | 1,521 | 1,638 | - | 80,545 | 10,851 | 537 | 4,917 | - | - | 6,202 | 3,192 | - | 1,357 | - | - | - | 359,822 |
| OUTREACH | 68,615 | 72,206 | - | 7,882 | 328 | 2,370 | 3,521 | 14,675 | 5,784 | 1,146 | - | - | 56,372 | 7,595 | 376 | 3,441 | - | - | 4,340 | 2,234 | - | 949 | - | - | - | 251,834 |
| BUSINESS | 151,817 | - | - | 17,439 | - | 5,244 | - | 7,792 | 32,470 | 12,797 | - | - | 284,494 | 16,804 | 832 | 7,614 | - | - | 9,604 | 4,942 | - | 2,101 | - | - | - | 553,950 |
| SELF SERVICES | 117,461 | - | - | 13,493 | - | 4,057 | - | 6,028 | 25,122 | 9,901 | - | - | 220,112 | 13,001 | 644 | 5,991 | - | - | 7,430 | 3,824 | - | 1,625 | - | - | - | 428,590 |
| CAREER SERVICES | 204,615 | - | - | 23,504 | - | 7,068 | - | 10,501 | 43,762 | 17,248 | - | - | 383,432 | 22,648 | 1,122 | 10,262 | - | - | 12,944 | 6,661 | - | 2,831 | - | - | - | 746,597 |
| TOTAL PROGRAM SUPPORT | 800,023 | 388,023 | 1,194 | 100,706 | 9,068 | 26,563 | 15,947 | 46,495 | 169,960 | 122,342 | 13,675 | - | 1,204,859 | 100,508 | 4,216 | 47,773 | - | 8,994 | 51,810 | 27,777 | 5,481 | 22,234 | - | - | 3,167,648 | |
| TOTAL EXPENDITURES | 1,637,902 | 1,154,023 | 4,789 | 193,359 | 13,068 | 55,504 | 73,575 | 89,497 | 349,163 | 135,342 | 27,675 | 118,300 | 1,893,241 | 193,248 | 8,809 | 89,794 | 88,080 | 36,652 | 104,812 | 55,054 | 5,481 | 80,025 | 32,180 | - | 6,439,573 | |
| ADMIN POOL | 153,516 | 31,125 | 418 | 14,730 | 953 | 5,065 | 6,552 | 8,258 | 15,649 | 10,571 | 2,233 | 11,584 | 178,744 | 17,824 | 863 | 8,201 | 8,625 | 495 | 9,871 | 5,391 | - | 7,279 | 3,151 | - | - | 501,101 |
| GENERAL POOL | 58,508 | 11,862 | 159 | 5,614 | 363 | 1,931 | 2,497 | 3,148 | 5,954 | 4,029 | 851 | 4,415 | 68,122 | 6,793 | 329 | 3,126 | 3,287 | 189 | 3,762 | 2,055 | - | 2,774 | 1,201 | - | - | 190,976 |
| TOTAL INDIRECT COST RATE | 212,024 | 42,988 | 577 | 20,343 | 1,316 | 6,996 | 9,049 | 11,406 | 21,613 | 14,600 | 3,085 | 15,999 | 246,866 | 24,618 | 1,191 | 11,327 | 11,912 | 684 | 13,634 | 7,446 | - | 10,053 | 4,352 | - | 692,079 | |
| BALANCE | 278,932 | 119,461 | 22,952 | 164,740 | 16,503 | (0) | 13,344 | (0) | 473,936 | 58,135 | 502 | 5,701 | 0 | 182,541 | 0 | (0) | 0 | 216,897 | 0 | 0 | 0 | 234,010 | 426,679 | - | 2,214,332 | |
| INDIRECT RATE CALCULATION | | | | | | | | | | | | | | | | | | | | | | | | | | |
| DIRECT TOTAL COSTS | 1,637,902 | 1,154,023 | 4,789 | 193,359 | 13,068 | 55,504 | 73,575 | 89,497 | 349,163 | 135,342 | 27,675 | 118,300 | 1,893,241 | 193,248 | 8,809 | 89,794 | 88,080 | 36,652 | 104,812 | 55,054 | - | 80,025 | 32,180 | - | 6,434,092 | |
| LESS: LEASES | (55,196) | (70,172) | (523) | (9,940) | (3,338) | (3,775) | (6,670) | (5,159) | (10,151) | (27,386) | (4,867) | - | (67,913) | (11,226) | - | (6,042) | - | (3,940) | (4,006) | - | - | (5,694) | - | - | - | (296,000) |
| SUBAWARD (ECKERDS) | (15,000) | (766,000) | - | (33,000) | - | - | - | - | (179,203) | - | - | - | - | - | - | - | - | (27,658) | - | - | - | - | - | - | (1,020,861) | |
| TOTAL MTDC | 1,567,706 | 317,851 | 4,266 | 150,420 | 9,729 | 51,729 | 66,905 | 84,338 | 159,809 | 107,954 | 22,808 | 118,300 | 1,825,328 | 182,022 | 8,809 | 83,752 | 88,080 | 5,054 | 100,806 | 55,054 | - | 74,331 | 32,180 | - | 5,117,231 | |

| BUDGET/EXPENDITURES SUMMARY 7/1-12/31/22 | | | | | | | |
|--|------------------------|-----------|--------------|--------------|---------|--------|-----|
| Fund | Contract | Budget | Expenditures | Balance | % Spent | % ITA | WEX |
| ADULT | ITA/Training | 370,000 | 63,730.60 | 306,269.40 | 17.22% | | |
| | 99OJT | 25,000 | 3,439.48 | 21,560.52 | 13.76% | | |
| | Employed Worker | 25,000 | 1,830.00 | 23,170.00 | 7.32% | | |
| | Internships | 50,000 | 13,169.64 | 36,830.36 | 26.34% | | |
| | Training support svcs. | 10,000 | 2,437.02 | 7,562.98 | 24.37% | | |
| | Training staff | 338,879 | 114,720.74 | 224,158.26 | 33.85% | | |
| | Eckerd | 15,000 | 7,526.58 | 7,473.42 | 50.18% | | |
| | Sup Svcs./Operating | 4,000 | 2,973.33 | 1,026.67 | 74.33% | | |
| | Admin | 153,516 | 52,003.11 | 101,512.89 | 33.87% | | |
| | General | 58,508 | 18,508.63 | 39,999.37 | 31.63% | | |
| | Overhead | 769,037 | 317,601.83 | 451,435.17 | 41.30% | | |
| | Facilities | 30,986 | 16,867.88 | 14,118.12 | 54.44% | | |
| | Unobligated | 278,932 | - | 278,932.00 | 0.00% | | |
| | | 2,128,858 | 614,808.84 | 1,514,049.16 | 28.88% | 35.42% | |
| DW | ITA/Training | 2,000 | - | 2,000.00 | 0.00% | | |
| | Training support svcs. | 2,000 | - | 2,000.00 | 0.00% | | |
| | Training staff | 55,653 | 45,411.49 | 10,241.51 | 81.60% | | |
| | Eckerd | 30,000 | 14,836.57 | 15,163.43 | 49.46% | | |
| | Admin | 14,730 | 15,413.93 | (683.93) | 104.64% | | |
| | General | 5,614 | 5,486.04 | 127.96 | 97.72% | | |
| | Overhead | 88,340 | 103,455.00 | (15,115.00) | 117.11% | | |
| | Operating/SS | 3,000 | 1,285.02 | 1,714.98 | 42.83% | | |
| | Facilities | 12,366 | 6,731.86 | 5,634.14 | 54.44% | | |
| | Unobligated | 164,740 | - | 164,740.00 | 0.00% | | |
| | | 378,443 | 192,619.91 | 185,823.09 | 50.90% | 25.63% | |
| Rural | ITA/Training | 27,941 | 11,258.40 | 16,682.60 | 40.29% | | |
| | Training support svcs. | 1,000 | - | 1,000.00 | 0.00% | | |
| | Admin | 5,065 | 2,466.01 | 2,598.99 | 48.69% | | |
| | General | 1,931 | 877.69 | 1,053.31 | 45.45% | | |
| | Overhead | 26,563 | 13,829.07 | 12,733.93 | 52.06% | | |
| | | 62,500 | 28,431.17 | 34,068.83 | 45.49% | | |
| Wagner | Admin | 10,843 | 6,642.14 | 4,200.86 | 61.26% | | |
| Peyser | General | 4,132 | 2,364.03 | 1,767.97 | 57.21% | | |
| | Overhead | 63,013 | 44,767.10 | 18,245.90 | 71.04% | | |
| | Operating | 10,000 | 2,393.74 | 7,606.26 | 23.94% | | |
| | Facilities | 62,113 | 33,812.26 | 28,300.74 | 54.44% | | |
| | Staff trv | 3,000 | 239.60 | 2,760.40 | 7.99% | | |
| | Unobligated | 54,976 | - | 54,976.00 | 0.00% | | |
| | | 208,077 | 90,218.87 | 117,858.13 | 43.36% | | |
| SNAP | Admin | 17,824 | 11,943.44 | 5,880.56 | 67.01% | | |
| | General | 6,793 | 4,250.84 | 2,542.16 | 62.58% | | |
| | Overhead | 85,120 | 68,678.03 | 16,441.97 | 80.68% | | |
| | Facilities | 15,388 | 8,376.57 | 7,011.43 | 54.44% | | |
| | Staff | 92,740 | 47,535.63 | 45,204.37 | 51.26% | | |
| | Unobligated | 182,541 | - | 182,541.00 | 0.00% | | |
| | | 400,406 | 140,784.51 | 259,621.49 | 35.16% | | |

| BUDGET/EXPENDITURES SUMMARY 7/1-12/31/22 | | | | | | | |
|--|--------------|-----------|--------------|------------|--------------|---------|-----|
| Fund | Contract | Budget | Expenditures | Balance | % Spent | % ITA | WEX |
| WTP | Sup. Svs. | 255,805 | 86,872.52 | 168,932.48 | 33.96% | | |
| | Admin | 178,744 | 69,195.44 | 109,548.56 | 38.71% | | |
| | General | 68,122 | 24,627.62 | 43,494.38 | 36.15% | | |
| | Overhead | 1,130,521 | 440,163.98 | 690,357.02 | 38.93% | | |
| | Facilities | 74,338 | 40,544.13 | 33,793.87 | 54.54% | | |
| | Staff | 432,577 | 230,927.30 | 201,649.70 | 53.38% | | |
| | | | 2,140,107 | 892,330.99 | 1,247,776.01 | 41.70% | |
| Hurricane Ian | Admin | 8,722 | 8,721.68 | - | 100.00% | | |
| | General | 3,104 | 3,104.16 | 0.00 | 100.00% | | |
| | Overhead | 42,645 | 42,644.85 | (0.00) | 100.00% | | |
| | Facilities | 3,825 | 3,824.91 | - | 100.00% | | |
| | Staff | 25,411 | 25,411.46 | - | 100.00% | | |
| | Operating | 17,196 | 17,195.94 | - | 100.00% | | |
| | | | 100,903 | 100,903.00 | - | 100.00% | |
| DVOP | Admin | 2,233 | 1,581.87 | 651.13 | 70.84% | | |
| | General | 851 | 563.01 | 287.99 | 66.16% | | |
| | Overhead | 2,785 | 3,619.96 | (834.96) | 129.98% | | |
| | Operating | 8,000 | 3,853.88 | 4,146.12 | 48.17% | | |
| | Facilities | 10,891 | 5,928.62 | 4,962.38 | 54.44% | | |
| | Staff travel | 6,000 | 4,624.25 | 1,375.75 | 77.07% | | |
| | Unobligated | 502 | - | 502.00 | 0.00% | | |
| | | | 31,262 | 20,171.59 | 11,090.41 | 64.52% | |
| LVER | Admin | 953 | 581.72 | 371.28 | 61.04% | | |
| | General | 363 | 207.04 | 155.96 | 57.04% | | |
| | Overhead | 1,409 | 1,494.72 | (85.72) | 106.08% | | |
| | Operating | 2,000 | 849.51 | 1,150.49 | 42.48% | | |
| | Facilities | 7,659 | 4,169.16 | 3,489.84 | 54.43% | | |
| | Staff travel | 2,000 | 929.88 | 1,070.12 | 46.49% | | |
| | Unobligated | 16,503 | - | 16,503.00 | 0.00% | | |
| | | | 30,887 | 8,232.03 | 22,654.97 | 26.65% | |
| Apprenticeship Navigator | Admin | 5,391 | 2,247.22 | 3,143.78 | 41.68% | | |
| | General | 2,055 | 799.82 | 1,255.18 | 38.92% | | |
| | Overhead | 25,037 | 12,857.05 | 12,179.95 | 51.35% | | |
| | Facilities | 2,740 | 1,491.71 | 1,248.29 | 54.44% | | |
| | Staff | 27,277 | 8,975.34 | 18,301.66 | 32.90% | | |
| | | | 62,500 | 26,371.14 | 36,128.86 | 42.19% | |
| TAA | Training | 3,595 | 3,595.00 | - | 100.00% | | |
| | Admin | 418 | 403.55 | 14.45 | 96.54% | | |
| | General | 159 | 143.63 | 15.37 | 90.33% | | |
| | Facilities | 1,194 | 650.24 | 543.76 | 54.46% | | |
| | Unobligated | 22,952 | - | 22,952.00 | 0.00% | | |
| | | | 28,318 | 4,792.42 | 23,525.58 | 16.92% | |

| BUDGET/EXPENDITURES SUMMARY 7/1-12/31/22 | | | | | | | |
|--|------------------|---------|--------------|-------------|---------|-------|-----|
| Fund | Contract | Budget | Expenditures | Balance | % Spent | % ITA | WEX |
| Rapid Response | Admin | 9,871 | 2,600.10 | 7,270.90 | 26.34% | | |
| | General | 3,762 | 925.41 | 2,836.59 | 24.60% | | |
| | Overhead | 48,648 | 15,719.05 | 32,928.95 | 32.31% | | |
| | Facilities | 3,162 | 1,644.71 | 1,517.29 | 52.01% | | |
| | Staff | 53,003 | 11,152.37 | 41,850.63 | 21.04% | | |
| | | 118,446 | 32,041.64 | 86,404.36 | 27.05% | | |
| Recovery Navigator | Admin | 8,201 | 8,099.52 | 101.48 | 98.76% | | |
| | General | 3,126 | 2,882.73 | 243.27 | 92.22% | | |
| | Overhead | 38,569 | 46,421.47 | (7,852.47) | 120.36% | | |
| | Facilities | 9,204 | 5,010.64 | 4,193.36 | 54.44% | | |
| | Staff | 42,021 | 32,781.70 | 9,239.30 | 78.01% | | |
| | | 101,121 | 95,196.06 | 5,924.94 | 94.14% | | |
| Reentry Navigator | Admin | 6,552 | 3,628.97 | 2,923.03 | 55.39% | | |
| | General | 2,497 | 1,291.60 | 1,205.40 | 51.73% | | |
| | Overhead | 6,743 | 3,333.57 | 3,409.43 | 49.44% | | |
| | Facilities | 9,204 | 5,010.64 | 4,193.36 | 54.44% | | |
| | Staff | 57,628 | 29,572.85 | 28,055.15 | 51.32% | | |
| | Unobligated | 13,343 | - | 13,343.00 | 0.00% | | |
| | | 95,967 | 42,837.63 | 53,129.37 | 44.64% | | |
| Unrestricted | Admin | 3,151 | 5,261.81 | (2,110.81) | 166.99% | | |
| | General | 1,201 | 1,872.75 | (671.75) | 155.93% | | |
| | Operating | 32,180 | 51,853.88 | (19,673.88) | 161.14% | | |
| | Unobligated | 426,680 | - | 426,680.00 | 0.00% | | |
| | | 463,212 | 58,988.44 | 404,223.56 | 12.73% | | |
| Youth Buid #4 | Admin | 15,649 | 2,694.32 | 12,954.68 | 17.22% | | |
| | General | 5,964 | 958.95 | 5,005.05 | 16.08% | | |
| | Eckerd | 88,883 | 34,066.30 | 54,816.70 | 38.33% | | |
| | Eckerd Sup. Svs. | 90,320 | 29,710.00 | 60,610.00 | 32.89% | | |
| | Facilities | 5,481 | 2,983.44 | 2,497.56 | 54.43% | | |
| | Overhead | 164,479 | - | 164,479.00 | 0.00% | | |
| | Unobligated | 473,936 | - | 473,936.00 | 0.00% | | |
| | | 844,712 | 70,413.01 | 774,298.99 | 8.34% | | |
| Youth Build #3 | Admin | 495 | 609.75 | (114.75) | 123.18% | | |
| | General | 189 | 217.02 | (28.02) | 114.83% | | |
| | Eckerd | 27,658 | 21,043.16 | 6,614.84 | 76.08% | | |
| | Facilities | 8,994 | 4,895.89 | 4,098.11 | 54.44% | | |
| | Unobligated | 216,896 | - | 216,896.00 | 0.00% | | |
| | | 254,232 | 26,765.82 | 227,466.18 | 10.53% | | |
| Summit | Admin | 12,004 | 12,004.35 | - | 100.00% | | |
| | General | 4,273 | 4,272.52 | - | 100.00% | | |
| | Operating | 118,300 | 118,300.00 | - | 100.00% | | |
| | Unobligated | 5,423 | - | 5,423.00 | 0.00% | | |
| | | 140,000 | 134,576.87 | 5,423.00 | 96.13% | | |

| BUDGET/EXPENDITURES SUMMARY 7/1-12/31/22 | | | | | | | |
|--|------------------|-----------|--------------|-------------|---------|--------|--------|
| Fund | Contract | Budget | Expenditures | Balance | % Spent | % ITA | WEX |
| Youth | Admin | 31,125 | 36,484.67 | (5,359.67) | 117.22% | | |
| | General | 11,862 | 12,985.40 | (1,123.40) | 109.47% | | |
| | Eckerd | 584,524 | 282,268.19 | 302,255.81 | 48.29% | | |
| | Eckerd Sup. Svs. | 181,476 | 42,528.79 | 138,947.21 | 23.43% | | |
| | Overhead | 310,593 | 290,633.73 | 19,959.27 | 93.57% | | |
| | Facilities | 77,430 | 18,852.85 | 58,577.15 | 24.35% | | |
| | Unobligated | 119,462 | - | 119,462.00 | 0.00% | | |
| | | 1,316,472 | 683,753.63 | 632,718.37 | 51.94% | | 11.87% |
| REA | Admin | 7,279 | 7,312.52 | (33.52) | 100.46% | | |
| | General | 2,774 | 2,602.63 | 171.37 | 93.82% | | |
| | Overhead | 10,641 | 42,252.80 | (31,611.80) | 397.08% | | |
| | Facilities | 11,593 | 6,311.12 | 5,281.88 | 54.44% | | |
| | Staff | 57,791 | 28,087.50 | 29,703.50 | 48.60% | | |
| | Unobligated | 234,010 | - | 234,010.00 | 0.00% | | |
| | | 324,088 | 86,566.57 | 237,521.43 | 26.71% | | |
| United Health | Admin | 8,625 | - | 8,625.00 | 0.00% | | |
| | General | 3,287 | - | 3,287.00 | 0.00% | | |
| | Eckerd | 85,080 | - | 85,080.00 | 0.00% | | |
| | Operating | 3,000 | - | 3,000.00 | 0.00% | | |
| | | 99,992 | - | 99,992.00 | 0.00% | | |
| RWB 6 | Operating | 5,481 | - | 5,481.00 | 0.00% | | |
| Mobile Repair | Operating | 4,592 | - | 4,592.00 | 0.00% | | |
| | Admin | 863 | - | 863.00 | 0.00% | | |
| | General | 329 | - | 329.00 | 0.00% | | |
| | Overhead | 4,216 | - | 4,216.00 | 0.00% | | |
| | | 10,000 | - | 10,000.00 | 0.00% | | |
| Total Budget | | 9,345,984 | 3,350,804 | 5,995,180 | 35.85% | 33.07% | 11.87% |



RECORD OF ACTION/APPROVAL

Consortium Meeting, Wednesday March 1, 2023
Executive Committee Meeting, Wednesday, March 1, 2023
Career Center Committee Meeting, Tuesday, February 7, 2023

TOPIC/ISSUE:

Release of the Invitation to Negotiate (ITN) for One Stop Operator services.

BACKGROUND:

Pursuant to the Workforce Innovation and Opportunity Act all local workforce development boards are required to procure a One Stop Operator as defined in the WIOA Final Regulations section 678.600 through 678.635. CareerSource will not compete under an ITN, therefore we will release an ITN to procure services.

POINTS OF CONSIDERATION:

Procurement standards require that all service provider contracts are opened for bid at minimum every four years. This ITN will solicit proposals for the execution of the determined roles and responsibilities of the One Stop Operator as defined and approved by the Executive Committee and full board. The awarded contract will be for a one (1) year term renewable up to three terms.

The ITN is scheduled for Public Notice on March 9th and 10th, 2023. Other relevant dates are:

- ITN Release: March 13, 2023
- Expression of Interest due: March 23, 2023
- ITN full submission due: April 27, 2023

STAFF RECOMMENDATIONS:

Requesting approval for authority to release the One Stop Operator ITN on March 13, 2023 after the appropriate Public Notice period of March 9th and 10th.

COMMITTEE ACTION:

Lanny Mathis made a motion to approve the release of the One Stop Operator ITN. Pat Reddish seconded the motion. Motion carried.

BOARD ACTION:



Enterprise Center
3003 SW College Road, Suite 205
Ocala, FL 34474-6252

Phone: 352-873-7939
Fax: 352-873-7910
www.careersourceclm.com

One Stop Operator

Directions for Completion and Submittal

Invitation to Negotiate

Public Notice: March 9, 2023

ITN Release Date: March 13, 2023

Expression of Interest (EOI) Due: March 23, 2023

Notification of Qualification: March 30, 2023

Question & Answer Period: March 31, 2023 – April 13, 2023

Posting of Questions and Answers: March 31, 2023 – April 13, 2023

ITN Submission Due: April 27, 2023

Staff Review: April 28, 2023 – May 5, 2023

Management Team Interviews: May 8, 2023 – May 12, 2023

Executive Committee Action: May 31, 2023

Final Board Action: June 7, 2023

Initial Contract Period: July 1, 2023 – June 30, 2024

PURPOSE:

CareerSource Citrus Levy Marion (hereafter referred to as CSCLM) issues this Invitation to Negotiate (ITN) to solicit innovative approaches to One Stop operations under the provisions of the Workforce Innovation and Opportunity Act in Local Workforce Development Area 10 which is made up of Citrus, Levy, and Marion Counties. CSCLM intends to be as inclusive as possible in the solicitation. The aim is to receive a wide variety of innovative proposals that best meet the needs of the area at large.

The Workforce Innovation and Opportunity Act (WIOA, Public Law 113-128) provides the framework for a national workforce preparation system that is flexible, responsive, customer-focused and locally managed. In Citrus, Levy, and Marion counties, CSCLM envisions a system that meets the needs of residents and businesses alike. The goal of programs under the Act is to increase employment, job retention, earnings and develop the work potential of the residents within our counties.

DESCRIPTION OF CSCLM ONE STOP SYSTEM:

CSCLM delivers all programs and services to customers through its One Stop System with exception of Youth services. This system is developed around both a “physical front door” and through “electronic access”. The system includes connectivity between the various partners and service providers to create a no wrong door approach to service delivery. The goal of the One Stop System is to provide full-service, staffed sites, offering services which assist individuals in obtaining employment through an individualized mix of core employment and training-related activities. This ITN is focused on coordination of services and operation of the One Stop career centers in our three counties.

CSCLM reserves the right to select none of the Responses made to this ITN. Nothing obligates CSCLM to pay the cost of Response preparation and submission. Final contract approval with the selected organization(s) for operational services will be subject to negotiation.

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PART I: GENERAL INSTRUCTIONS

Deadline for Receipt of Responses

Full Responses to this ITN must be **received by 4:00 p.m., April 27, 2023**. Responses received after that date and time will not be considered. Please note the time-table listed on the front page of these instructions. Crucial dates to remember are:

Expression of Interest Due: March 23, 2023

ITN Submission Due: April 27, 2023

Electronically transmitted documents will not be accepted. Respondents are responsible for ensuring that Responses meet all the requirements set forth in this ITN, and for ensuring that Responses are received on time.

Where to Mail EOI and Full ITN Responses & Number of Copies Needed:

Submit **one (1) original (marked “Original”)** and **one (1) electronic copy on a flash drive** to:

**Cathy Galica
CareerSource Citrus Levy
Marion
3003 SW College Road, Suite
205
Ocala, Florida 34474**

Contract Period

Any response submitted should be based upon a one-year period of performance. Contracts will be renewable up to a total of a four-year period of time (three renewals after initial contract), based upon performance, and will be renegotiated annually.

One Stop System

A list of current Career Centers and Participating Partners is noted in Attachment 3. The One Stop Operator will work under the direction of the local workforce development board and will work closely with partner programs and agencies to coordinate a cohesive 'system' that involves all programs and partners extending beyond workforce-only services.

Technical Questions

Any technical questions regarding how to respond to any portion of this ITN should be directed to cgalica@careersourceclm.com. All questions will be gathered, answered, and distributed to all interested and qualifying parties via email. Only qualifying parties will receive responses after the Expression of Interest period. **Questions will not be answered on an individual basis.**

One Stop Center Review

Career Center reviews/tours will be made available to interested and qualified respondents. Respondents that wish to review the Career Centers must state so in their Expression of Interest letter. Times and dates of requested reviews will be mutually decided upon between the respondent and CSCLM management.

Who May Apply

All governmental and non-governmental agencies, whether operated for profit or nonprofit, may apply as well as consortiums of multiple agencies. If a consortium is applying, one agency must be labeled as the lead agency. Each respondent must be a legally recognized entity that has received appropriate licenses prior to submittal of the response.

Exception: 20 CFR 678.600 (d) Elementary schools and secondary schools are not be eligible as one-stop operators, except that nontraditional public secondary school such as a night school, adult school, or an area career and technical education school may be selected.

No response will be accepted from an entity if it has not been pre-qualified during the **Expression of Interest** period and if:

- The entity has been debarred, suspended, or otherwise determined to

- be ineligible to receive funds by an action of any governmental agency; or
- The entity has not complied with an official order of any agency of the State of Florida or the United States Department of Labor to repay disallowed costs incurred during its conduct of projects or services; or
- The entity's previous contract(s) with the CSCLM have been terminated for cause; or
- The entity's name appears on the State's convicted vendor list; or
- The entity appears on the Scrutinized Companies that Boycott Israel list or is engaged in a boycott of Israel,
- The entity appears on the Scrutinized Companies with Activities in Sudan List
- The entity appears on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List
- The entity is engaged in business operations in Cuba or Syria
- The entity appears on the convicted vendor list following a conviction for a public entity crime
- The entity appears on the state's discriminatory vendor list
- For any other good and just causes.

Profit charged by private for-profit entities must be fair and reasonable. Such profit will be reviewed in conjunction with the requirements of 2 CFR Section 200.323 U.S. Office of Management and Budget.

Each organization that submits a response must be capable of supporting its own operation. Payment is made on a performance driven/cost reimbursement basis after the organization(s) selected submits invoices.

Invoicing is anticipated to be on a quarterly basis.

Authorized Signatures and Primary Contact

The individual who is legally authorized to submit the Response for the respondent must sign the response.

If a single response is submitted on behalf of more than one organization, a lead agency should be designated by all parties to provide all the information requested in this section.

Expression of Interest (EOI) Evaluation

Expression of Interest documents will be reviewed by CSCLM staff.

Prior to the continuation in the ITN process, a full determination will be made about each respondent and will include the follow components:

- Evidence of adequate financial resources or the ability to obtain them;
- A qualified management team;
- The ability to meet the program design specifications at a reasonable cost;
- A satisfactory record of past performance in related areas;
- A satisfactory record of business ethics, integrity, and fiscal accountability;
- The necessary organizational experience and operational controls;
- The technical skills to perform the work;
- Quantifiable performance history in workforce development;
- Thorough understanding of the Workforce Innovation and Opportunity Act and applicable regulations

The respondent is responsible for including information in the Expression of Interest that will allow CSCLM staff to evaluate these matters. All respondents will be notified of their qualification status on **March 30, 2023**.

ITN Evaluation

The Review Tool that the Workforce staff will be using to perform the review and rating is included as Attachment 5 in this ITN packet.

The review of the written response to this ITN will be conducted by CSCLM staff with completion scheduled for **April 28, 2023 – May 5, 2023**. All respondents who are considered to be responsive to the ITN directions may be scheduled for Management Team interviews at CSCLM's discretion. These will occur **May 8, 2023 – May 12, 2023**, if required.

Results of the review process will be presented to the CSCLM Executive Committee and is scheduled for completion **May 31, 2023**.

Final selection will be presented at the Board Meeting on **June 7, 2023**.

Cost Reimbursement/Performance Based Contract

CSCLM intends to award a cost reimbursement/performance-based contract(s) to one or more organization(s) that provide operation services. The final contract(s) will contain:

- Provisions for contract cancellation or re-negotiation based on the performance and level of service provided.

- Expected measurable performance goals.
- Details how funds will be tied to services rendered.

Monitoring of performance against outcome measures will be conducted annually by CSCLM's third party monitoring firm. Failure to achieve desired outcomes may result in contract cancellation or re-negotiation.

Method of Solicitation

Request for Proposals (RFP) are based on a defined level of service with cost being a primary factor in contract awards.

Section 287.057 of the Florida Statutes provides that in certain circumstances where an agency determines "that an invitation to bid or an RFP will not result in the best value", it can opt to use an Invitation to Negotiate (ITN).

Because the decision making process will be a review of overall quality and value of each proposal, an Invitation to Negotiate will allow for us to achieve the goals of the Board and to interview the proposed operator team's key staff as part of our selection process so that we can make a decision based on overall ratings.

Stevens Amendment

The CareerSource Citrus Levy Marion One Stop Operator requirement under WIOA Section 121(d) is supported by the Employment and Training Administration of the U.S. Department of Labor as part of an award totaling \$8,090,111.00 with no percentage financed from non-governmental sources.

Appeal Procedures

Any organization that submits a Response to CSCLM will receive fair and unbiased consideration.

In accordance with the CSCLM regulations, respondents who are denied funding have the right to appeal. The following steps must be taken for organizations to appeal funding decisions.

Submit a letter of protest addressed to:

Brandon Whiteman, Chair
CareerSource Citrus Levy Marion
Enterprise Center
3003 SW College Rd, Suite 205
Ocala, FL 34474

Within ten (10) days of the final decision.

*****Remainder of Page Left Blank Intentionally*****

PART II

Expression of Interest Package

PART II: EXPRESSION OF INTEREST PACKAGE

A pre-qualification review will be conducted regarding all expression of interest respondents for the One Stop Operator services sought through this ITN.

This Expression of Interest Package must be submitted in its entirety.

CONTENTS OF PACKAGE:

Cover Page: (Attachment 1)

- Include Legal Corporate Name and DBA if applicable
- Corporate Address and Telephone number

Certifications: (Attachment 2)

- Drug-Free Workplace Certification
- Debarment & Suspension Certification
- Certification Regarding Lobbying Activities
- Sworn Statement on Public Entity Crimes

Additional Documentation:

- Letter stating your interest
- List of officers and members of the Board of Directors if applicable

Business Papers:

For Private Incorporated Organizations:

- Copy of the most recent annual/audit report on file with the appropriate state agency, or
- Copy of Articles of Incorporation and Charter Number
- State of Incorporation

For Private Unincorporated Organizations:

- Copy of appropriate business or occupational license

For Non-Profit Organizations:

- Copy of the most recent audit report or
- Copy of Articles of Incorporation and Charter Number
- State of Incorporation

Qualifications of Business:

- Resumes of Management and top Supervision Staff (Local and Corporate) that will be actively engaged.
- Summary (no longer than 4 pages, 12 font) of Business involvement in providing operational services as they relate to the contents of this ITN. List dates and locations.
- Supporting documentation as proof of ability to operate workforce programs. Include letters of recommendation from any workforce boards in which you may currently or have provided operational services.
- Listing of Organizational Experience, resume format.
- Organizational Chart that details flow, parent company, support levels.

EXPRESSION OF INTEREST DUE DATE: March 23, 2023 4:00 pm

SUBMISSION DUE DATE: April 27, 2023 4:00 pm

PART III

ITN

INSTRUCTIONS

**PART III: WORKFORCE INNOVATION and OPPORTUNITY ACT
ONE STOP OPERATOR
FULL ITN RESPONSE PACKAGE**

Program Parameters and Description of Services Sought

WIOA Section 121(d) establishes the requirement for the procurement of One Stop Operators in the workforce system. 20 CFR, Subpart D - sections 678.500 – 678.635 establishes the parameters of duties for such operators. It has been the decision of the CSCLM Board, based on these provisions, to seek the following services from the selected One Stop Operator.

- Review, develop, and enhance Memoranda of Understanding (MOU) with partnering programs, agencies and services to establish an integrated workforce 'system' that extends beyond basic workforce services (MOU copy - Attachment 4).
- Coordinate with senior management, key partners, and officials to review program delivery efficiencies and make recommendations of best practices and training options for continuous improvement via quarterly strategy meetings.
- Implementation of the current Strategic Plan into the everyday processes and procedures within the career centers.
- Develop, review and enhance standard operating procedures as they relate to the daily operations of the career centers and their associated programs.
- Provide input on competitive grant narratives for continued program development within the career centers.
- Oversee execution and implementation of developed MOUs within the career centers.
- Perform additional services at the option of the CSCLM board and management as relevant to the operations of the career centers. Additional services may include area skill gap reviews, labor market studies, cross-regional labor market/labor pool studies and comparisons.
- Be willing to coordinate with other workforce development boards and operators for 'regional' planning purposes.
- Review and discuss all recommendations that affect system partners with such partners prior to board review.
- Conduct **in-person** meetings at a minimum:
 - Propose a schedule of meetings at least monthly through-out the year in person or virtually.

- For planning and review sessions each July and August with mandatory and non- mandatory partners
- With the full board for the first meeting of each program year (first quarter of each program year in July, August, or September)
- With Career Center committee in the 3rd quarter of each program year.
- Provide a quarterly report on activities quarterly to be presented to committees and board

Attendance at all Committee meetings either in person when appropriate or virtually.

Format Requirements

Prepare the Response as follows:

Use the same topic headings, in the same order, as described in Response Outline, below.

- Answer all requests for data or information or mark the information “Not Applicable”.
- Use 12-point font.
- Copy all pages and forms on only one side of the page for hardcopy submissions.
- Attach all requested documentation to the back of the Response, and label it clearly.
- Number all pages of the Response, including the attachments.
- Submit an original, marked “Original”, and one (1) electronic copy on a flash drive.
- Response no later than **April 27, 2023 at 4:00 pm.**
- Hardcopy Responses should be clipped and not sent in binders.

WIOA One Stop Operator Response Outline and Required Content

All Responses must follow the outline below.

1. Cover Page

Complete the cover page provided in **Attachment 1**.

2. Table of Contents

Paginate the complete document and provide a table of contents indicating the beginning page for each section and major subsections of the Response, including each attachment. Provide section dividers that relate to the table of contents and submit clipped copies and original. **Do not** have professionally bound or put in 3-ring binders.

3. Response Summary

Summarize the Response, including any unique or innovative aspects that may set your organization and/or your Response apart from others. If the Response represents a joint submittal by more than one agency or organization, list all partners and briefly describe the role of each in service delivery.

4. Budget

The anticipated budget for One Stop Operator Services is \$75,000.00 per year. The budget is negotiable based on proposed services and performance.

List the individual with the authority to negotiate and bind the respondent to a contract. Include: name, title, organization represented, full mailing address, full e-mail address, if available, telephone number, and fax number.

List the individual who is usually available to answer questions about the Response. Include: name, title, organization represented, full mailing address, full e-mail address, telephone number, and fax number.

5. Description of Organization and Staff Qualifications

Describe the organization's mission and history. What does your program intend to accomplish? Additionally, include the following:

- Recommended quarterly goals.
- Explanation of contributing factors of all coordinating organizations if your response includes more than one organization.
- How your organization will financially support the costs of the program until a reimbursement can be requested for actual program expenditures.
- A list of five references that includes agencies and individuals with first-hand knowledge about the organization's performance in regards to organizational operation. Each reference should include a current address and telephone number.

6. Work Plan, including plans for each of the following:

Describe how the organization will coordinate service delivery through CSCLM's One Stop centers and with the other employment and training partners in the three-county workforce area.

7. Goals/Objectives and Performance Levels:

Provide a narrative description of the goals that your program plans to address as well as how you plan to satisfy the deliverable listed in section III Program Parameters and Description of Services Sought.

8. Facilities:

Where will the program operate?

The operation of programs currently take place in Ocala, Lecanto and Chiefland. ***It is important to note that it is not assumed that One Stop Operator staff must occupy physical space within our One Stop career centers. All responses should state whether their proposal requires physical office space full-time, part-time or on an itinerate basis.***

9. Experience:

Outline your experience in facilitating workforce operations, programs and partnering agencies/programs. Provide a brief description, funding sources, and performance information. If you have not operated a One Stop career center in the past, outline programs that provide similar services in which you have been involved over the last three years.

10. Budget Narrative:

Provide an overall hourly rate and an estimate of total hours for services rendered based on your work plan. Final budgets will be developed during the negotiation period after final selection.

11. Reasonableness of Cost

Package is due no later than 4:00 pm on April 27, 2023.

PART IV

Attachments

ATTACHMENT 1

Cover Page

Organizational Information
Cover Page

Legal Organization Name: _____

Address: _____

Federal Tax ID Number (FEID): _____

Florida Tax ID Number: _____

Unemployment Insurance Number _____

Dun and Bradstreet Number: _____

CAGE Number (if applicable): _____

Primary Contact: _____

Title: _____

Phone Number: _____

E-Mail Address: _____

FOR WORKFORCE BOARD STAFF USE ONLY

Date Received: _____ **Time Received:** _____

Received by: _____

ATTACHMENT 2

Certifications

CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER MATTERS

1. The prospective primary participant certifies to the best of its knowledge and belief, that it, and its principals:
 - a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transaction by any federal department or agency;
 - b. Have not within a three (3) year period preceding this Response been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or Contract under a public transaction; violation of federal or state anti-trust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
 - c. Are not presently indicated for or otherwise criminally or civilly charged by a government entity (federal, state, or local) with commission of any of the offenses enumerated in 1b. above, of this certification; and
 - d. Have not, within a three (3) year period preceding this application/Response had one or more public transactions (federal, state, or local) terminated for cause or default.
2. That if the prospective primary participant is unable to certify to any statements in this certification, such prospective primary participant shall attach an explanation to the Response.

Name & Title of Authorized Representative

Signature

Date

**CERTIFICATION REGARDING
LOBBYING**

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, and officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal Contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal Contract, grant, loan, or cooperative agreement.
2. If any other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal Contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form--LL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
3. The undersigned shall require that the language of this certification can be included in the award documents for all subawards at all tiers (including Subcontracts, subgrants and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Contractor/Name of Certifying Official

Signature of Certifying Official

Date

CERTIFICATION REGARDING A DRUG-FREE WORKPLACE

I, _____, an authorized representative of the Contractor do hereby make the following certification with respect to the execution of responsibilities assigned to the WORKFORCE by the Workforce Innovation and Opportunity Act and WAGES, and the Drug-Free Workplace Act of 1988. The Contractor will:

- a. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the Contractor's workplace and specifying action that will be taken against employees for violation of such prohibition;
- b. Establish a drug-free awareness program to inform employees about:
 1. The dangers of drug abuse in the workplace;
 2. The Contractor's policy of maintaining a drug-free workplace;
 3. Any available drug counseling, rehabilitation, and employee assistance programs; and
 4. The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;
- c. Make it a requirement that each employee to be engaged in the performance of the Contract be given a copy of the statement required by paragraph (a) of this certification;
- d. Notify the employees in the statement required by paragraph (a) of this certification that, as a condition of employment under the grant, the employee will:
 1. Abide by the terms of the statement; and
 2. Notify the Contractor of any criminal drug statute conviction, for a violation occurring in the workplace, no later than five (5) days after such conviction; and
- e. Notify the WORKFORCE within ten (10) days after receiving notice under this subparagraph (d) (2), from an employee or otherwise receiving actual notice of such conviction;
- f. Take one of the following actions, within 30 days of receiving notice under the subparagraph (d)(2), with respect to any employee who is so convicted:
 1. Take appropriate personnel action against such an employee, up to and including termination; or

2. Require such employee to participate in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, Local health, law enforcement, or other appropriate agency;

g. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs (a), (b), (c), (d), (e), and (f).

The Contractor shall insert in the space provided below the site(s) for the performance of work done in connection with the specific Contract.

Place of Performance (street address, city, state, zip code and county)

Contractor _____

Street Address _____

City, State, ZIP Code _____

County _____

Signature of Certifying Official

Date

**SWORN STATEMENT UNDER SECTION 287/133(3)(A),
FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES**

**(To be signed in the presence of a notary public or
other officer authorized to administer oaths.)**

STATE OF

COUNTY OF

Before me, the undersigned authority, personally appeared _____, who, being by me first duly sworn, made the following statement:

**The business address of (Contractor) _____
_____ is _____
_____.**

**My relationship to (Contractor) _____
_____ is _____ (relationship
such as sole proprietor, partner, president, vice-president).**

- 3. I understand a public entity crime as defined in Section 287.133 of the Florida Statutes includes a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity in Florida or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid or Contract for goods or services to be provided to any public entity or such an agency or political subdivision and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.**
- 4. I understand "convicted" or "conviction" is defined by the statute to mean a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.**
- 5. I understand "affiliate" is defined by the statute to mean (1) a predecessor or successor of a person or a corporation convicted of a public-entity crime, or a person or a corporation convicted of a public entity crime, or (2) an entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime, or (3) those officers, directors, executives, partners, shareholders, employees, members and agents who are active in the management of an affiliate, or (4) a person or corporation who knowingly entered into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months.**

6. Neither the Contractor nor any officer, director, executive, partner, shareholder, employee, member or agent who is active in the management of the Contractor nor any affiliate of the Contractor has been convicted of a public entity crime subsequent to July 1, 1992.

(Draw a line through paragraph 6 if paragraph 7 below applies.)

7. There has been a conviction of a public entity crime by the Contractor, or an officer, director, executive, partner, shareholder, employee, member or agent of the Contractor who is active in the management of the Contractor or an affiliate of the Contractor. A determination has been made pursuant to Section 287.133(3) by order of the Division of Administrative Hearings that it is not in the public interest for the name of the convicted person or affiliate to appear on the convicted vender list. The name of the convicted person or affiliate is _____

A copy of the order of the Division of Administrative Hearings is attached to this statement.

(Draw a line through paragraph 7 if paragraph 6 above applies.)

Signature/Date: _____

Sworn to and subscribed before me in the state and county first

mentioned above on the _____ day of _____, 200_____.

Notary Public

(affix seal)

Notary Public Printed Name

ATTACHMENT 3

List Of Current Centers And Participating Partners

| | Lecanto | Chiefland | Ocala (14th Street) |
|--|----------------|------------------|----------------------------|
| WIOA Adult and Dislocated Worker Programs | x | x | x |
| Migrant and Seasonal Farm Worker Programs | referral | referral | referral |
| Indian and Native American Programs | referral | referral | referral |
| Job Corps | referral | referral | referral |
| Youth Services | x | x | x |
| Wagner-Peyser Programs | x | x | x |
| Adult Education | referral | referral | referral |
| Post-secondary Vocational Education | referral | referral | referral |
| Vocational Rehabilitation | referral | referral | referral |
| Older Worker Programs | referral | referral | x |
| Veterans Employment and Training Programs | x | x | x |
| Community Service Block Grant Activities | referral | referral | referral |
| Employment and Training Activities carried out by the Department of Housing and Urban Development | referral | referral | referral |
| Re-employment Insurance Programs | x | x | x |
| Food Stamp Employment and Training | x | x | x |
| Supportive Service-Child and Transportation | x | x | x |
| Employer Services - OJT; CWEX; WOTC; Employed Worker etc. | x | x | x |
| Welfare Transition | x | x | x |
| Staffing Services | referral | referral | referral |

ATTACHMENT 4

Memorandum of Understanding Template

MEMORANDUM OF UNDERSTANDING

Between

Citrus Levy Marion Regional Workforce Development Board, Inc.
DBA CareerSource Citrus Levy Marion
And

1. **Purpose of this Memorandum of Understanding**

The Workforce Innovation and Opportunity Act (WIOA) requires that a Memorandum of Understanding (MOU) be developed and executed between the local Workforce Development Board, in this case, CareerSource Citrus Levy Marion (CSCLM) and the Career Center Partners. This Act requires specific programs to make their services available through a one-stop delivery system and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSCLM and the One-Stop system partners to establish an agreement concerning the operations of the one-stop system and to establish the framework for providing services to employers, employees, job seekers and others needing workforce services.

Florida's one-stop delivery system, the CareerSource Network, is a locally-driven system which develops strategic partnerships and provides streamlined and integrated programs and services to the businesses and citizens of Florida.

Florida's strategic vision for WIOA implementation will be realized by accomplishing these three goals:

- Enhance alignment and market responsiveness of workforce, education and economic development systems through improved service integration that provides businesses with skilled, productive, and competitive talent and Floridians with employment, education, training, and support services that reduce welfare dependence and increase opportunities for self-sufficiency, high-skill and high-wage careers and lifelong learning.
- Promote accountable, transparent, and data-driven workforce investment through performance measures, monitoring and evaluation that informs strategies, drives operational excellence, leads to the identification and replication of best practices and empowers an effective and efficient workforce delivery system.
- Improve career exploration, educational attainment and skills training for in-demand industries and occupations for Florida youth that lead to enhanced employment, career development, credentialing and post-secondary education opportunities.

These objectives will be accomplished locally by providing all customers access to high- quality career centers within a one-stop system that connects them with the full range of services available in their communities, whether they are customers seeking to find jobs, build basic educational or occupational skills, earn a postsecondary certificate or degree, or obtain guidance on how to make career choices, or are businesses and employers seeking skilled workers.

The purpose of this MOU is to establish or enhance a cooperative working relationship between CSCLM and to define our respective roles and responsibilities in achieving the policy objectives.

2. **System Partners**

MOUs will be developed with system partner programs that are provided physically within the center, provided through cross-training of partner staff, or provided through direct linkage from technology. The partner programs and targeted population programs available in CSCLM will be:

Locally Operated by CSCLM through agreement with DEO

- WIOA Title I Adult, Dislocated Worker and Youth*
- WIOA Title III Wagner-Peyser*
- Veterans Employment and Training*
- Trade Act*
- Unemployment* (Primarily provided at State level)
- Temporary Assistance for Needy Families*
- Supplemental Nutrition Act Program (SNAP)

Locally Operated by CSCLM through agreement with DOL

- YouthBuild*

MOU Provided at State Level

- WIOA Title II Adult Education and Literacy*
- WIOA Title IV Vocational Rehabilitation*
- Carl Perkins Career and Technical Education*

MOU with CSCLM

- Title V Older Americans Act aka SSCEP*
- Job Corps*
- Community Action Agencies*
- Housing Authorities*
- Agencies serving individuals with disabilities
- Agencies serving youth with barriers to employment
- Early Learning Coalitions

- Homeless Continuum of Care organizations
 - Veteran Agencies
 - Economic Development
 - Support Service Providers
 - Others as determined to be beneficial to serving both employers and job seekers.
- * denotes those that are “required” partners

3. One-Stop System Description

As designated by CareerSource Florida on behalf of the Governor, CSCLM is the local workforce board and the regional planning area, under Title I of the WIOA. Currently CSCLM has been provided permission to provide and act as the One-Stop Operator and Career Services Provider.

The CSCLM area consists of the counties of Citrus, Levy and Marion with Career Centers located in Lecanto, Chiefland, and Ocala. The Ocala Career center located at 2703 NE 14th Street is the comprehensive center for CSCLM. A professional placement center is located at the College of Central Florida Campus in Ocala for specialized recruitment and placement of professionals throughout the region and in partnership with our training partners. CSCLM also has two mobile units to assist in providing services to remote and rural areas within the region.

All of our centers provide seamless access to workforce programs for both the job seeker and the employer. Our system is linked through Employ Florida, the State’s talent matching system, to provide a system wide approach for job seeking and job placement.

Our centers provide access to a multitude of services that can be obtained through either self-service or with assistance from staff. By blending and weaving our various funding streams we are able to provide services to customers without pushing a customer from program to program but handling in a customer driven manner based on individual strategies.

The One-Stop System is the result of the partnerships developed within our region that links the programs and services provided at the Career Centers and at other partner locations that provide the full complement of services needed by our customers.

This MOU will increase our ability to serve mutual customers, reduce duplication of efforts and expand our abilities to provide services throughout the One-Stop System either in one of our Career Centers, electronically at your location, or as an affiliate site.

4. General Responsibilities of One-Stop System Partners:

- The One-Stop System partner agrees to participate in joint planning, plan development, and modification of activities to result in:

- Continuous partnership building;
- Continuous planning responsive to State and Federal requirements;
- Responsive to specific local and economic conditions including employer needs;
- Solutions to common data collection and reporting needs;
- Make available to customers through the One-Stop System the services that are applicable to the partners programs
- Participate in the operation of the One-Stop System consistent with the agreed upon “service integration” following in the next part, number 5
- Participate in capacity building and staff development activities
- Insure that all partners and staff are cross-trained to understand programs and specific “service integration” goals as specified in the next part, number 5

5. Service Integration Plan and Goals:

CSCLM and

agree to the following:

6. Resource and Cost Sharing

This MOU between CSCLM and is an
agreement of

7. Data Access and Sharing

To facilitate integration of services, partners are encouraged to provide cross-access or protected information from systems of customer data within the applicable federal and state privacy laws and regulations governing the partner programs. All state and federal confidentiality regulations regarding the creation, maintenance and/or use of records shall be in effect. Client records and/or information may be shared among partners subject to these confidentiality requirements. Data sharing arrangements will be included in section 5.

Client information shall be shared solely for the purpose of eligibility, enrollment, referral, or provision of services. In carrying out their respective responsibilities, each party shall respect and abide by the confidentiality policies of the other parties.

8. Access for Individuals with Barriers to Employment

All One-Stop system partners will ensure access for individuals with barriers to employment and will offer priority for services to recipients of public assistance, other low-income individuals, or individuals who are basic skills deficient for individualized career services and training services

funded with WIOA adult funds.

9. Non-Discrimination

As required by federal and state law, participating agencies will assure that no person shall be discriminated against in consideration for or receipt of partner agency services and/or employment based upon sex, disability, race, color, age, religion, national origin, political affiliation, belief, veteran status, familial status, sexual orientation, gender identity, pregnancy, or genetic information.

The One-Stop system partner will assure compliance with the Americans with Disabilities Act of 1990, and its Amendments, which prohibits discrimination on the basis of disability, as well as applicable regulations and guidelines issued pursuant to the ADA.

Partners agree to comply fully with the WIOA, Title VII of the civil rights act of 1964, the Age Discrimination Act of 1975, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities, and The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and 29 CFR Part 37 and all other regulations implementing the aforementioned laws.

10. Duration, Modification, and Termination of the Partner MOU

It is mutually understood that this MOU shall not become effective until signed. This MOU shall remain in effect until modified, extended or terminated in accordance with this section. However, this MOU shall be reviewed every two (2) years. This MOU may be amended at any time in writing and will be effective when signed by both entities.

Either party may cancel its participation in whole or in part at any time with thirty (30) days written notice.

11. Signatures

Approved for Citrus Levy Marion Regional Workforce Development Board, Inc.:

Approved for:

By: _____

Name: Thomas E. Skinner, Jr.

Title: Chief Executive Officer

Date: _____

By: _____

Name: _____

Title: _____

Date: _____

By: _____

Name: Carl Zalak, Jr.

Title: Chair, CLMWDC

Date: _____

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by using TTY/TDD equipment via the Florida Relay Service at 711. If you need accommodations, call 1-800-434-5627 ext. 7878 or e-mail accommodations@careersourceclm.com three business days in advance. A proud member of the American Job Center network.

Attachment 5

Proposal Scoring Matrix

One Stop Operator ITN

Scoring Matrix

Reviewer

Respondent

NAME: _____

NAME: _____

Scoring: Read each qualifier below and rate the above respondent's proposal on a scale of 1-10.
A score of 1 is the lowest with 10 being the highest.

- | | | |
|------|--|-------|
| 1.) | Rate how well the respondent's proposal addressed <u>all</u> requested elements contained in the Invitation to Negotiate (ITN). | _____ |
| 2.) | Rate the respondent's overall experience overseeing program delivery in the workforce system based on their proposal | _____ |
| 3.) | Rate the respondent's understanding of the various funding streams offered in the workforce system as well as those through partner agencies | _____ |
| 4.) | Rate the respondent's past quantifiable experience in workforce as it relates to operation of One Stop career centers | _____ |
| 5.) | Rate the respondent's proposed level of collaboration and provision of input by members of CareerSource management and members of the Board of Directors | _____ |
| 6.) | Rate the respondent's organizational and staff qualifications | _____ |
| 7.) | Rate the respondents quantifiable performance history in workforce Development (letters of recommendation will be accepted) | _____ |
| 8.) | Rate how well the proposed scope of work aligns with the requested services in Part III of the ITN (Program Parameters and Description of Services Sought) | _____ |
| 9.) | Rate how well the proposed deliverables will create a comprehensive One Stop 'system'. | _____ |
| 10.) | Rate the respondents demonstrated knowledge of the Workforce Innovation and Opportunity Act (WIOA) | _____ |

| | | |
|---------------|----------------|----------------------|
| Proposed Cost | Proposed Hours | Proposed Hourly Rate |
| | | |

| |
|---------------|
| Overall Score |
| |