



## Consortium

### AGENDA

Thursday, October 5, 2023 – 3:00 p.m.

Zoom Meeting: <https://us02web.zoom.us/j/87160256841>

Phone 1-646-558-8656 Meeting ID: 871 6025 6841

Call to Order		C. Zalak
Roll Call		C. Schnettler
Approval of Minutes, June 21, 2023	Pages 2 - 3	C. Zalak

### **PRESENTATIONS**

Regional Planning – Insytanalytics Regional Presentation Report	Pages 5 - 96	J. Shapiro
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### **ACTION ITEMS**

Regional Planning	Page 97	R. Skinner
2023/2024 Budget	Pages 98 - 99	R. Skinner
Board Appointment	Pages 100 - 101	R. Skinner
ITA Waiver	Page 102	D. French
MOU - WTC	Pages 103 - 112	D. French

### **DISCUSSION ITEMS**

State Update	Pages 113 - 173	R. Skinner
Workforce Issues Important to Our Community		R. Skinner

### **PUBLIC COMMENT**

### **PROJECT UPDATES**

Board Member Agenda – 9/27/2023	Pages 174 - 175
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### **MATTERS FROM THE FLOOR**

### **ADJOURNMENT**

### **OUR VISION STATEMENT**

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



**CAREERSOURCE CITRUS LEVY MARION  
Consortium**

**MINUTES**

DATE: June 21, 2023  
PLACE: College of Central Florida – Enterprise Center  
TIME: 11:00 a.m.

**MEMBERS PRESENT**

Commissioner Finegan  
Commissioner Zalak

**MEMBERS ABSENT**

Commissioner Hodge

**OTHER ATTENDEES**

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

Cira Schnettler, CSCLM

**CALL TO ORDER**

The meeting was called to order by Commissioner Zalak, at 11:08 p.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 April 14, 2023, meeting. Commissioner Finegan seconded the motion. Motion carried.

**PUBLIC COMMENT**

None

**DISCUSSION ITEMS**

**State Update**

Rusty Skinner stated the State is undergoing restructuring. DEO will be called the Department of Commerce. Enterprise Florida is being disbanded and absorbed into the new entity. CareerSource Florida will have a stronger role in policymaking. He also stated that the State is moving ahead with the realignment and creating system improvements by implementing regional planning. We will be drafting a letter of intent to submit to CareerSource Florida with our request to collaborate with three other regions. We are also hiring a consultant to assist with navigating the requirements, planning, and evaluating other potential areas for collaboration.

## **ACTION ITEMS**

### **Board Appointment**

Rusty Skinner reviewed the board vacancies in all three counties and welcomed any recommendations from the Commissioners.

Commissioner Zalak made a motion to approve the appointment of Andrea Juaristic, Kevin Sheilley, Larry White, and Staci Bertrand. Commissioner Finegan seconded the motion. Motion carried.

### **Budget Updates**

Rusty Skinner reviewed the budget explaining that there was an 11% reduction in funding. There was additional discussion on carry forward funds, salary expenses, staff reorganization, and unexpected costs.

Commissioner Zalak made a motion to approve the 2023-2024 preliminary budget. Commissioner Finegan seconded the motion. Motion carried.

### **990**

Commissioner Zalak made a motion to approve the 990. Commissioner Finegan seconded the motion. Motion carried.

### **By-Laws Amendment – Term Limits**

Rusty Skinner explained that the 8-year term limit timeframe was implemented last year, but the By-Laws needed to be updated to reflect the change. Board members could serve for a consecutive eight years then take a break and be re-appointed. There was discussion on the length of time for a break. Commissioner Zalak recommended a two-year break between appointments.

Commissioner Zalak made a motion to approve the revision of term limits into the By-Laws. Commissioner Finegan seconded the motion. Motion carried.

### **One Stop Operator ITN**

Commissioner Zalak made a motion to approve the contract with Southern Indiana Works as the One Stop Operator. Commissioner Finegan seconded the motion. Motion carried.

## **PROJECT UPDATES**

None

## **MATTERS FROM THE FLOOR**

None

## **ADJOURNMENT**

There being no further business, the meeting was adjourned at 11:54 a.m.

## **APPROVED:**

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# Citrus, Levy, Marion Counties

Commuter Pattern and Occupational Overlap



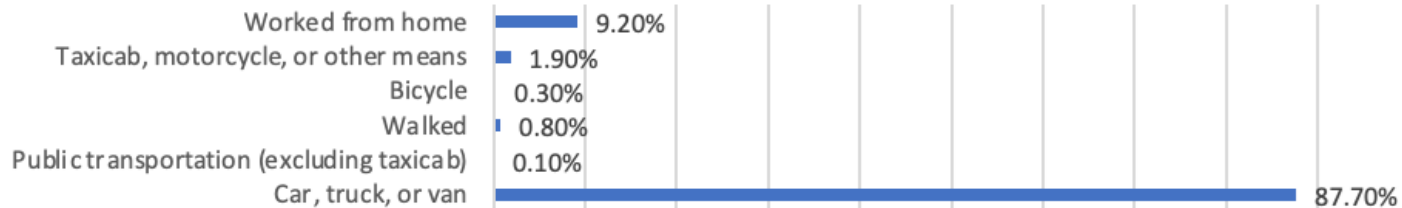
# Commuting Patterns

An analysis of commuting patterns around Citrus, Levy, and Marion counties; how individuals work, where they work, and how they get there.

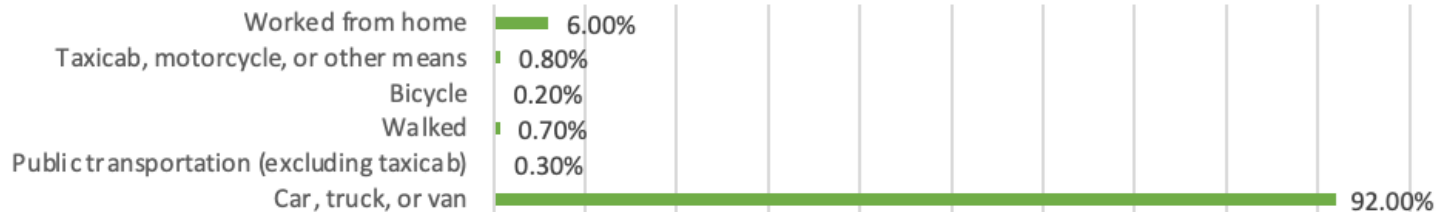
	Citrus County	Levy County	Marion County
Worked in state of residence	98.70%	99.60%	99.10%
Worked in county of residence	75.30%	42.70%	80.50%
Worked outside county of residence	23.40%	56.90%	18.60%

## Mode of Commute

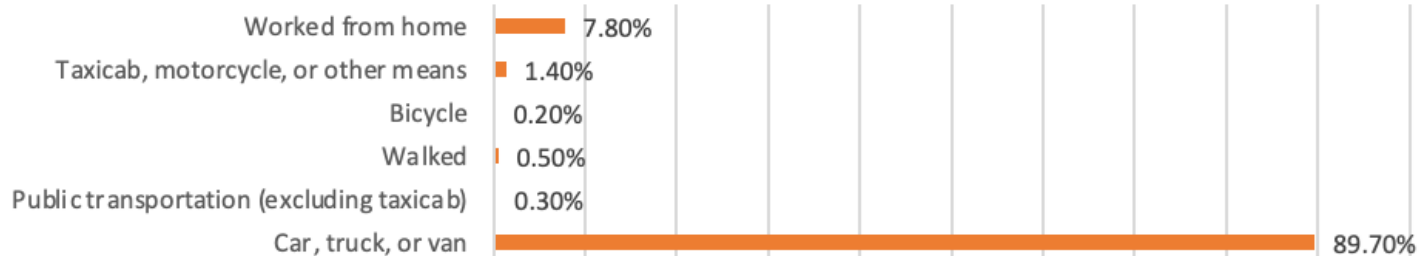
### Citrus County



### Levy County

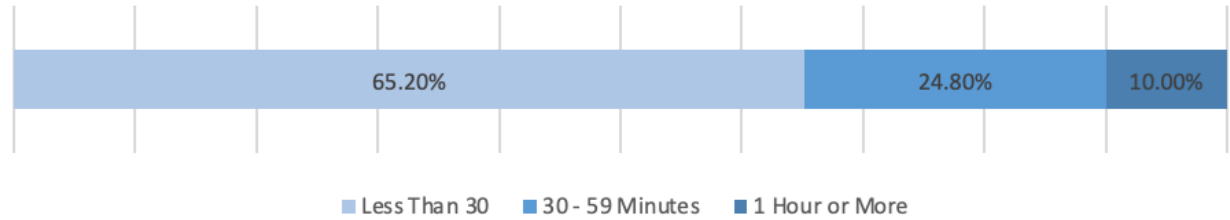


### Marion County

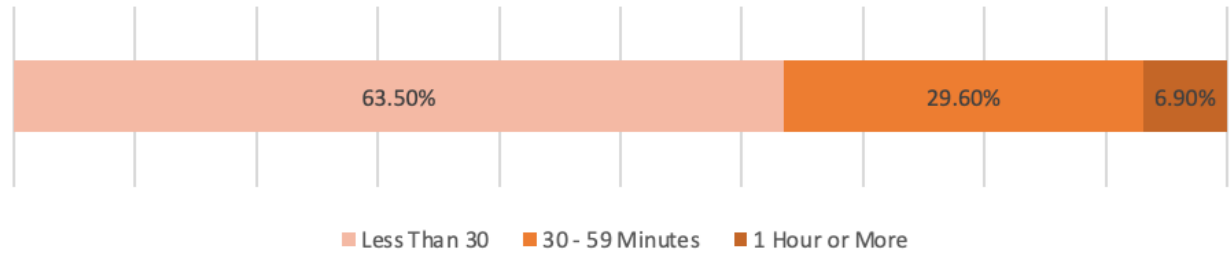


## Length of Commute

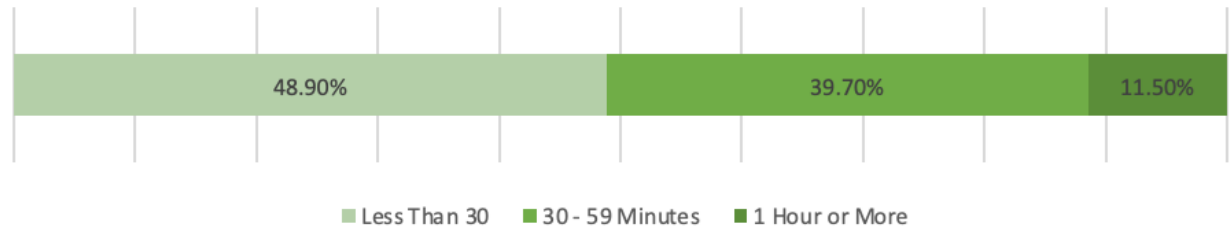
### Citrus County



### Marion County



### Levy County



# Main Takeaways

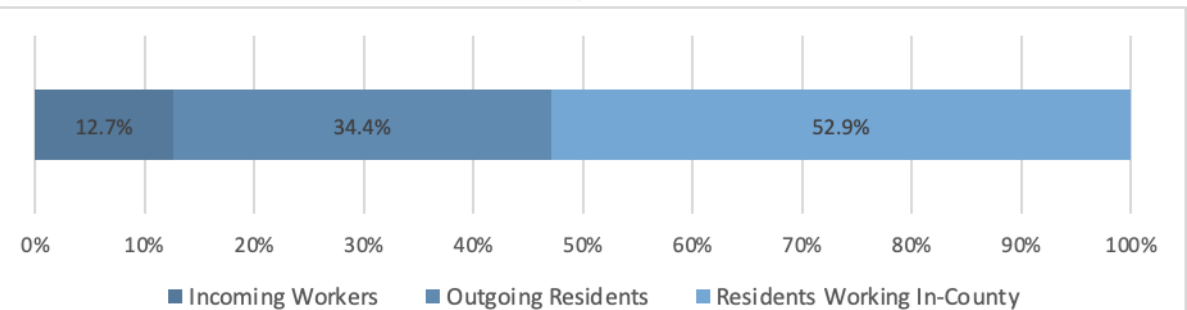
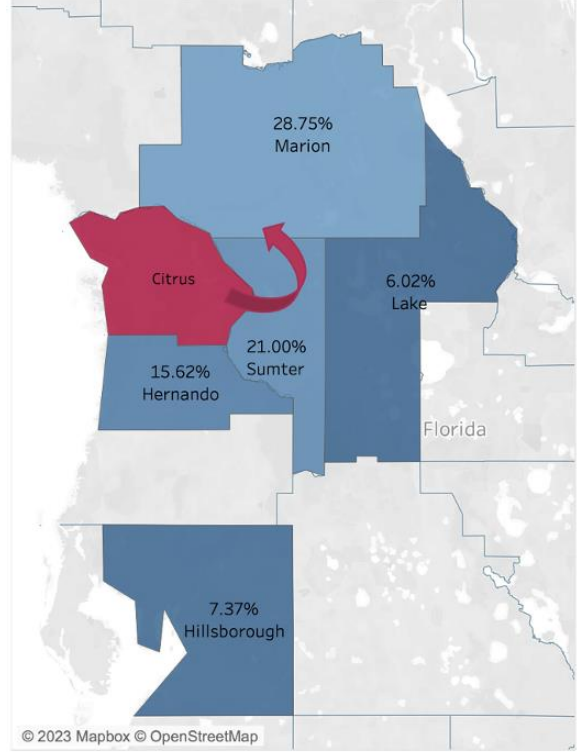
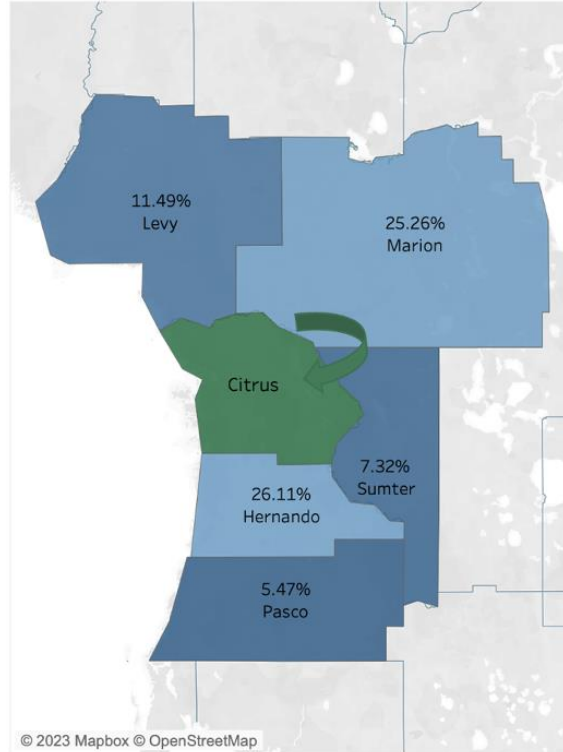
- Most in Citrus, Levy, and Marion commute by car, truck or van
- Between 6 and 9.2 percent work from home
- Average commute time < 30 minutes, but many spend 30-60 minutes, particularly Levy county
- 75.3 percent of Citrus residents don't leave their county for work, 80.5 percent for Marion, and 42.7 percent for Levy

# Inflow and Outflow From Citrus, Levy, and Marion

An analysis of where workers are finding their employment.

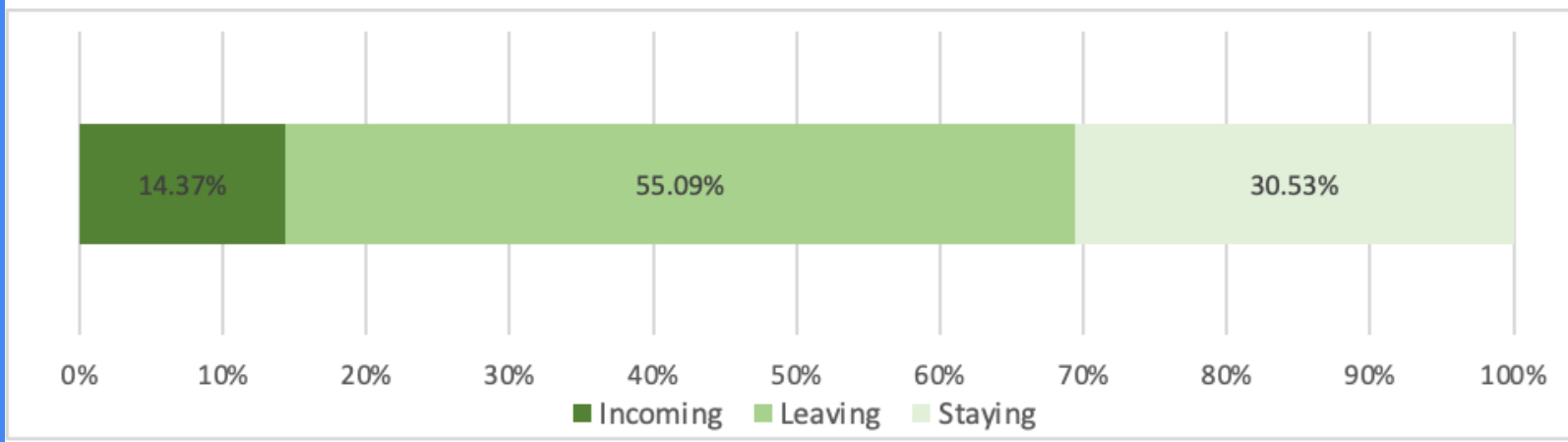
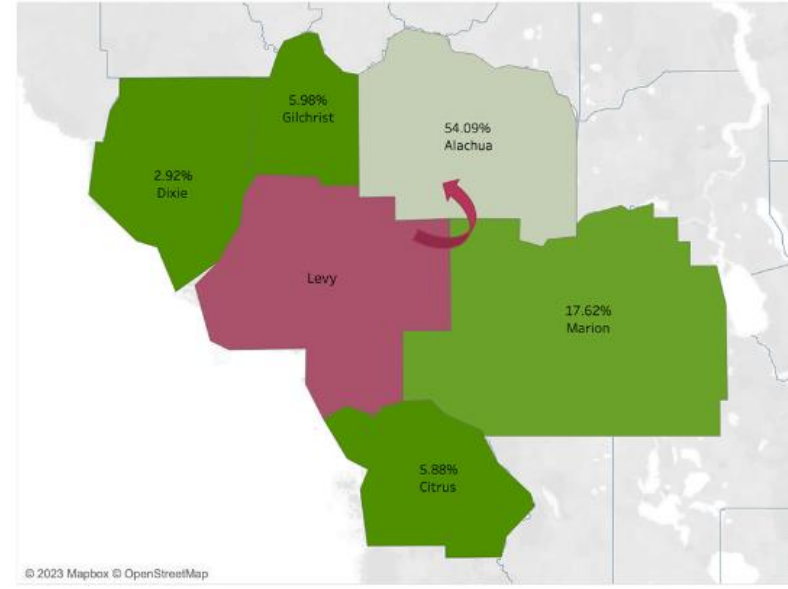
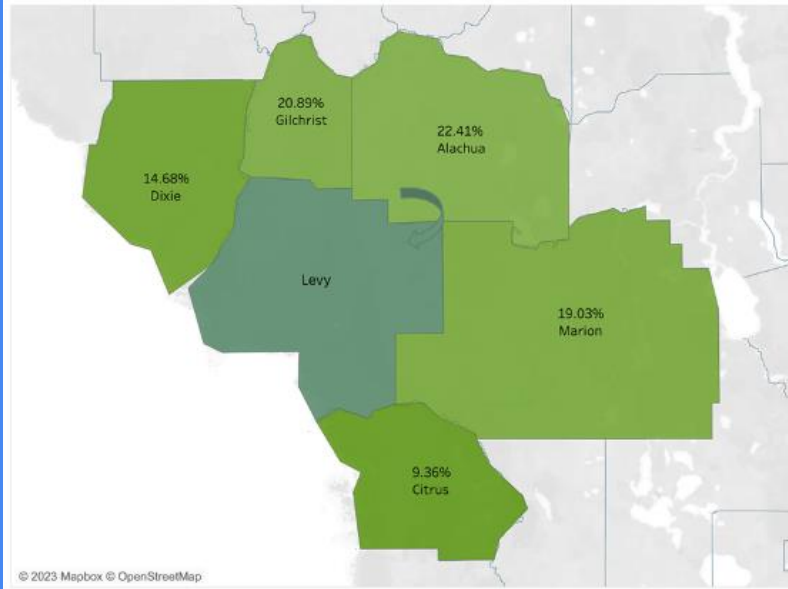
- Citrus and Levy have a large inflow and outflow to/from Marion
- Other important inflow/outflow counties include Hernando, Sumter, Alachua, Gilchrist, and Lake
- The majority work in-county in Marion and Citrus, but not in Levy

## Top Inflow and Outflow Counties for Citrus

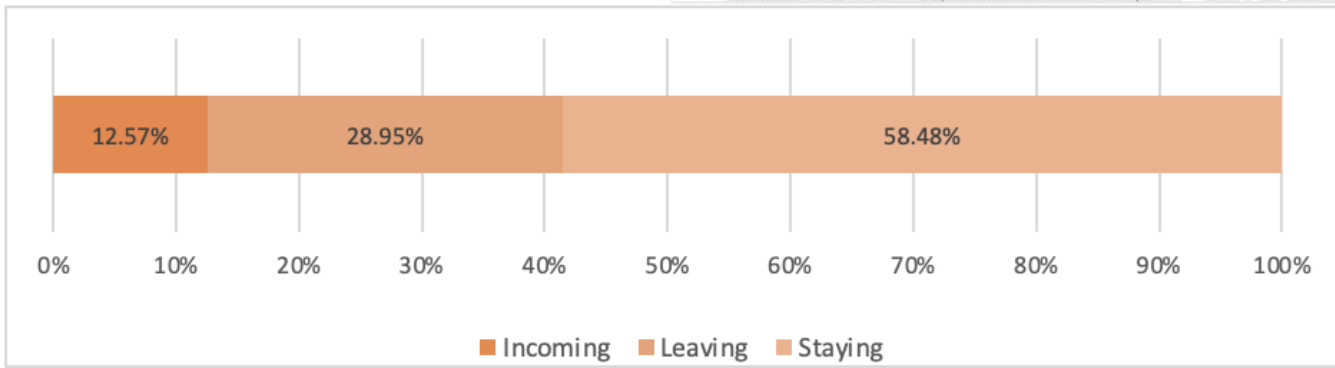
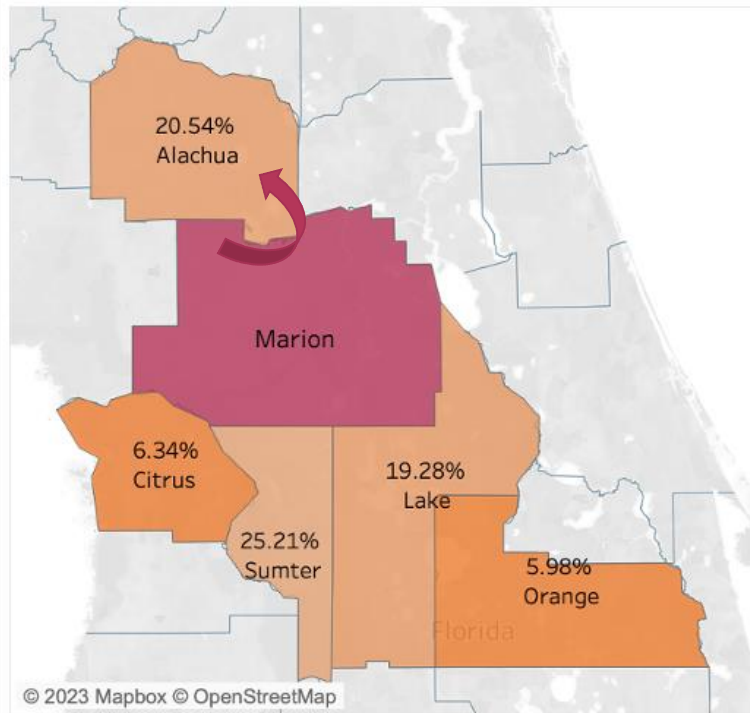
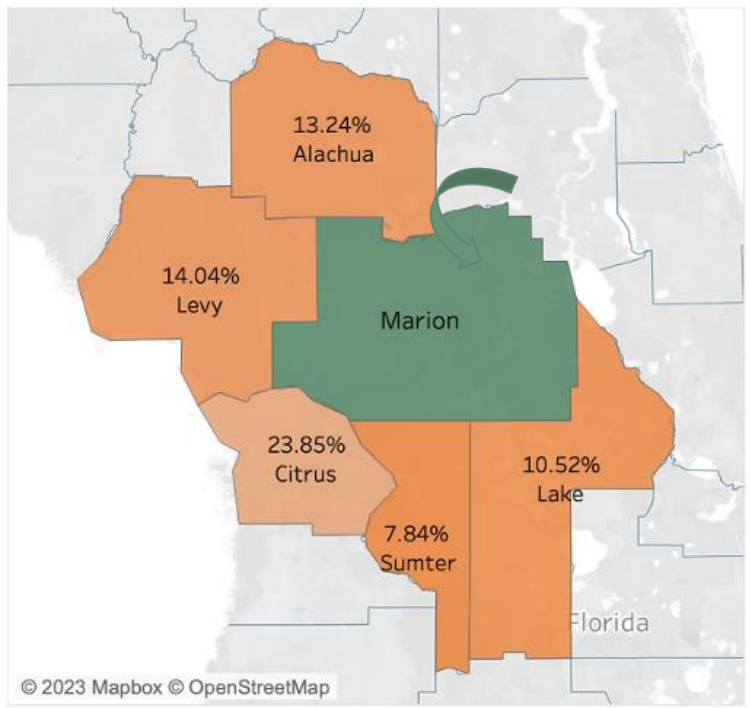




# Top Inflow and Outflow Counties for Levy



# Top Inflow and Outflow Counties for Marion

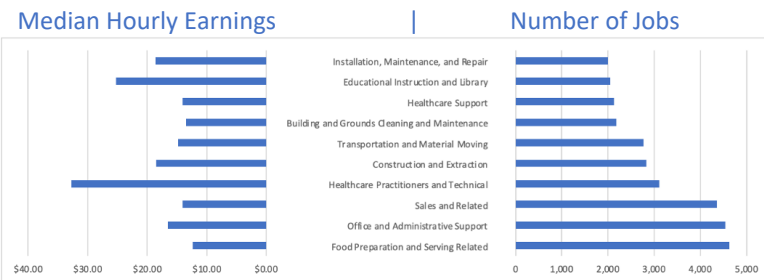


# Main Takeaways

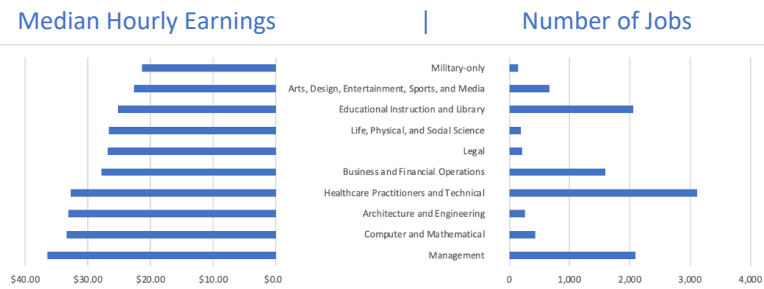
- Citrus and Levy have a large inflow and outflow to/from Marion
- Other important inflow/outflow counties include Hernando, Sumter, Alachua, Gilchrist, and Lake
- The majority work in-county in Marion and Citrus, but not in Levy

# Highest Paying, Growing, and Job Producing Occupations In Marion, Citrus, and Levy

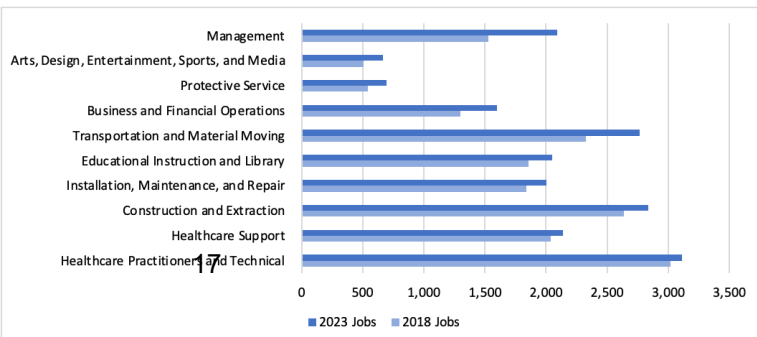
## Largest Occupations (2018-2023)



## Highest Paying Occupations (2018-2023)

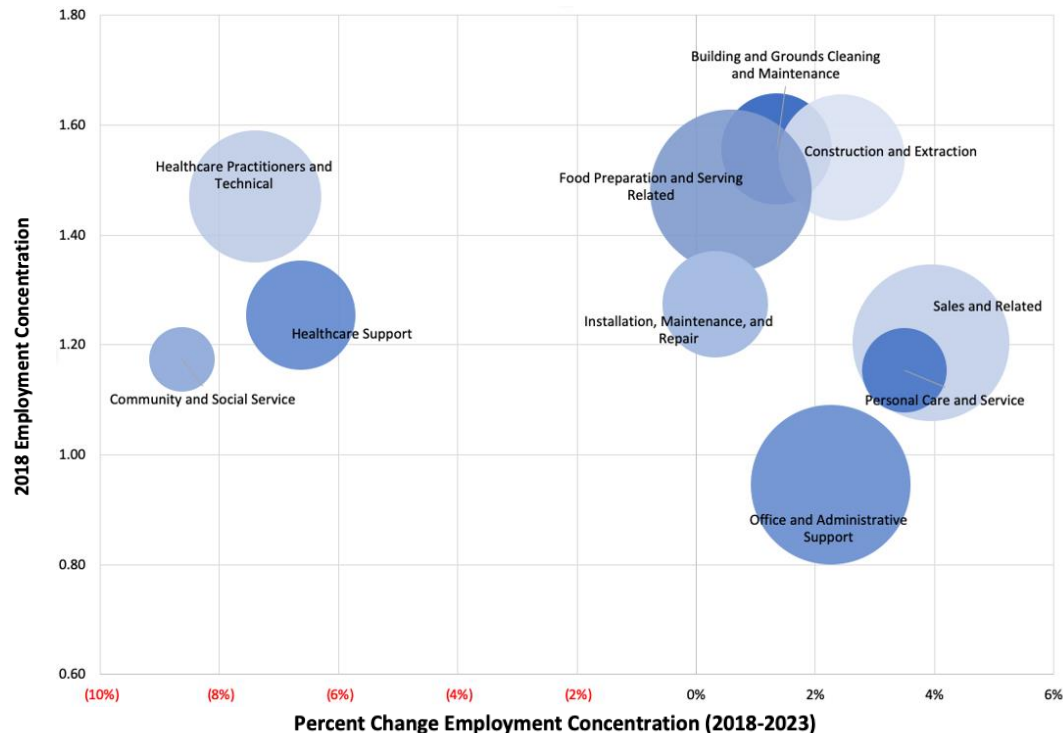


## Fastest Growing Occupations (2018-2023)



# Citrus County

## Highest Occupation Employment Concentration



## Largest Occupations (2018-2023)

Median Hourly Earnings

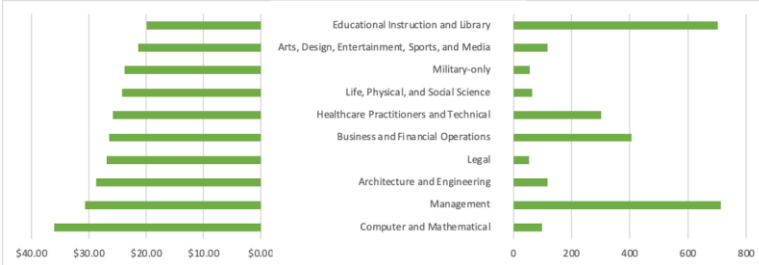
Number of Jobs



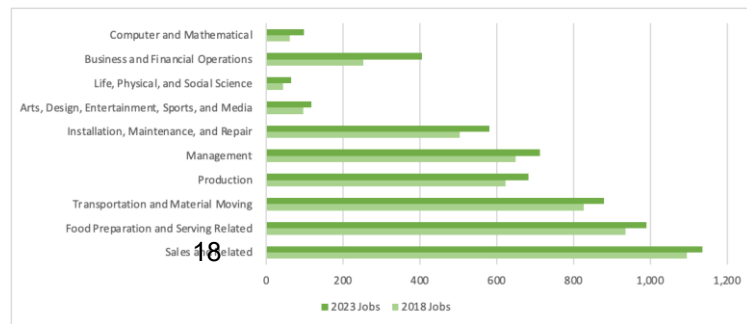
## Highest Paying Occupations (2018-2023)

Median Hourly Earnings

Number of Jobs

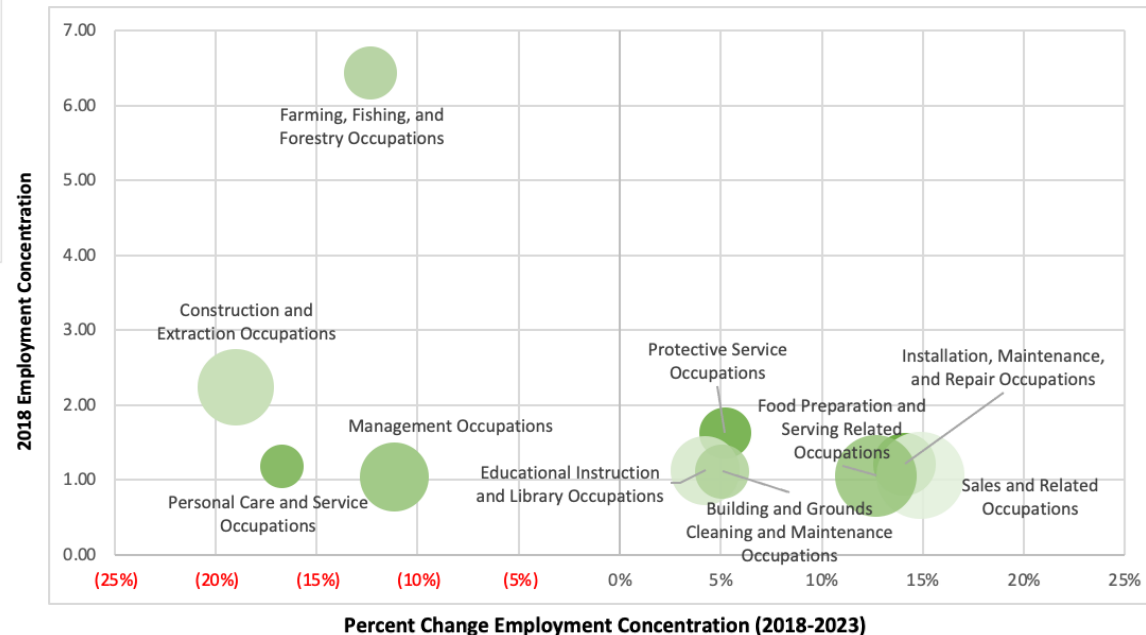


## Fastest Growing Occupations (2018-2023)

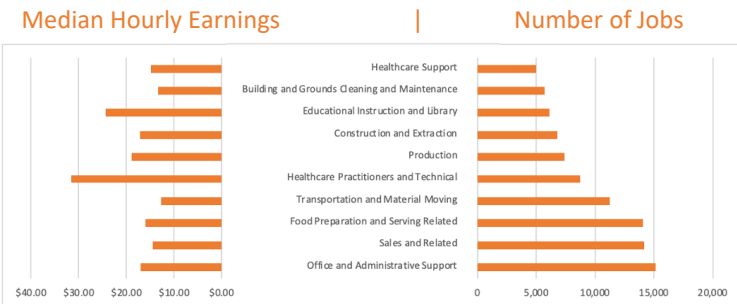


# Levy County

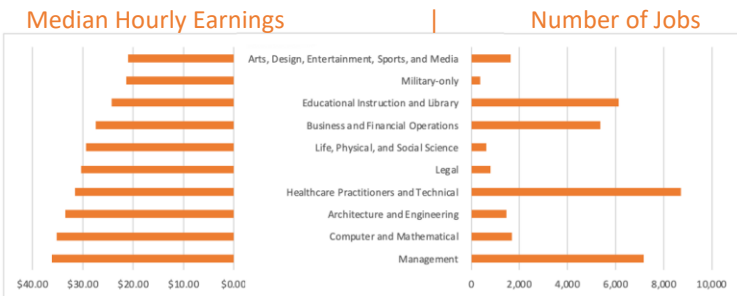
## Highest Occupation Employment Concentration



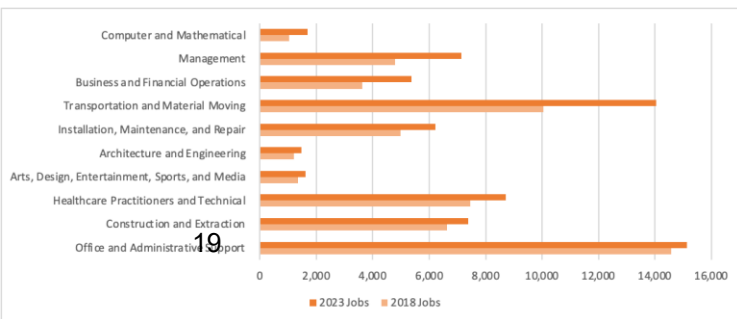
## Largest Occupations (2018-2023)



## Highest Paying Occupations (2018-2023)

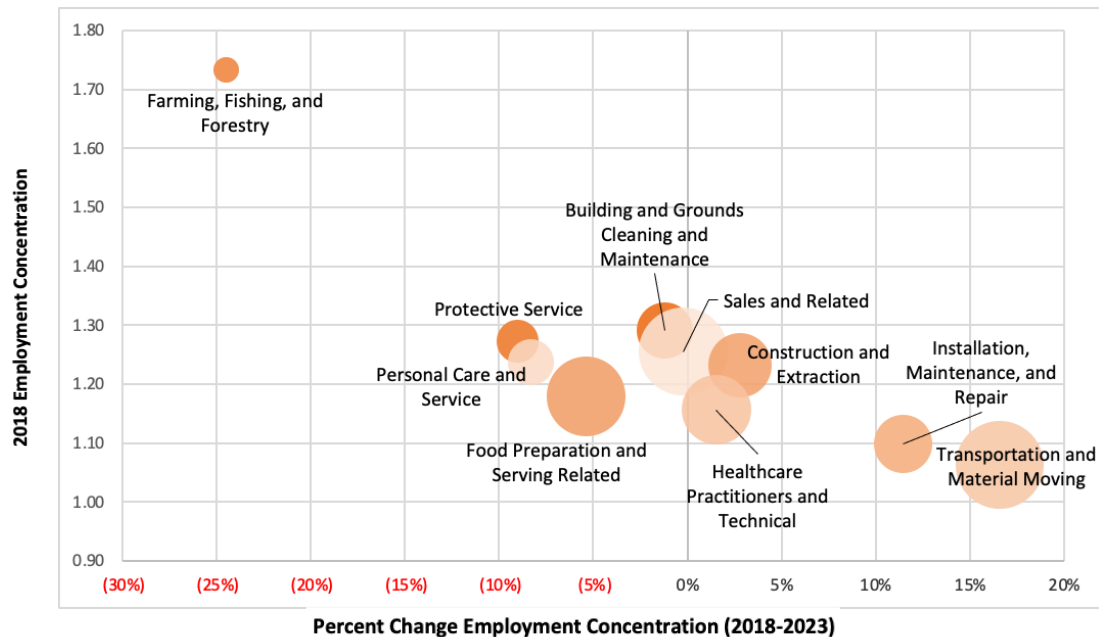


## Fastest Growing Occupations (2018-2023)



# Marion County

## Highest Occupation Employment Concentration

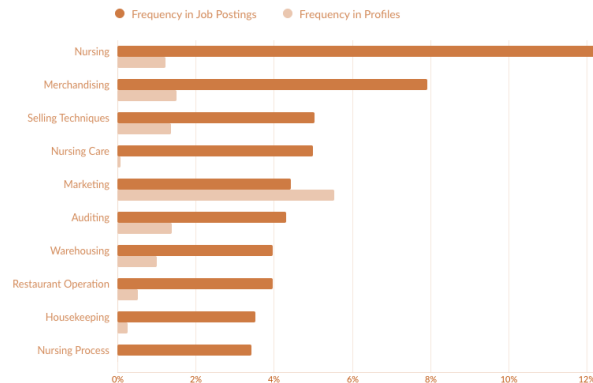


# Specialized Skills In Job Postings

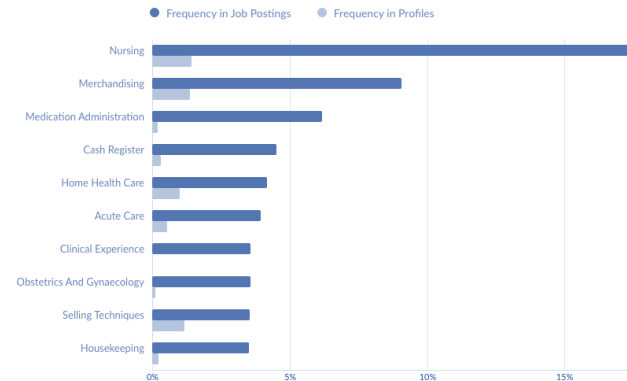
Levy



Marion



Citrus



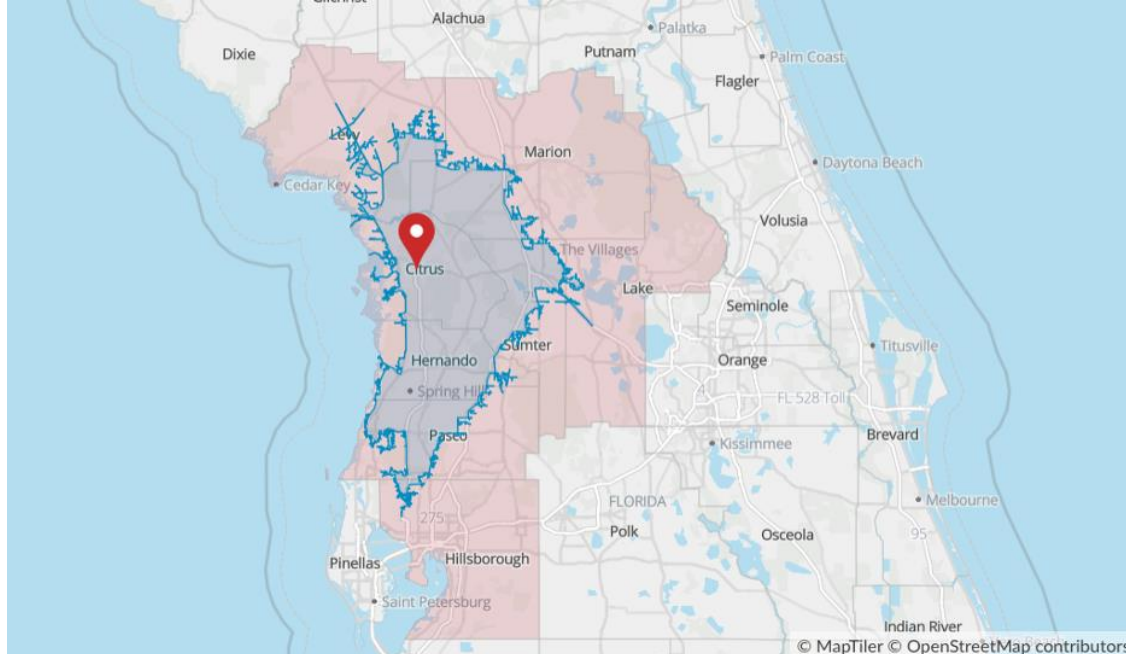


# Top Occupations Within a 60 Minute Drive Time

Top ten industries at the 5 digit SOC level for regions around Marion, Citrus, and Levy were highly similar, all three regions listing:

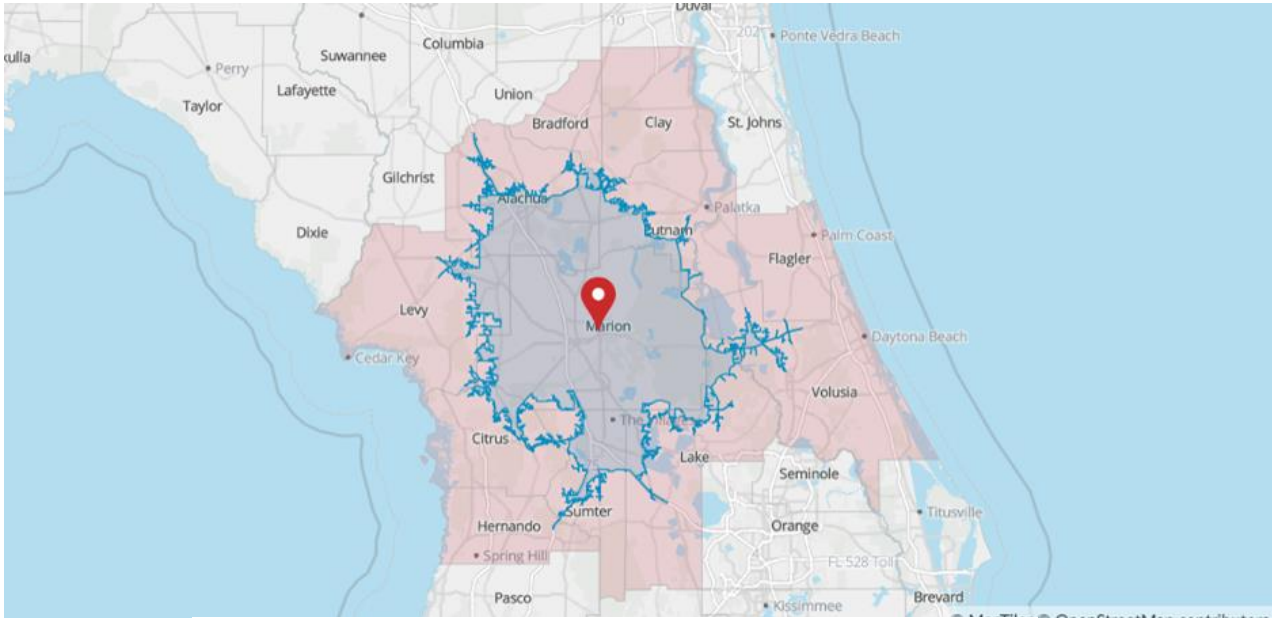
- Retail Salespersons
- Customer Service Representatives
- Stockers and Order Fillers
- Registered Nurses
- Cashiers, Office Clerks, General
- General and Operations Managers
- Fast Food and Counter Workers
- Waiters and Waitresses

# Citrus: Top Occupations Within 60 Minute Commute



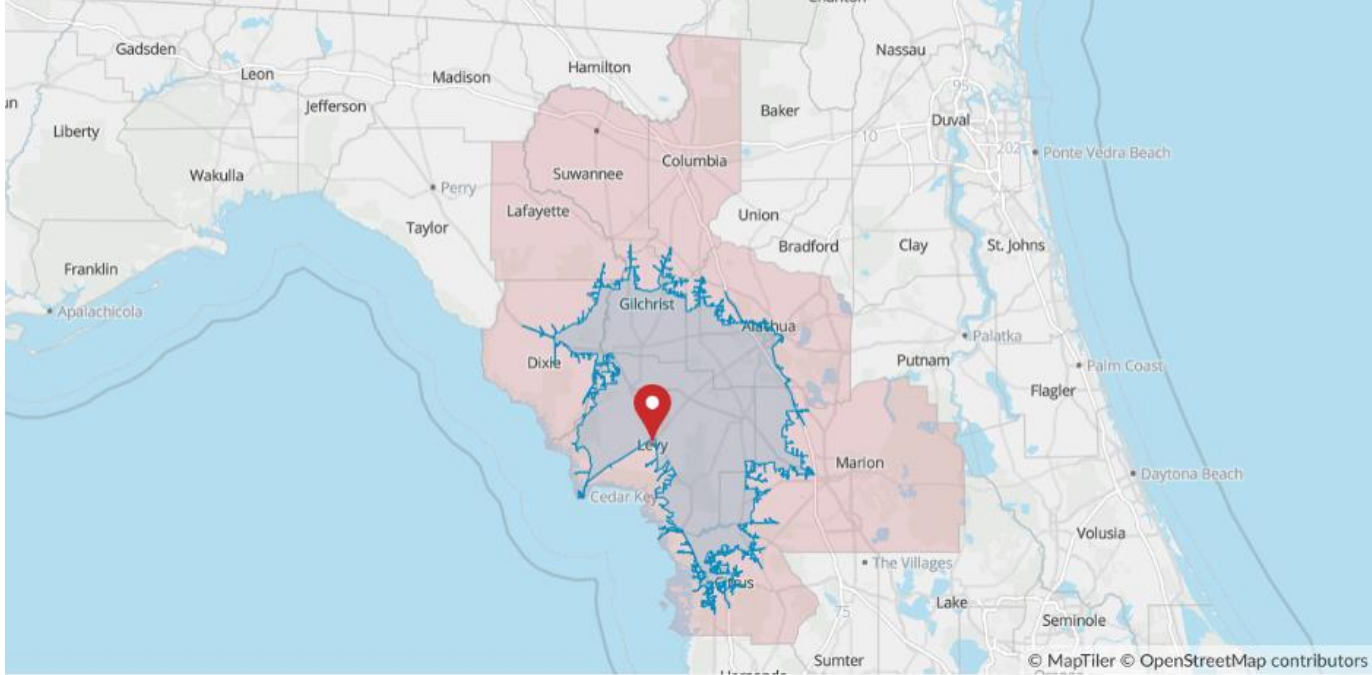
Description	2023 Jobs	COL Adjusted Median Annual Earnings
Retail Salespersons	40,303	\$28,705
Customer Service Representatives	36,882	\$37,554
Stockers and Order Fillers	34,528	\$31,912
Registered Nurses	30,372	\$75,781
Cashiers	29,942	\$25,775
Office Clerks, General	27,436	\$37,866
General and Operations Managers	25,920	\$90,155
Fast Food and Counter Workers	25,218	\$24,506
Waiters and Waitresses	23,930	\$27,573
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	19,502	\$27,897

# Marion: Top Occupations Within 60 Minute Commute



Description	2023 Jobs	COL Adjusted Median Annual Earnings
Retail Salespersons	28,921	\$27,767
Stockers and Order Fillers	23,601	\$31,915
Cashiers	22,791	\$25,331
Registered Nurses	22,790	\$71,579
Fast Food and Counter Workers	20,521	\$23,241
Waiters and Waitresses	19,090	\$26,877
Office Clerks, General	18,792	\$35,442
Customer Service Representatives	15,052	\$34,122
General and Operations Managers	14,124	\$81,095
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	13,316	\$27,548

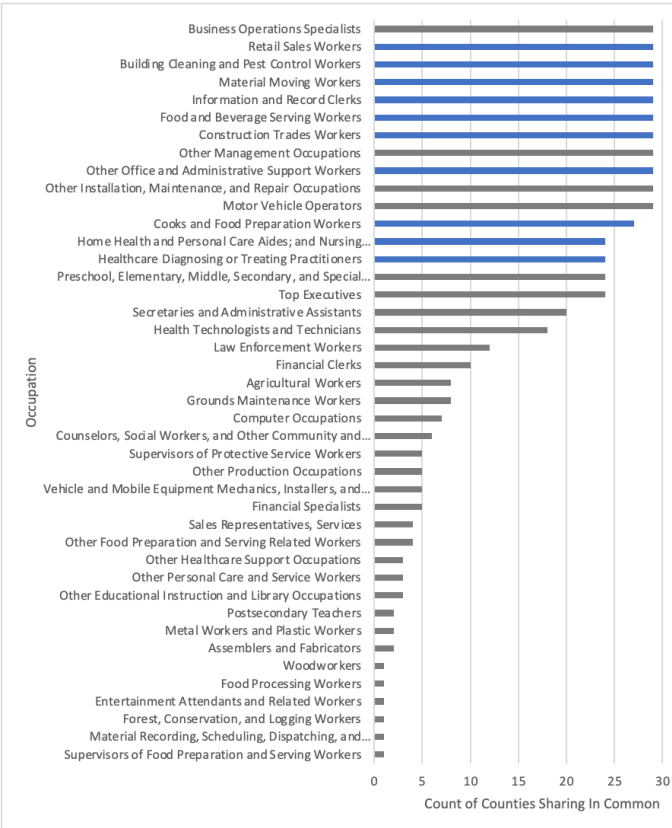
# Levy: Top Occupations Within 60 Minute Commute



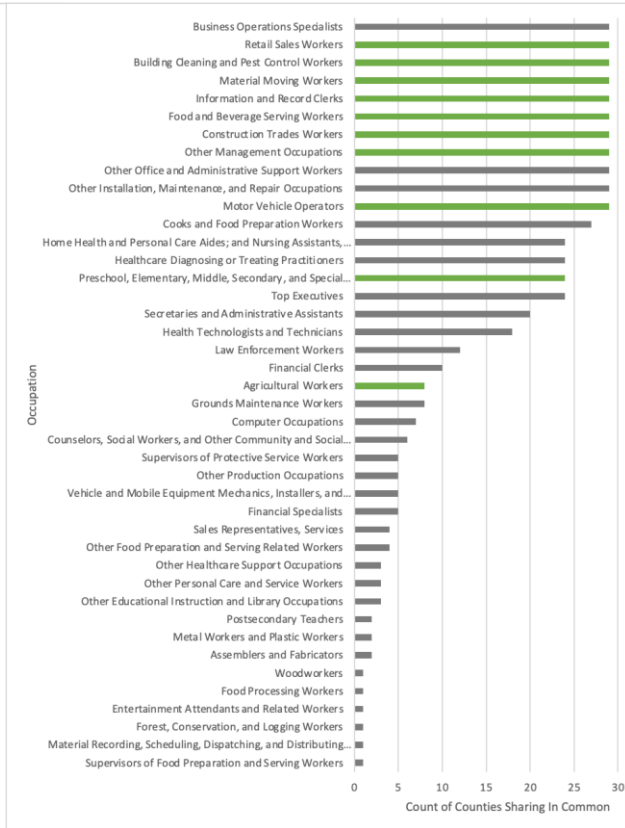
Description	2023 Jobs	COL Adjusted Median Annual Earnings
Retail Salespersons	11,084	\$28,782
Registered Nurses	10,670	\$74,499
Stockers and Order Fillers	9,065	\$32,168
Cashiers	8,980	\$25,840
Fast Food and Counter Workers	8,671	\$24,502
Office Clerks, General	8,079	\$36,421
Postsecondary Teachers	7,314	\$73,393
Waiters and Waitresses	6,817	\$26,848
General and Operations Managers	5,993	\$84,148
Customer Service Representatives	5,903	\$35,170

# Cross Comparison Of Top Listed Occupations and Industries

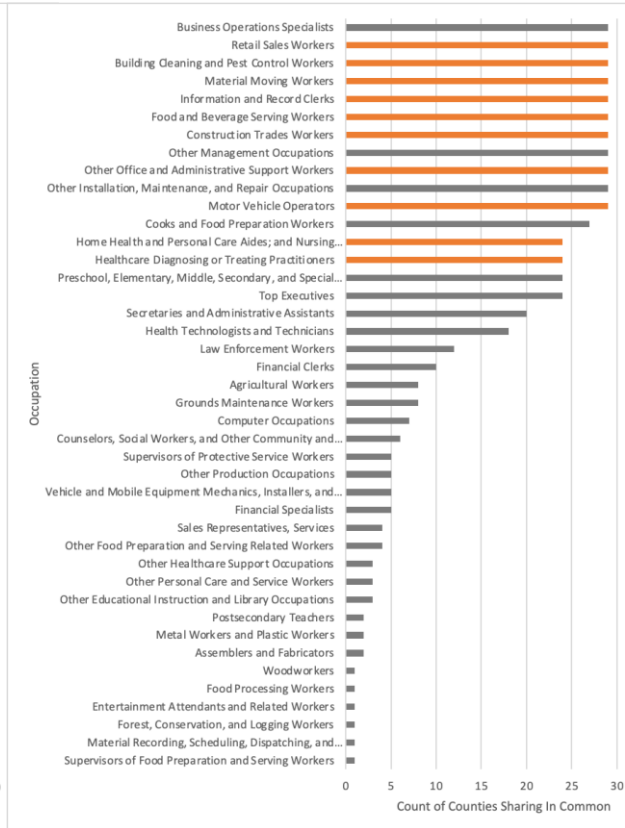
# Citrus



# Levy



# Marion



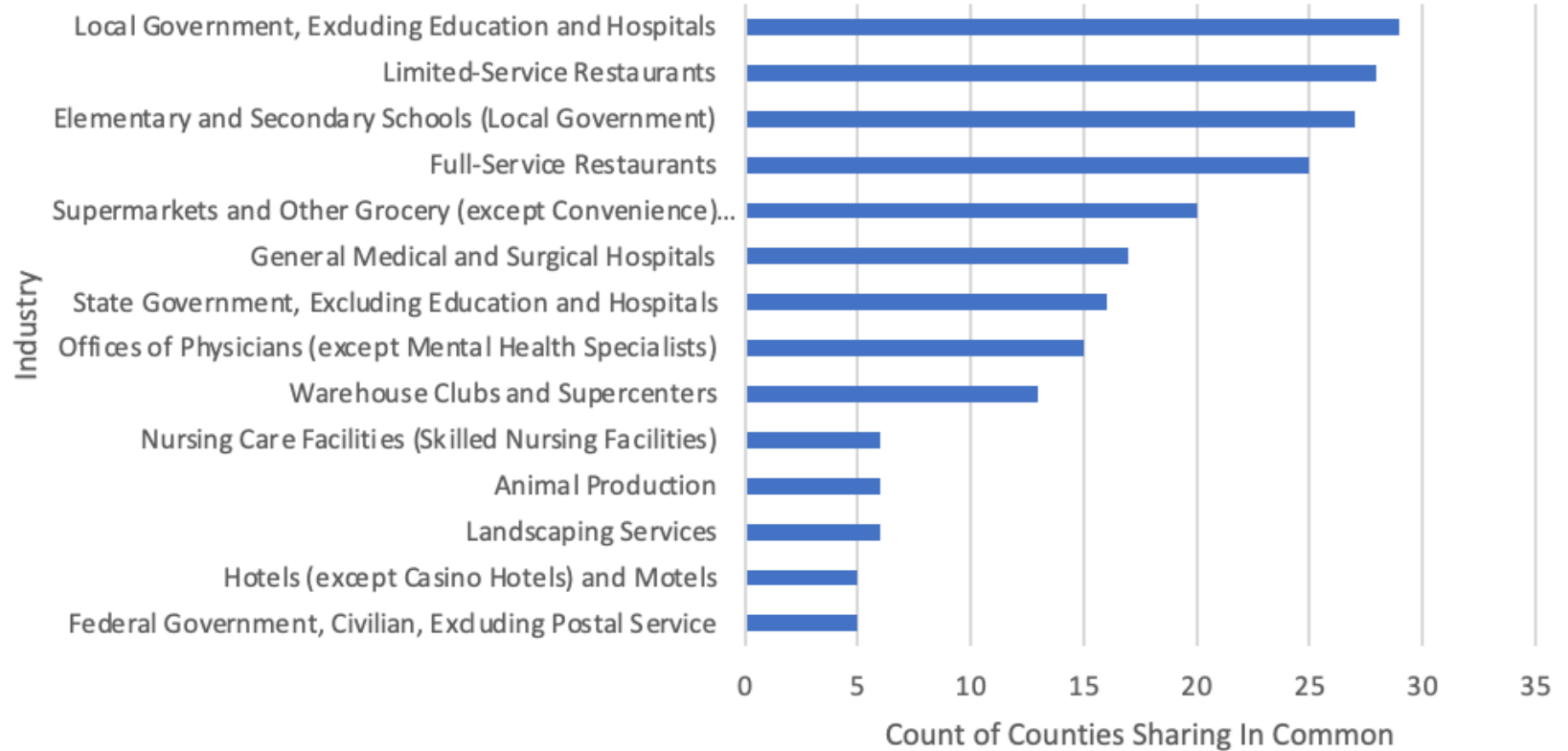
# Cross Comparison of Top Occupations By County

	Orange	Jefferson	Madison	Taylor	Hamilton	Union	Duval	Nassua	Baker	St. Johns	Suwannee	Lafayette	Dixie	Gilchrist	Columbia	Bradford	Alachua	Putnam	Clay	Levy	Hernando	Marion	Hillsborough	Pasco	Lake	Sumter	Citrus	Flagler	Volusia	
Orange		16	14	14	13	14	19	15	15	17	13	13	13	14	16	13	16	16	17	13	17	16	19	17	16	16	15	16	16	
Jefferson	16		15	15	16	15	16	17	15	17	15	14	15	17	16	14	15	16	16	14	16	16	16	16	18	17	16	17	16	
Madison	14	15		17	16	15	14	15	16	15	17	17	15	17	17	15	17	17	16	15	16	16	14	16	17	16	16	16	16	
Taylor	14	15	17		16	16	15	16	15	16	17	16	16	17	18	17	15	18	16	17	16	16	15	16	16	16	15	17	17	
Hamilton	13	16	16	16		15	13	15	13	14	17	15	17	17	15	16	13	15	14	16	14	14	13	14	16	15	14	15	14	
Union	14	15	15	16	15		14	16	17	16	16	17	16	17	17	17	16	16	16	14	16	16	14	16	16	16	16	15	16	16
Duval	19	16	14	15	13	14		15	15	17	13	14	13	14	17	14	16	17	17	14	17	16	20	17	16	16	15	17	17	
Nassua	15	17	15	16	15	16	15		16	18	15	14	16	16	17	15	16	17	17	14	17	17	15	17	18	17	18	18	18	
Baker	15	15	16	15	13	17	15	16		16	15	16	14	16	17	15	18	17	17	13	17	17	15	17	17	16	17	17	17	
St. Johns	17	17	15	16	14	16	17	18	16		15	14	15	16	17	15	17	17	17	14	18	17	17	18	17	16	17	17	18	
Suwannee	13	15	17	17	17	16	13	15	15	15		15	16	18	16	17	15	16	15	16	15	15	13	15	16	15	14	15	15	
Lafayette	13	14	17	16	15	17	14	14	16	14	15		15	16	17	16	15	16	15	15	15	15	14	15	16	15	15	16	16	
Dixie	13	15	15	16	17	16	13	16	14	15	16	15		16	16	17	14	15	15	15	15	15	13	15	16	16	15	16	15	
Gilchrist	14	17	17	17	17	17	14	16	16	16	18	16	16		17	17	16	16	16	16	16	16	14	16	17	16	15	16	16	
Columbia	16	16	17	18	15	17	17	17	17	17	16	17	16	17		17	17	19	18	16	18	18	17	18	18	18	17	19	19	
Bradford	13	14	15	17	16	17	14	15	15	15	17	16	17	17	17		15	16	16	17	15	16	14	15	15	15	15	16	16	
Alachua	16	15	17	15	13	16	16	16	18	17	15	15	14	16	17	15		17	17	13	18	17	16	18	17	16	17	17	17	
Putnam	16	16	17	18	15	16	17	17	17	17	16	16	15	16	19	16	17		18	15	18	18	17	18	18	17	17	19	19	
Clay	17	16	16	16	14	16	17	17	17	17	15	15	15	16	18	16	17	18		15	18	19	17	18	18	17	18	18	18	
Levy	13	14	15	17	16	14	14	14	13	14	16	15	15	16	16	17	13	15	15		14	16	14	14	15	14	14	15	15	
Hernando	17	16	16	16	14	16	17	17	17	18	15	15	15	16	18	15	18	18	18	14		18	17	20	18	18	17	18	18	
Marion	16	16	16	16	14	16	16	17	17	17	15	15	15	16	18	16	17	18	19	16	18		16	18	18	17	18	18	18	
Hillsborough	19	16	14	15	13	14	20	15	15	17	13	14	13	14	17	14	16	17	17	14	17	16		17	16	16	15	17	17	
Pasco	17	16	16	16	14	16	17	17	17	18	15	15	15	16	18	15	18	18	18	14	20	18	17		18	18	17	18	18	
Lake	16	18	17	16	16	16	16	18	17	17	16	16	16	17	18	15	17	18	18	15	18	18	16	18		18	18	19	18	
Sumter	16	17	16	16	15	16	16	17	16	16	15	15	16	16	18	15	16	17	17	14	18	17	16	18	18		17	18	17	
Citrus	15	16	16	15	14	15	15	18	17	17	14	15	15	15	17	15	17	17	18	14	17	18	15	17	18	17		18	18	
Flagler	16	17	16	17	15	16	17	18	17	17	15	16	16	16	19	16	17	19	18	15	18	18	17	18	19	18	18		19	
Volusia	16	16	16	17	14	16	17	18	17	18	15	16	15	16	19	16	17	19	18	15	18	18	17	18	18	17	18	19		

# Cross Comparison of Top Industry By County

	Citrus	Levy	Marion	Orange	Jefferson	Madison	Taylor	Hamilton	Union	Duval	Nassau	Baker	St. Johns	Suwannee	Lafayette	Dixie	Gilchrist	Columbia	Bradford	Alachua	Putnam	Clay	Hernando	Hillsborough	Pasco	Lake	Sumter	Flagler	Volusia
Citrus		7	10	6	5	5	5	4	6	5	6	7	6	6	4	6	5	7	7	7	7	8	8	7	8	8	7	7	8
Levy	7		7	4	6	5	5	4	5	3	5	6	5	7	5	6	6	5	7	5	6	6	6	5	6	6	6	6	6
Marion	10	7		6	5	5	5	4	6	5	6	7	6	6	4	6	5	7	7	7	7	8	8	7	8	8	7	7	8
Orange	6	4	6		3	5	4	4	4	6	6	5	6	4	2	4	4	6	4	6	5	6	6	7	6	6	5	6	6
Jefferson	5	6	5	3		5	4	4	5	3	4	4	5	6	6	6	8	4	5	4	5	4	4	4	4	4	4	4	4
Madison	5	5	5	5	5		4	4	5	4	4	5	3	5	5	5	6	5	4	4	5	4	4	5	4	4	3	4	4
Taylor	5	5	5	4	4	4		5	4	3	4	5	4	6	3	6	5	5	5	4	5	4	4	4	4	4	4	4	4
Hamilton	4	4	4	4	4	4	5		4	2	4	4	4	5	3	4	4	4	4	3	4	3	3	3	3	3	3	4	3
Union	6	5	6	4	5	5	4	4		3	5	5	5	5	4	5	5	5	5	5	4	5	5	5	6	6	4	5	5
Duval	5	3	5	6	3	4	3	2	3		4	5	4	3	2	3	3	6	3	7	4	5	6	8	5	5	5	4	5
Nassau	6	5	6	6	4	4	4	4	5	4		5	7	5	4	5	4	5	6	6	4	7	6	6	6	7	5	9	7
Baker	7	6	7	5	4	5	5	4	5	5	5		4	5	3	5	5	6	6	6	6	6	7	5	6	6	5	6	6
St. Johns	6	5	6	6	5	3	4	4	5	4	7	4		5	3	5	5	5	5	6	5	7	6	6	6	7	6	7	8
Suwannee	6	7	6	4	6	5	6	5	5	3	5	5	5		5	6	6	5	6	5	5	5	5	5	5	5	5	5	5
Lafayette	4	5	4	2	6	5	3	3	4	2	4	3	3	5		5	6	3	6	3	4	3	3	4	3	3	3	4	3
Dixie	6	6	6	4	6	5	6	4	5	3	5	5	5	6	5		6	5	6	5	6	5	5	5	5	5	5	5	5
Gilchrist	5	6	5	4	8	6	5	4	5	3	4	5	5	6	6	6		5	5	4	6	4	4	4	4	4	4	4	4
Columbia	7	5	7	6	4	5	5	4	5	6	5	6	5	5	3	5	5		5	7	6	6	6	7	6	6	6	5	6
Bradford	7	7	7	4	5	4	5	4	5	3	6	6	5	6	6	6	5	5		5	6	6	6	5	7	6	6	7	6
Alachua	7	5	7	6	4	4	4	3	5	7	6	6	6	5	3	5	4	7	5		6	7	8	8	7	7	7	6	7
Putnam	7	6	7	5	5	5	5	4	4	4	4	6	5	5	4	6	6	6	6	6		6	6	5	6	6	6	5	6
Clay	8	6	8	6	4	4	4	3	5	5	7	6	7	5	3	5	4	6	6	7	6		8	7	8	9	7	8	9
Hernando	8	6	8	6	4	4	4	3	5	6	6	7	6	5	3	5	4	6	6	8	6	8		7	8	8	7	7	8
Hillsborough	7	5	7	7	4	5	4	3	5	8	6	5	6	5	4	5	4	7	5	8	5	7	7		7	7	7	6	7
Pasco	8	6	8	6	4	4	4	3	6	5	6	6	6	5	3	5	4	6	7	7	6	8	8	7		9	7	7	8
Lake	8	6	8	6	4	4	4	3	6	5	7	6	7	5	3	5	4	6	6	7	6	9	8	7	9		7	8	9
Sumter	7	6	7	5	4	3	4	3	4	5	5	5	6	5	3	5	4	6	6	7	6	7	7	7	7		6	7	
Flagler	7	6	7	6	4	4	4	4	5	4	9	6	7	5	4	5	4	5	7	6	5	8	7	6	7	8	6		8
Volusia	8	6	8	6	4	4	4	3	5	5	7	6	8	5	3	5	4	6	6	7	6	9	8	7	8	9	7	8	



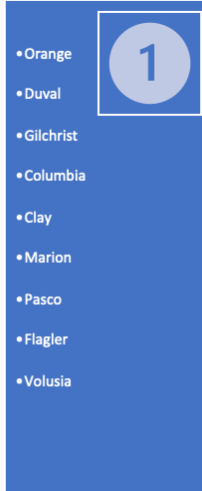


# Kmodes Clustering

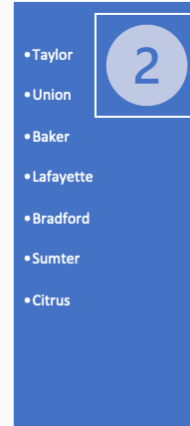
# Kmode Clustering Results

- Similar to Kmeans clustering
- Unsupervised learning algorithm that identifies the most frequent values within each cluster
- Examines the ranked occupations for all counties of interest based on similarity of ranking, not overlap
- These counties may not share the most occupations in common, but the occupations they do share are of similar importance.
- There are social, historical, and economic factors with enormous impact on how regions relate to one another that are missing from this calculation - should be used for possible insight, not explicit truth

Cluster 1



Cluster 2



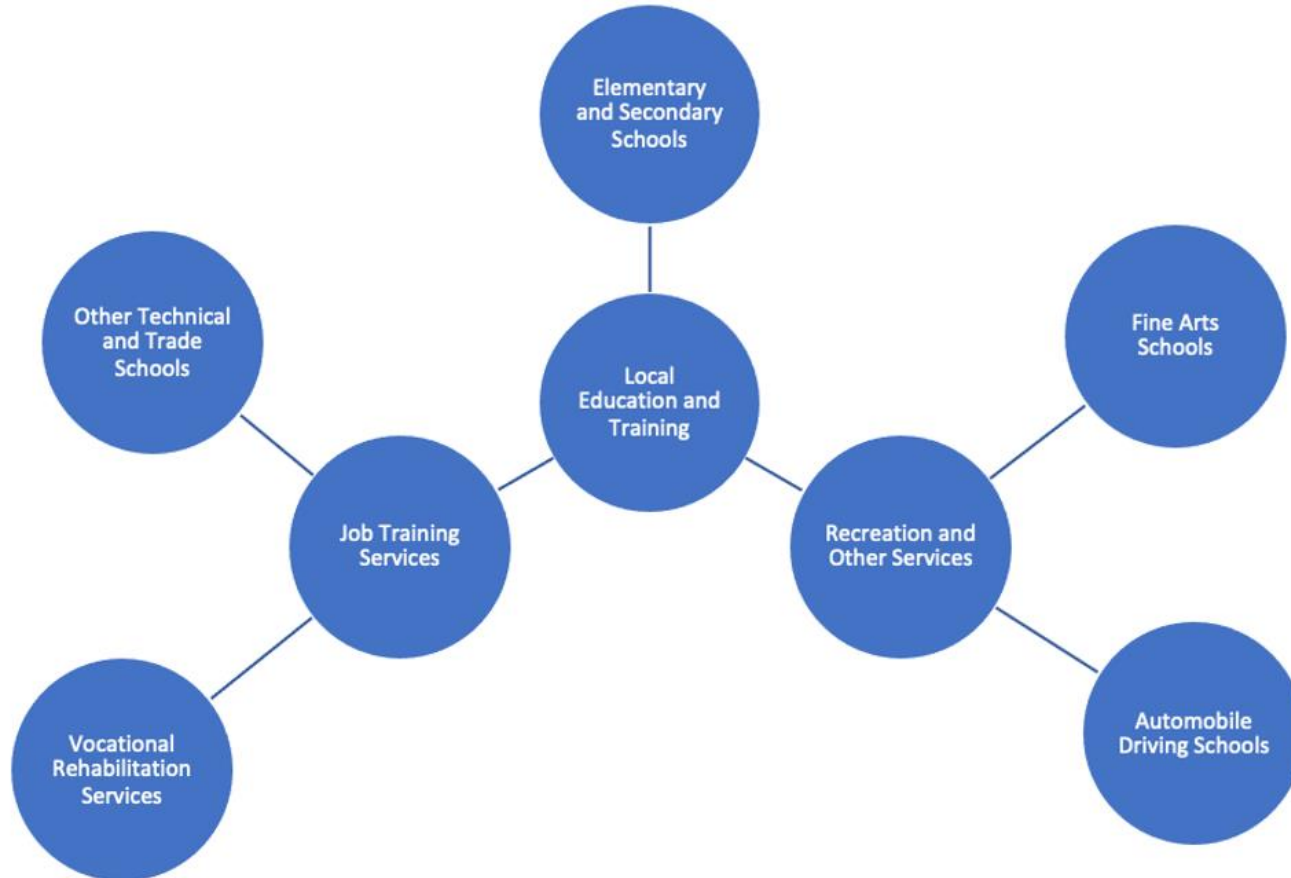
Cluster 3



# Industry Clusters and Subclusters

Related Industry Webs

## Elementary and Secondary Schools



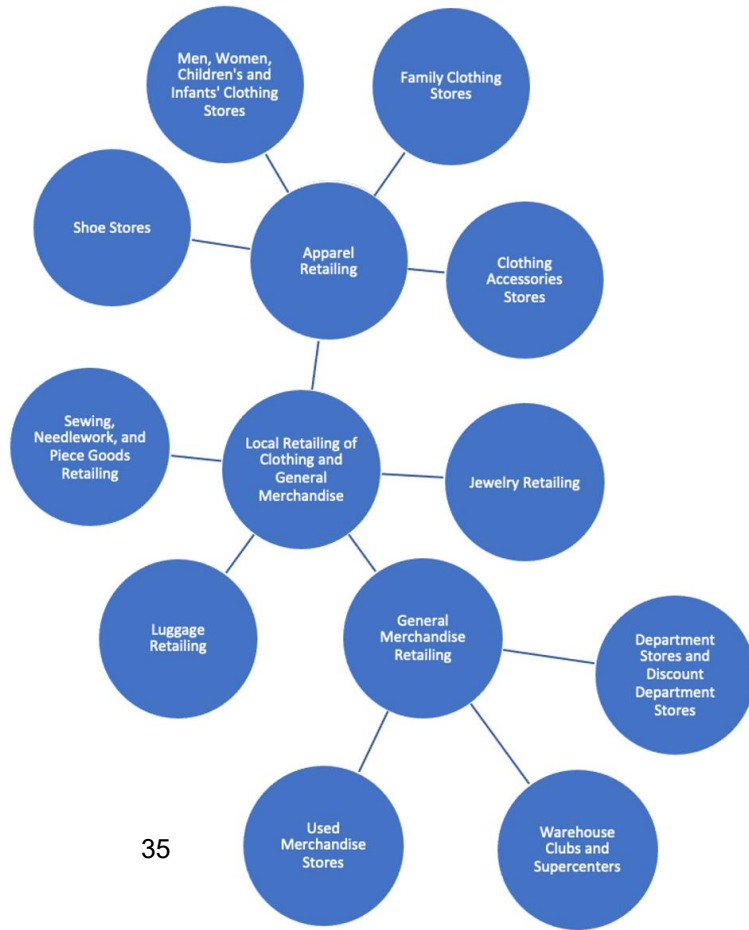
## Full-Service Restaurants and Limited-Service Restaurants



## Supermarkets and Other Grocery (except Convenience) Stores



## Warehouse Clubs and Supercenters

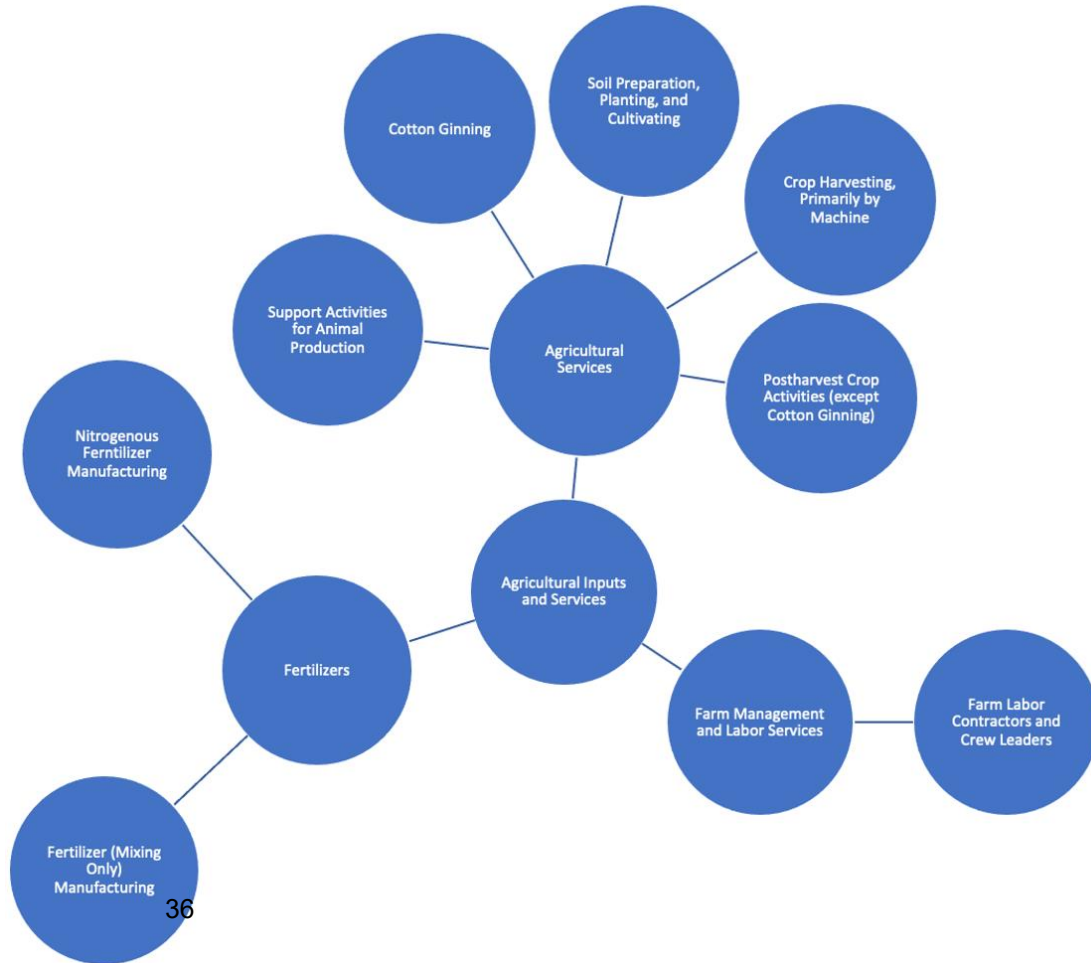


35

## Nursing Care Facilities, General Medical and Surgical Hospitals, and Offices of Physicians (except Mental Health Specialists)



# Support Activities for Animal Production

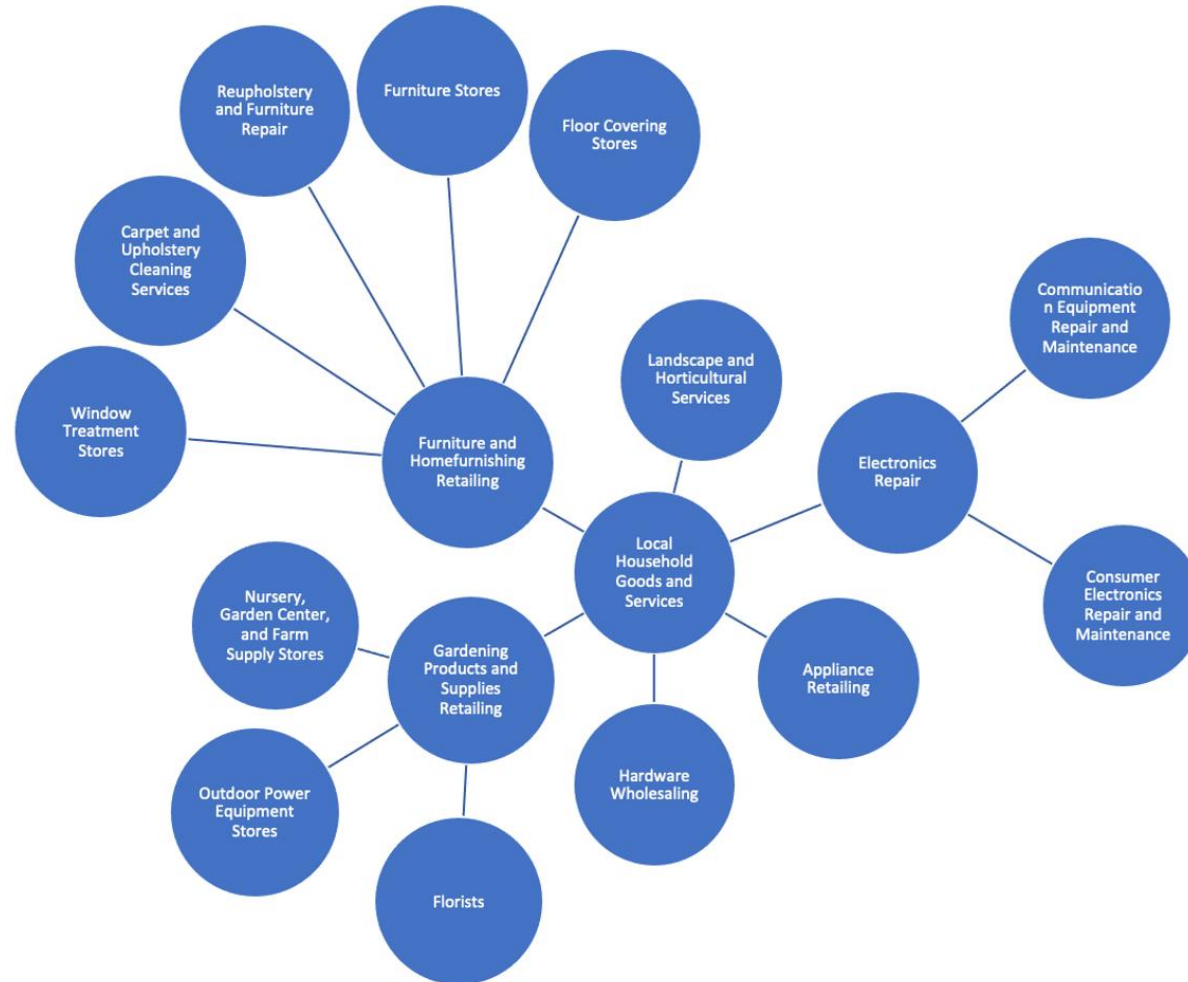


## Hotels





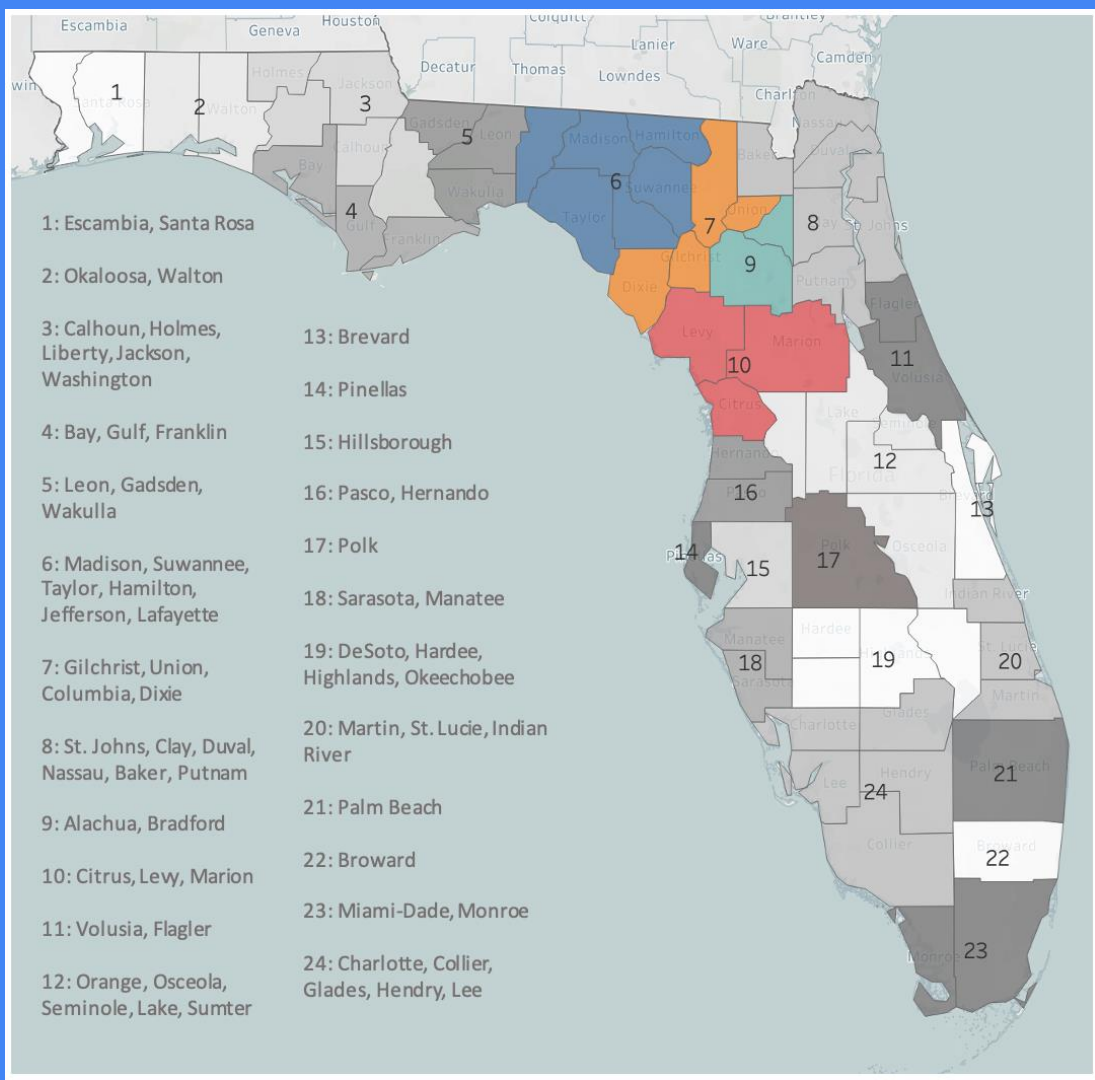
# Landscaping Services



# Regions

# Important connected areas share:

- Commute and geospatial relationship to region 10
- Common industry and occupational drivers
- Or common social components



## Region 9: Alachua and Bradford Counties

- Alachua is a top inflow and outflow county for both Marion and Levy
- Alachua shares 17 out of 20 top occupations with Marion and Citrus and 7 out of 10 top industries
- Healthcare related jobs are a source of high pay and growth for Marion and Citrus, and are in common as a top industry with Alachua
- Bradford county shares 17 out of 20 top occupations
- Elementary and secondary schools are an important industry for Bradford, Alachua, Marion, Levy, and Citrus, as well as local and state government, full and limited-service restaurants, supermarkets, and warehouse clubs, and supercenters.
- Alachua and Bradford fall within an hour drive time limit for parts of Marion county
- Both Levy and Bradford are considered rural areas of opportunity.

## Region 7: Gilchrist, Union, Columbia, and Dixie

- Levy is connected to Dixie, Gilchrist, and Columbia through drive time
- Levy and Columbia are considered rural areas of opportunity/catalyst zones
- Gilchrist is a top inflow and outflow county for Levy and shares 16 out of 20 top occupations in common with Levy and Marion
- Union shares 6 out of 10 most important industries with Levy and Marion, including medical and surgical hospitals
- Union shares 16 out of 20 most important occupations with Marion
- Dixie has 6 industries shared across Levy, Marion, and Citrus, as well as being a top inflow and outflow county for Levy commuters
- Columbia has 18 occupations of importance in common with Marion and overlaps 417 important occupations with Citrus, and 7 industries of importance with Citrus and Levy

## Region 6: Madison, Suwannee, Taylor, Hamilton, and Lafayette

- Madison, Hamilton, and Taylor are all North Central Opportunity Zones alongside Levy
- Hamilton, Taylor, and Madison were all part of the previously referenced Creating Connections program with Levy
- Suwannee and Lafayette also have the advantage of being within a 60-minute commute of Levy
- Levy shares the greatest number of top occupations with Taylor and Bradford
- Levy has the most overlap in industry with Levy, Citrus, Suwannee, and Bradford
- There is an occupational connection between Hamilton and other counties of regional interest (including Suwannee, Dixie, and Gilchrist)
- <sup>42</sup> There is an occupation connection between Hamilton and Levy

# Citations

## Slides 3, 4, 5, 9, 10, 11, and selection of 29 counties

- US Census Bureau 5 Year Estimates: <https://data.census.gov/table?q=S0801:+COMMUTING+CHARACTERISTICS+BY+SEX&g=050XX00US12017,12075,12083&tid=ACSST5Y2021.S0801&moe=false>
- LEHD Origin-Destination Employment Statistics (LODES8, enumerated by 2020 census blocks): <https://lehd.ces.census.gov/data/#lodes>
- CareerSource Labor Shed data (2023 update): <https://www.floridajobs.org/workforce-statistics/data-center/florida-census-data-center/labor-shed-reports>
- 5-year estimates: <https://www.census.gov/data/tables/2020/demo/metro-micro/commuting-flows-2020.html>
- Florida Commerce Summary Tables, "Where Do Workers Live" and "Where Do Workers Work" via Florida Census Data Center: <https://floridajobs.org/workforce-statistics/data-center/florida-census-data-center/florida-census-data-center/county-to-county-worker-flow-files>
- Census Transportation Planning Product (2012-2016, 5 Year Data): <http://ctpp.beyond2020.com/ctpp1216/Browse/ErrorMessage.aspx?ErrMsg=Unpublished&PerspectiveLanguage=en&PerspectiveUserId=&PerspectivePassword=>

## Slides 14, 15, 16, 17, 18, 19, 20, 21, 23, 24, 25, 26

- Lightcast 2023

## Slide 28

- For more on how Kmodes functions: <https://www.analyticsvidhya.com/blog/2021/06/kmodes-clustering-algorithm-for-categorical-data/#89b0>

## Slides 30, 31, 32, 33, 34

- Professor Michael Porter's U.S. Cluster Mapping Project (Harvard): <https://www.clustermapping.us/>
- <https://www.clustermapping.us/sites/default/files/files/page/Traded%20Clusters%20Appendix.pdf>
- <https://www.clustermapping.us/sites/default/files/files/page/Local%20Clusters%20Appendix.pdf>



# COMMUTER PATTERN & OCCUPATIONAL ANALYSIS



September 2023



CareerSource  
CITRUS | LEVY | MARION





Report prepared by:



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## Executive Summary

Most residents of Citrus, Levy, and Marion county commute to work, though a small but significant percentage work from home (6 to 9.2 percent). Of those that commute, 75.3 percent in Citrus and 80.5 percent in Marion stay in-county for their employment, while relatively few in Levy remain in-county for work (42.7 percent). For those that leave their county of residence to find employment, important inflow/outflow counties include Hernando, Sumter, Alachua, Gilchrist, and Lake, although a number of other counties nearby share a relationship as well.

Twenty-nine counties have been identified with important spatial or social connection to Citrus, Levy, and Marion. Top occupations and industries for employment and pay in Marion, Citrus and Levy overlap significantly, as well as overlapping a great deal with the other 29 counties of interest. Broadly speaking industry clusters focus on areas of local education/training, hospitality, health services, local retail, agriculture, and household goods and services. Those industries with a current foothold in the area can be expanded into other fields with enough overlap in skills, technology, and other capabilities.

### Key Findings:

#### Commute:

- Most in Citrus, Levy, and Marion commute by car, truck or van
- Between 6 and 9.2 percent work from home
- Average commute time < 30 minutes, but many spend 30-60 minutes, particularly Levy county
- 75.3 percent of Citrus residents don't leave their county for work, 80.5 percent for Marion, and 42.7 percent for Levy
- Citrus and Levy have a large inflow and outflow to/from Marion
- Other important inflow/outflow counties include Hernando, Sumter, Alachua, Gilchrist, and Lake

#### Jobs Providers in Citrus/Marion/Levy:

- Top job providers for Citrus, Marion, and Levy include Sales, Office and Administrative Support, Food Preparation And Serving, Transportation And Moving
- Healthcare and technical occupations provide many jobs and pay comparatively well in Citrus and Marion counties
- Top industries within a 60-minute drive of Marion, Citrus, and Levy overlap considerably and include Retail Salespersons, Customer Service Representatives, Stockers and Order Fillers, Registered Nurses, Cashiers, Office Clerks, General, General and Operations Managers, Fast Food and Counter Workers, and Waiters and Waitresses

### Commonalities Between 29 Associated Counties:

- There are 29 counties with important spatial or cultural relationships with Citrus, Levy, and Marion
- Top occupations overlapping across those 29 counties include Retail Sales Workers, Material Moving Workers, Food And Beverage Serving Workers, Management Occupations, Installation, Maintenance, And Repair Occupations, Cooks And Food Preparation Workers, Healthcare Diagnosing Or Treating Practitioners, Top Executives, and Health Technologists And Technicians
- All three counties show a substantial occupational and industry overlap
  - Levy has comparatively low overlap across the 29 counties, but shares the greatest number of top occupations with Taylor and Bradford counties
  - Marion shows overlap with Clay, Putnam, Columbia, Hernando, Pasco, Lake, Citrus, Flagler, and Volusia counties
  - Citrus shows overlap with Nassau, Clay, Marion, Lake, Flagler, and Volusia counties
- Overarching industry clusters include Local Education/Training, Hospitality, Health Services, Local Retail, Agriculture, and Household Goods and Services and these can be expanded into other fields with enough overlap in capabilities

## Regions

Specific regions chosen for proximity, common occupations/industries, and similar social and cultural components include regions 6, 7, and 9 (as illustrated in figure 1). All regions also benefit from an important interstate travel corridor in common, I-75, shown running through all regions in figure 2.

Specific relationships between Citrus, Levy, and Marion to each individual county within regions 6, 7, and 9 can be found in the “Regional Recommendations” section at the end of this report. These counties include Madison, Suwannee, Taylor, Hamilton, Lafayette, Gilchrist, Union, Columbia, Dixie, Alachua, and Bradford.

Figure 1. Important Regions Within Florida

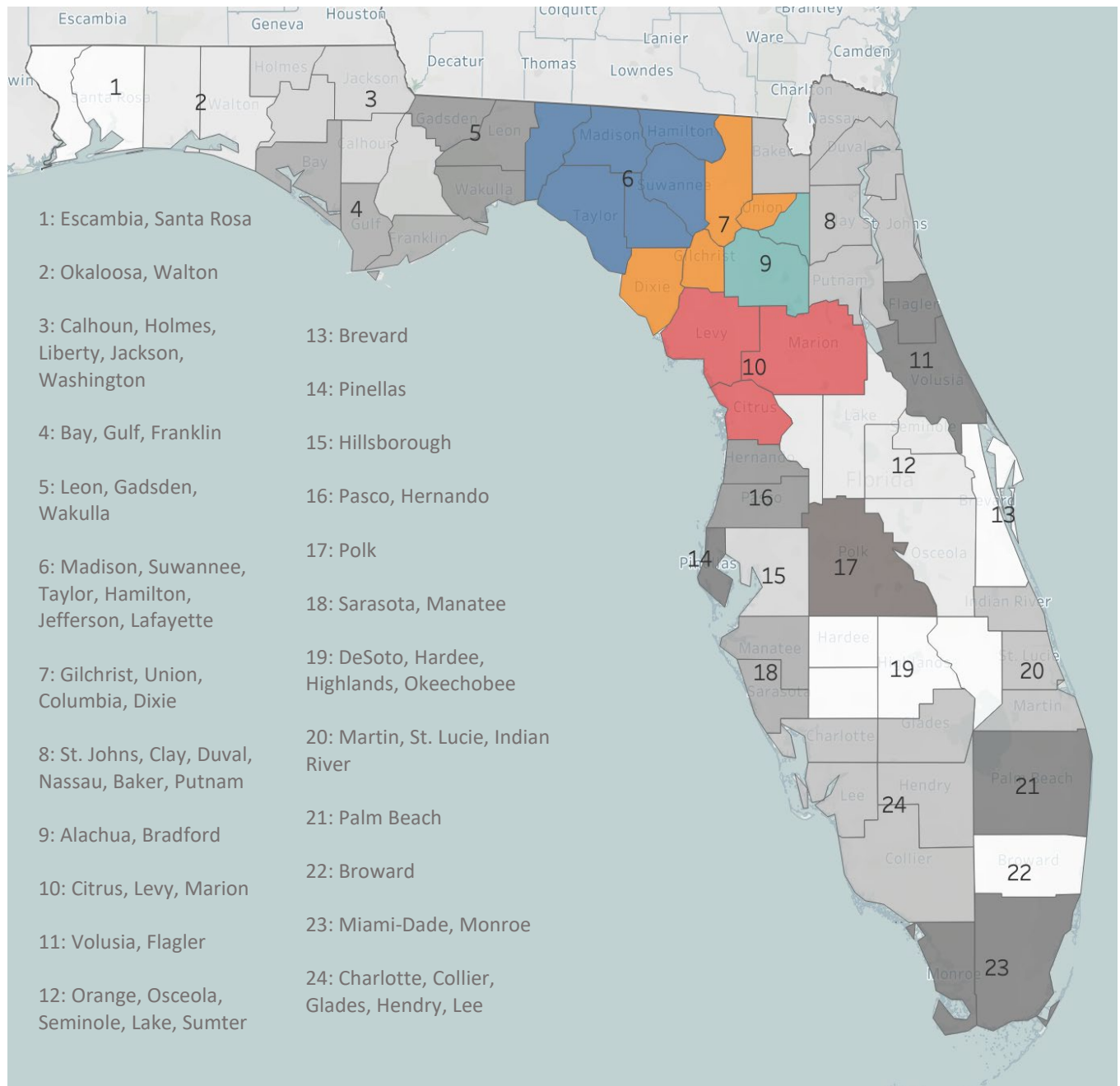
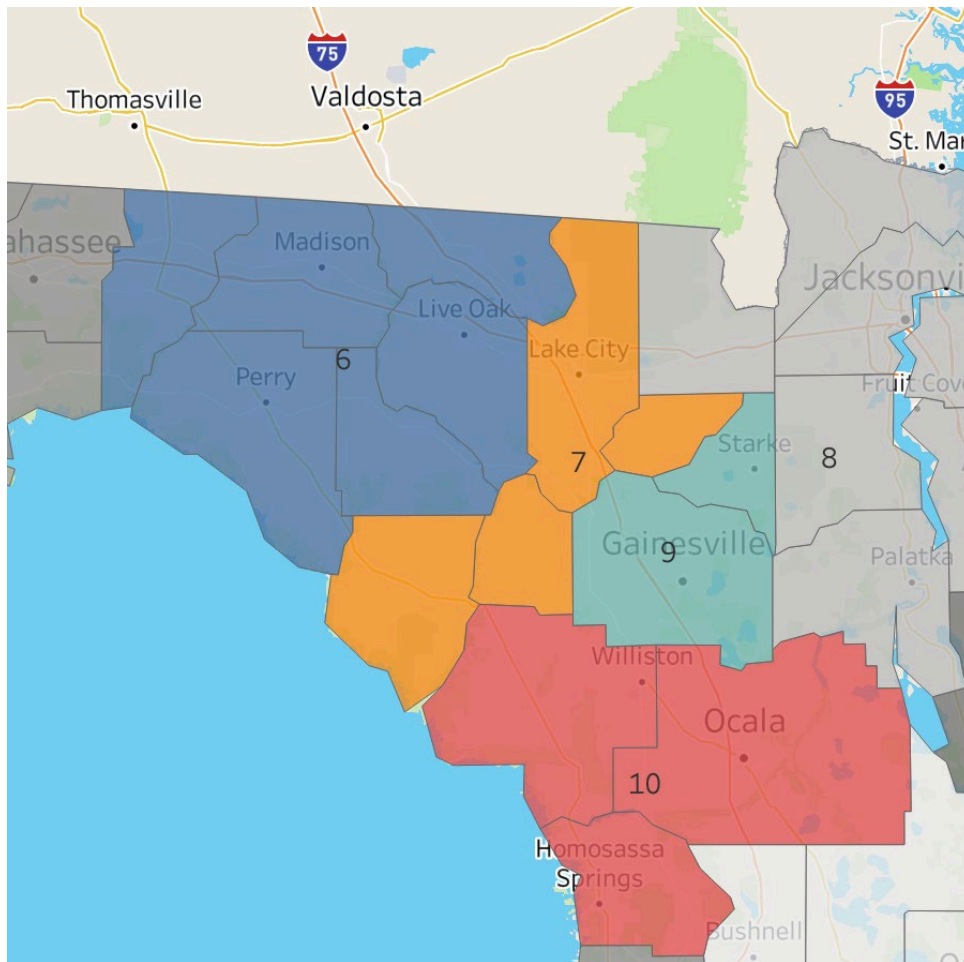


Figure 2. I-75 Route Through Regions 6, 7, 9, and 10



## Commuter Pattern and Occupational Overlap Analysis

The following analysis seeks to accomplish three main goals. First, it provides an analysis of commuting patterns around Citrus, Levy, and Marion counties; how individuals work, where they work, and how they get there. Second, it outlines occupations of importance for those regions based on a few different metrics (growth, number of jobs, pay, etc.) and pulls out major occupations for any area within reasonable driving distance.

The final goal of this report is to flesh out occupations and industries shared in common amongst regions with a relationship to Levy, Marion, or Citrus, and expand on this list into related occupations that could be important. This is accomplished via a cross comparison of top listed occupations and industries, use of a Kmodes clustering algorithm on ranked occupational data, and application of a system of industry clusters and subclusters.

The findings indicate that there are many similarities across the counties of interest, but a few key differences in certain counties as well. Considered broadly, Levy tends to differ from

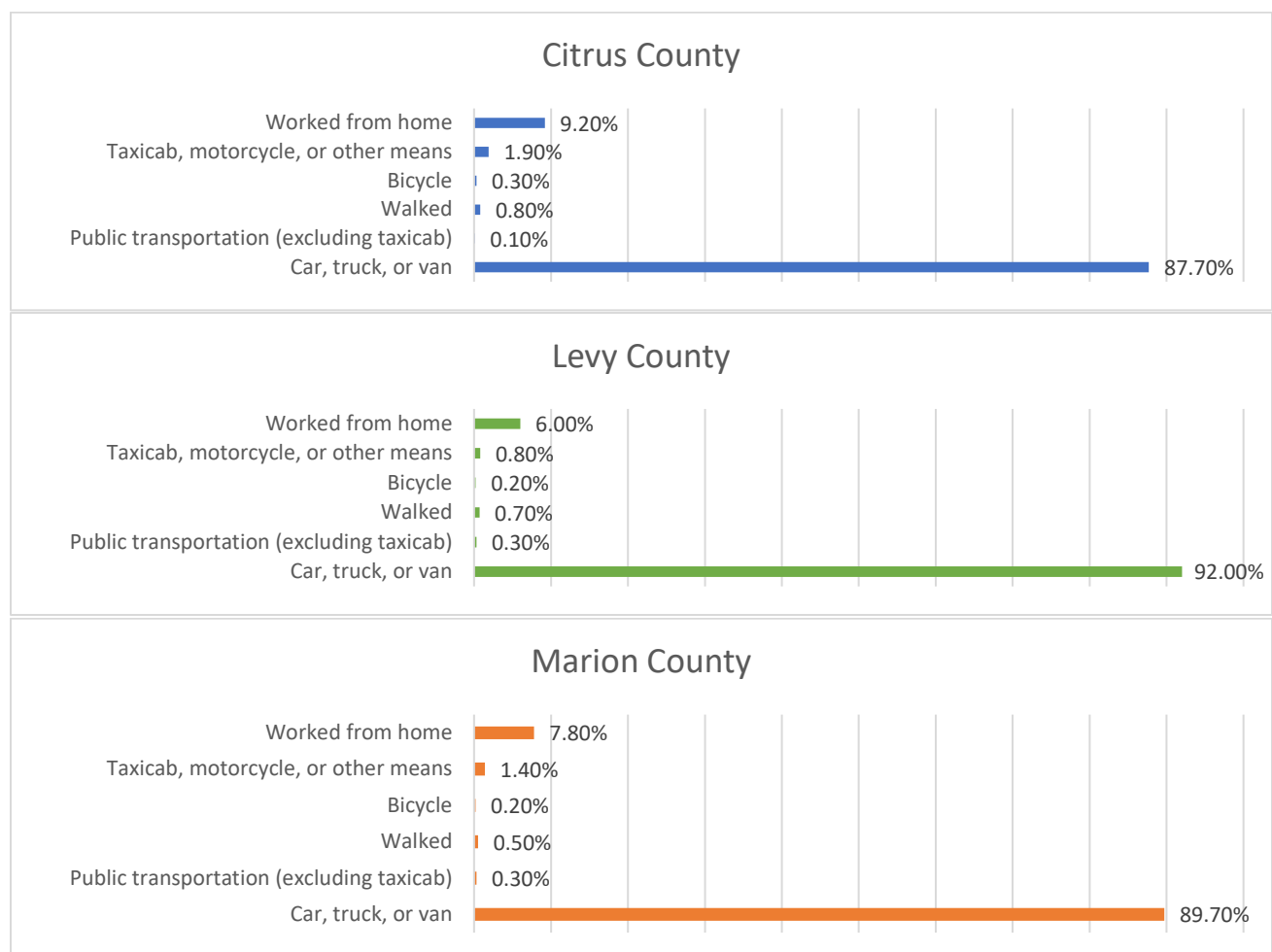
Marion and Citrus more than the two differ from one another, however amongst all considered counties there are many occupations and industries that overlap, and those skills and abilities can be applied in multiple similar industries.

## Distance and Mode of Transit

### Commute Method<sup>1</sup>:

The following figures illustrate differences and similarities in commuting methodology across all three counties of interest. A majority of all 3 counties commute by car, truck, or van. All three have a small percentage that carpool (8.1, 11.4, and 10.2% for Citrus, Levy, and Marion counties respectively).

Figure 3. Commute Method By County



<sup>1</sup> US Census Bureau 5 Year Estimates: S0801

<https://data.census.gov/table?q=S0801:+COMMUTING+CHARACTERISTICS+BY+SEX&g=050XX00US12017,12075,12083&tid=ACST5Y2021.S0801&moe=false>

## Commute Time:

Mean travel time for all 3 counties was just under 30 minutes at 27.7, 29.5, and 26.2 minutes for Citrus, Levy, and Marion counties.

Figure 4. Time of Commute By County

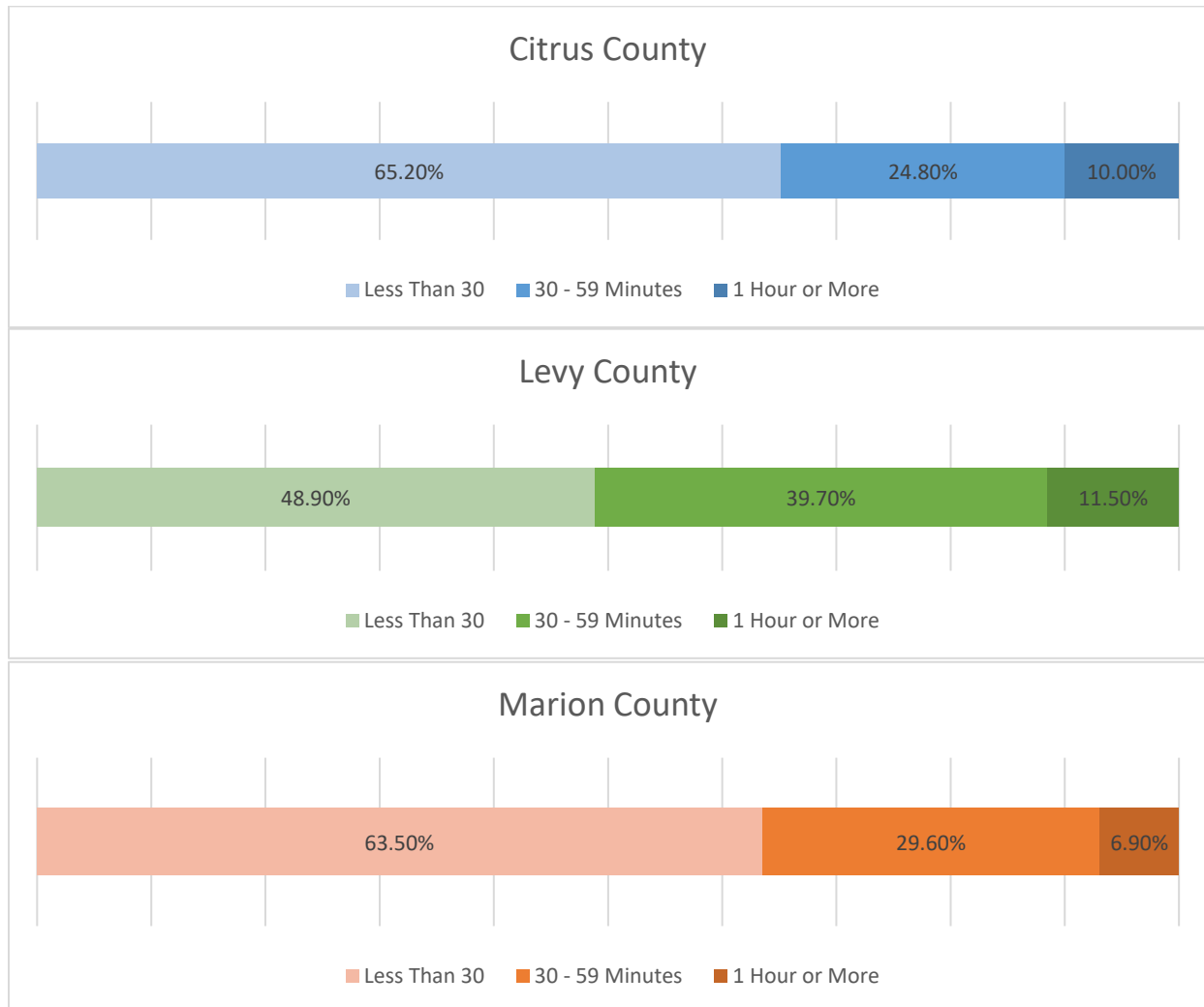


Table 1. Percent Working In County of Residence

	Citrus County	Levy County	Marion County
Worked in state of residence	98.70%	99.60%	99.10%
Worked in county of residence	75.30%	42.70%	80.50%
Worked outside county of residence	23.40%	56.90%	18.60%



## Commuting Patterns and County Connections:

Commuting patterns were examined across 5 different datasets, including LODES<sup>2</sup>, CareerSource Labor Shed data<sup>3</sup>, 2016-2020 5-Year ACS Commuting Flows<sup>4</sup>, FloridaCommerce County-to-County Worker Flow<sup>5</sup>, and Census Transportation Planning Product data (CTPP)<sup>6</sup>. Each data set presents advantages and downsides in terms of size, error, and time frame; by cross comparing the goal is to reduce errors and take advantage of all available insights. Figures 5 through 10 show top counties of worker inflow and outflow for Citrus, Levy, and Marion counties. Top counties were determined by first ranking counties in each dataset, and then cross comparing. Percentages represent averages across all data sets.

### Citrus

Citrus sees the greatest inflow from Hernando and Marion counties, and the greatest outflow out of Citrus into Marion and Sumter counties. However, a majority of its residents work within Citrus rather than commuting outside.

<sup>2</sup> LEHD Origin-Destination Employment Statistics (LODES8, enumerated by 2020 census blocks): <https://lehd.ces.census.gov/data/#lodes>

<sup>3</sup> CareerSource Labor Shed data (2023 update): <https://www.floridajobs.org/workforce-statistics/data-center/florida-census-data-center/labor-shed-reports>

<sup>4</sup> Table 1, 5-year estimates: <https://www.census.gov/data/tables/2020/demo/metro-micro/commuting-flows-2020.html>

<sup>5</sup> Florida Commerce Summary Tables, "Where Do Workers Live" and "Where Do Workers Work" via Florida Census Data Center: <https://floridajobs.org/workforce-statistics/data-center/florida-census-data-center/florida-census-data/county-to-county-worker-flow-files>

<sup>6</sup> Census Transportation Planning Product (2012-2016 5 Year Data): <http://ctpp.beyond2020.com/ctpp1216/Browse/ErrorMessage.aspx?ErrMsg=Unpublished&PerspectiveLanguage=en&PerspectiveUserId=&PerspectivePassword=>

Figure 5. Top 5 Inflow and Outflow for Citrus County By Percent of Worker/Resident

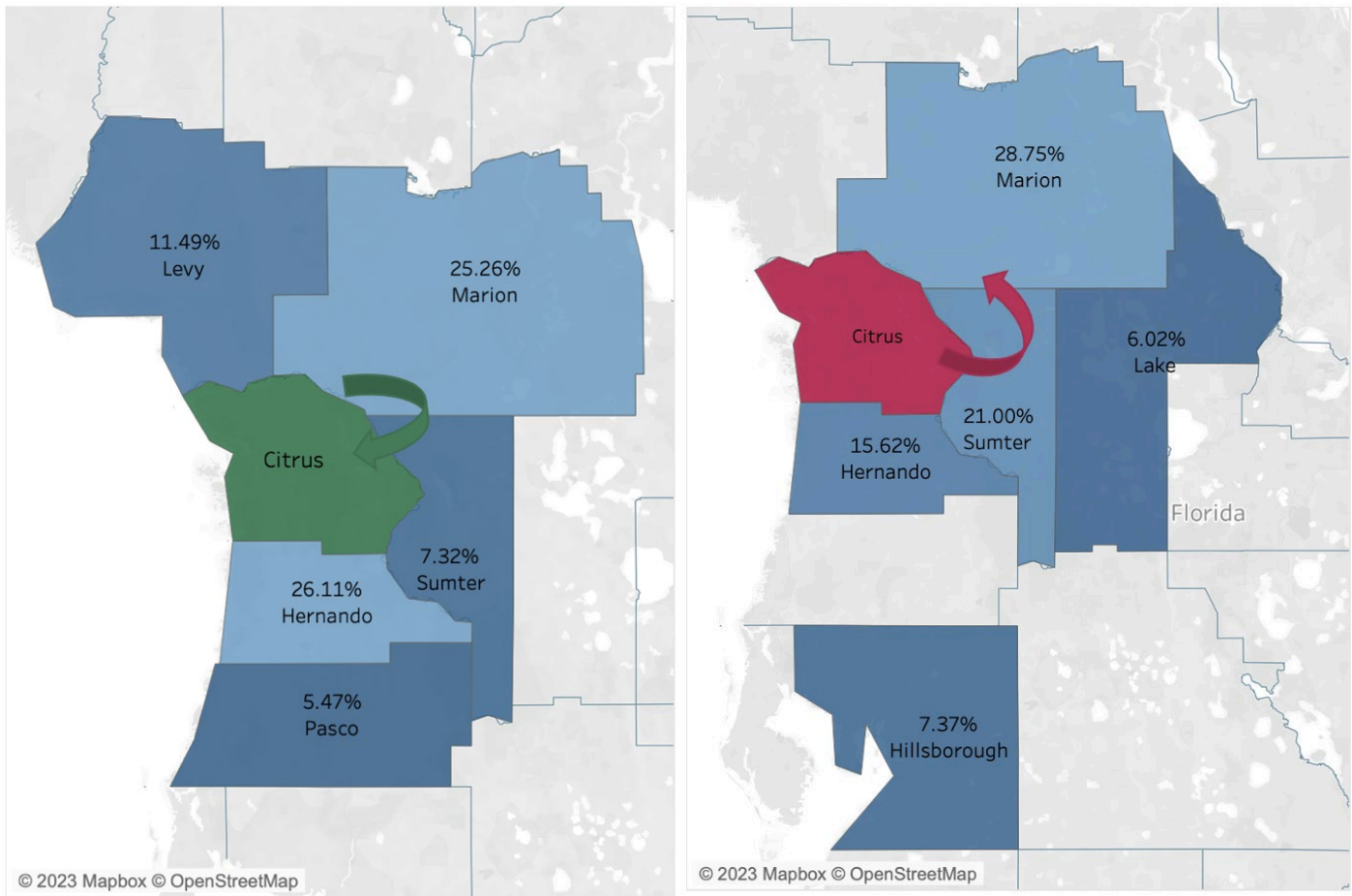
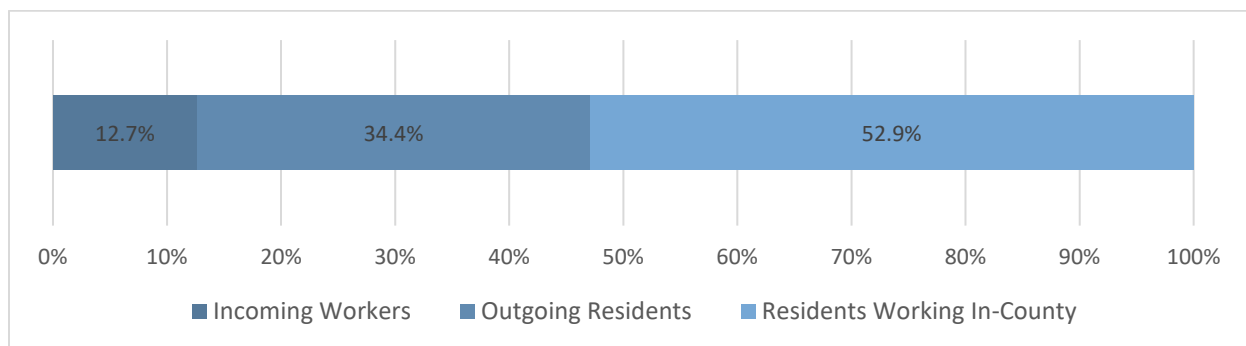


Figure 6. Proportion of Incoming, Outgoing, and In-County Workers



## Levy

Levy sees the greatest inflow from Alachua, Gilchrist, and Marion counties, and the greatest outflow out of Levy into Alachua and Marion counties. Unlike Citrus, a majority of its residents leave their home county for work.

Figure 7. Top 5 Inflow and Outflow for Citrus County By Percent of Worker/Resident

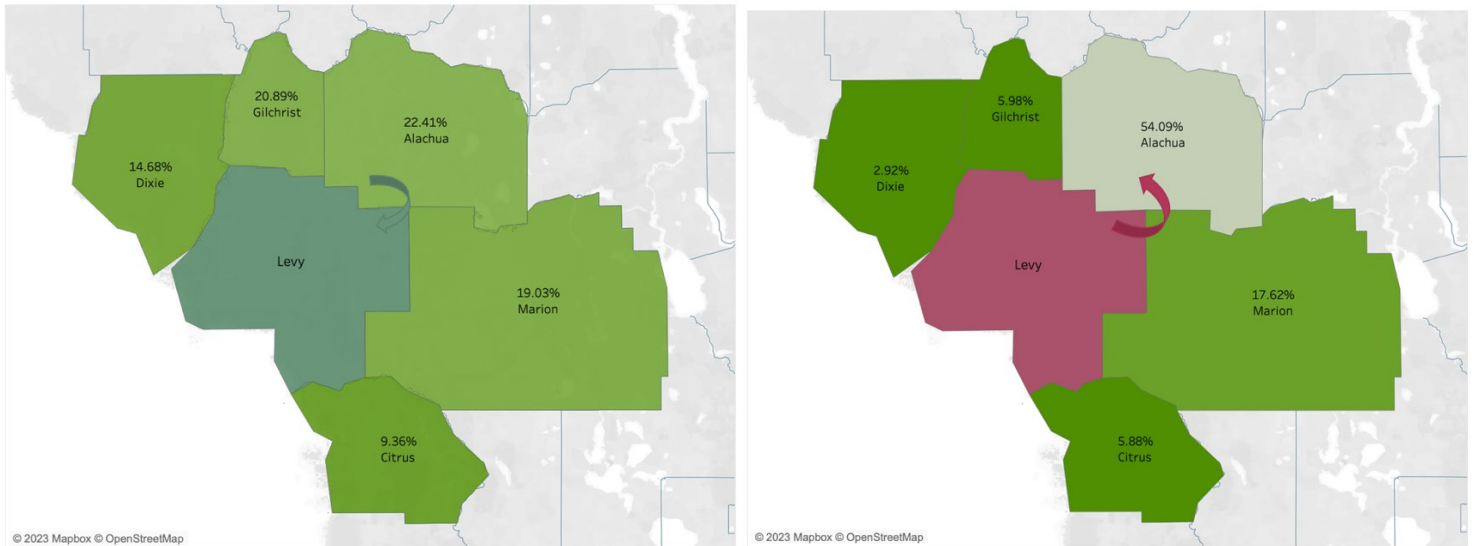
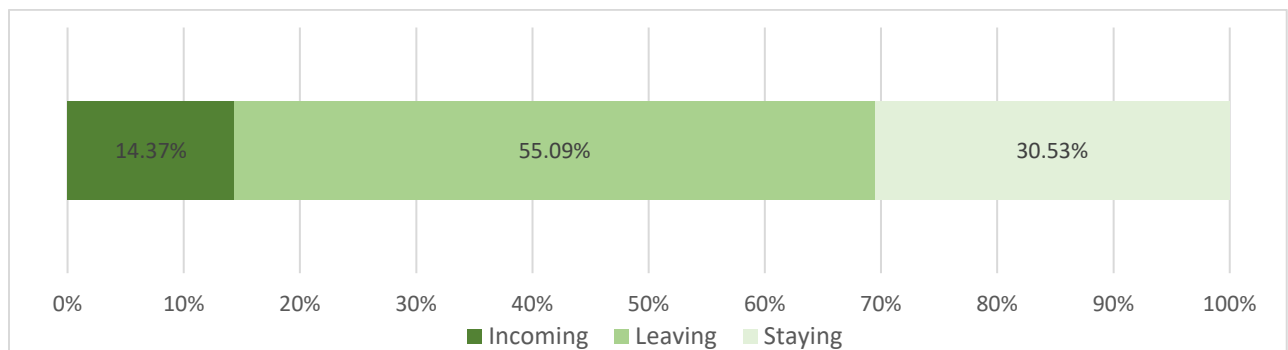


Figure 8. Proportion of Incoming, Outgoing, and In-County Workers



## Marion

Most workers coming into Marion are coming from Citrus, Levy, and Alachua counties, and the greatest number leaving are going to work in Sumter, Alachua, and Lake counties. Similarly to Citrus, a majority of its residents remain within their home county for work (a total of 58.48 percent compared to 28.95 percent leaving).

Figure 9. Top 5 Inflow and Outflow for Marion County By Percent of Worker/Resident

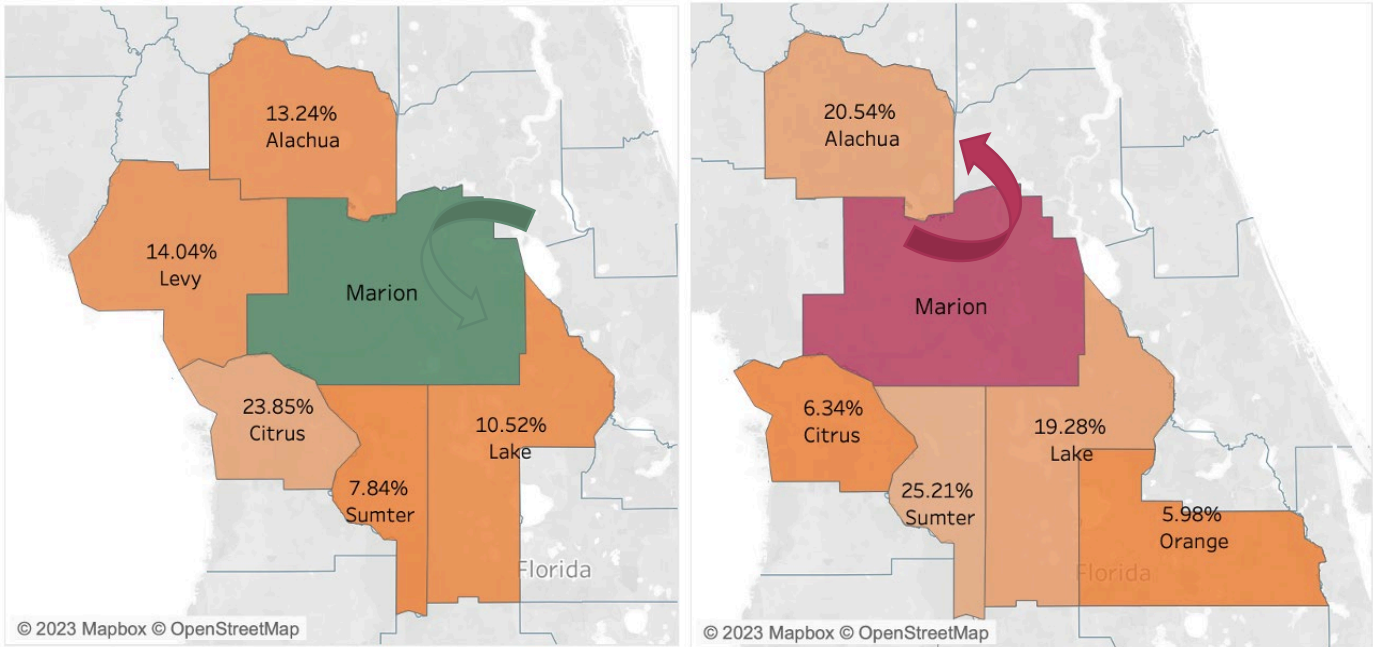
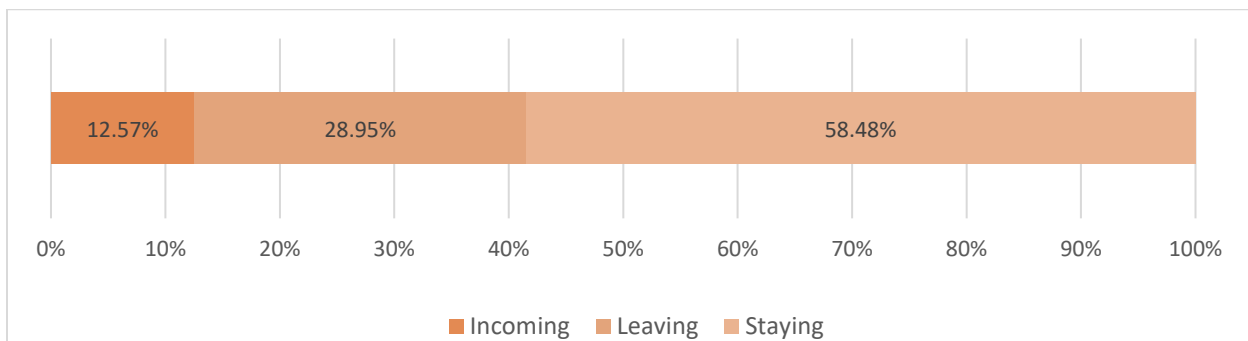


Figure 10. Proportion of Incoming, Outgoing, and In-County Workers



# Occupations and Job Postings for Citrus, Levy, and Marion Counties

Graphics below illustrate leading occupations for Citrus, Levy, and Marion Counties at the 2-digit SOC level based on jobs, pay, growth, competitive effect (i.e. which jobs had much higher growth than expected) and employment concentration.

## Citrus

In Citrus county top job producing occupations include those related to food preparation and serving, office and administrative support, and sales (figure 11), while best paying occupations for Citrus include those related to management, computers and mathematics, and architecture and engineering (figure 12). The best paying occupation that still provides a high number of jobs is in healthcare practitioners and technical occupations; this field also is the fastest growing in Citrus county over the last five years (figure 13). Those occupations with high concentration overlap with competitive effect for Citrus, with sales and office and administrative support leading beside food preparation and serving (figure 14). Educational instruction and library, and construction and extraction both also lead in competitive effect for the region.

Figure 11. Largest Occupations (2018-2023) In Citrus: 2022 Median Hourly Earnings | 2023 Jobs



Figure 12. Highest Paying Occupations (2018-2023) In Citrus: 2022 Median Hourly Earnings | 2023 Jobs

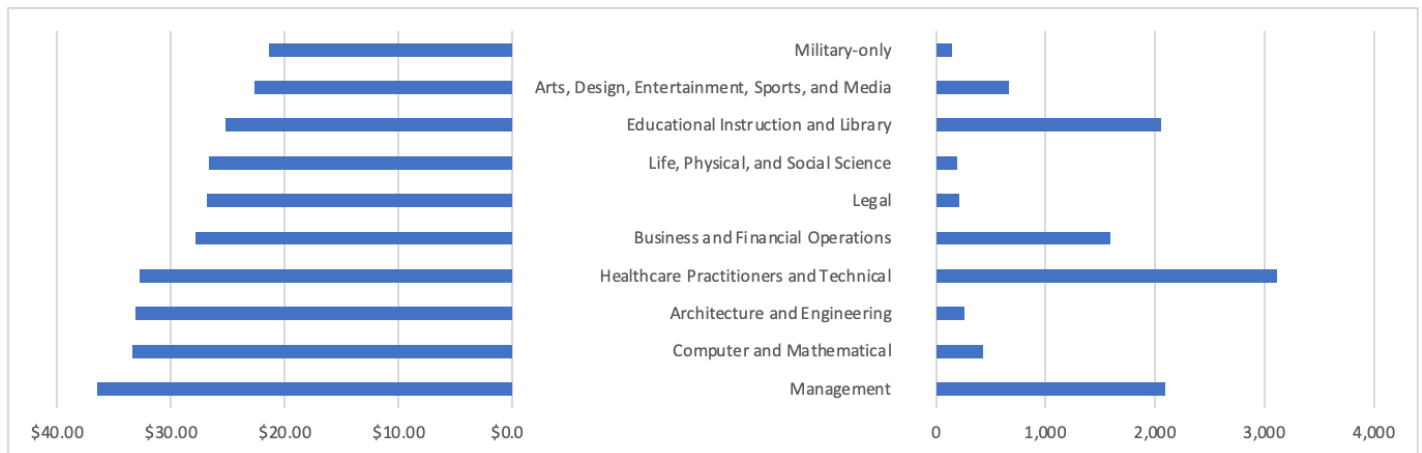


Figure 13. Fastest Growing Occupations (2018-2023) In Citrus

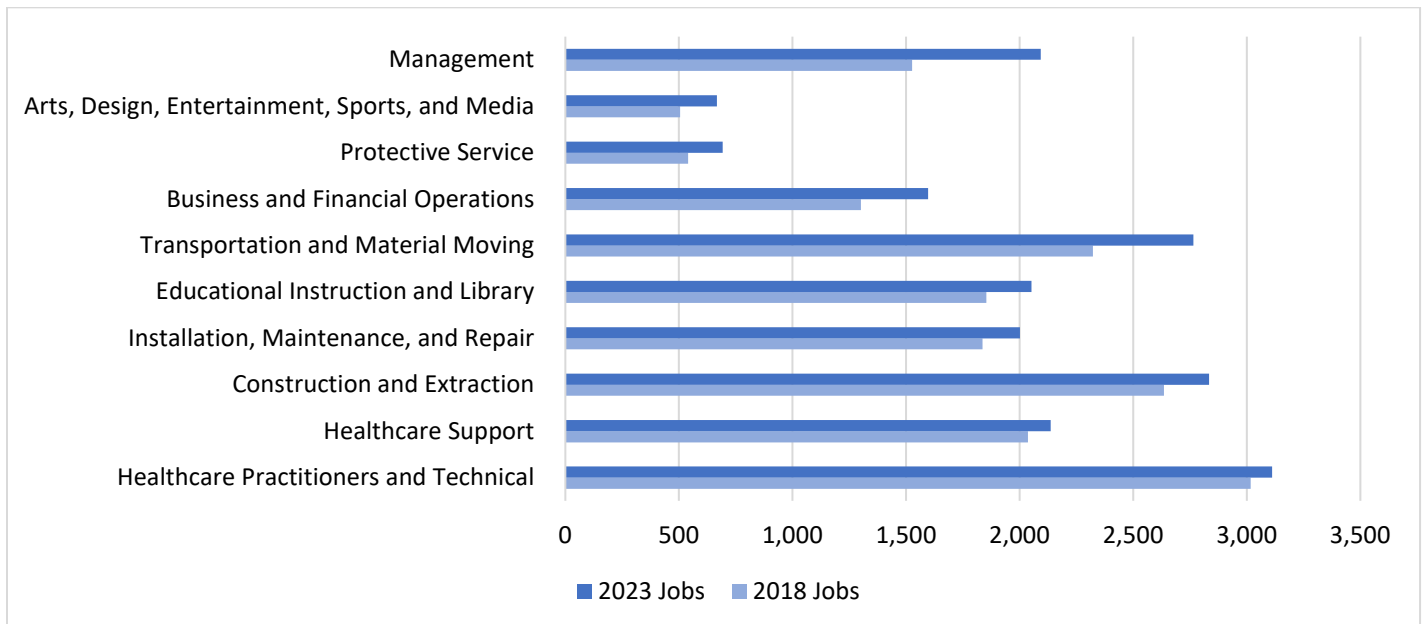
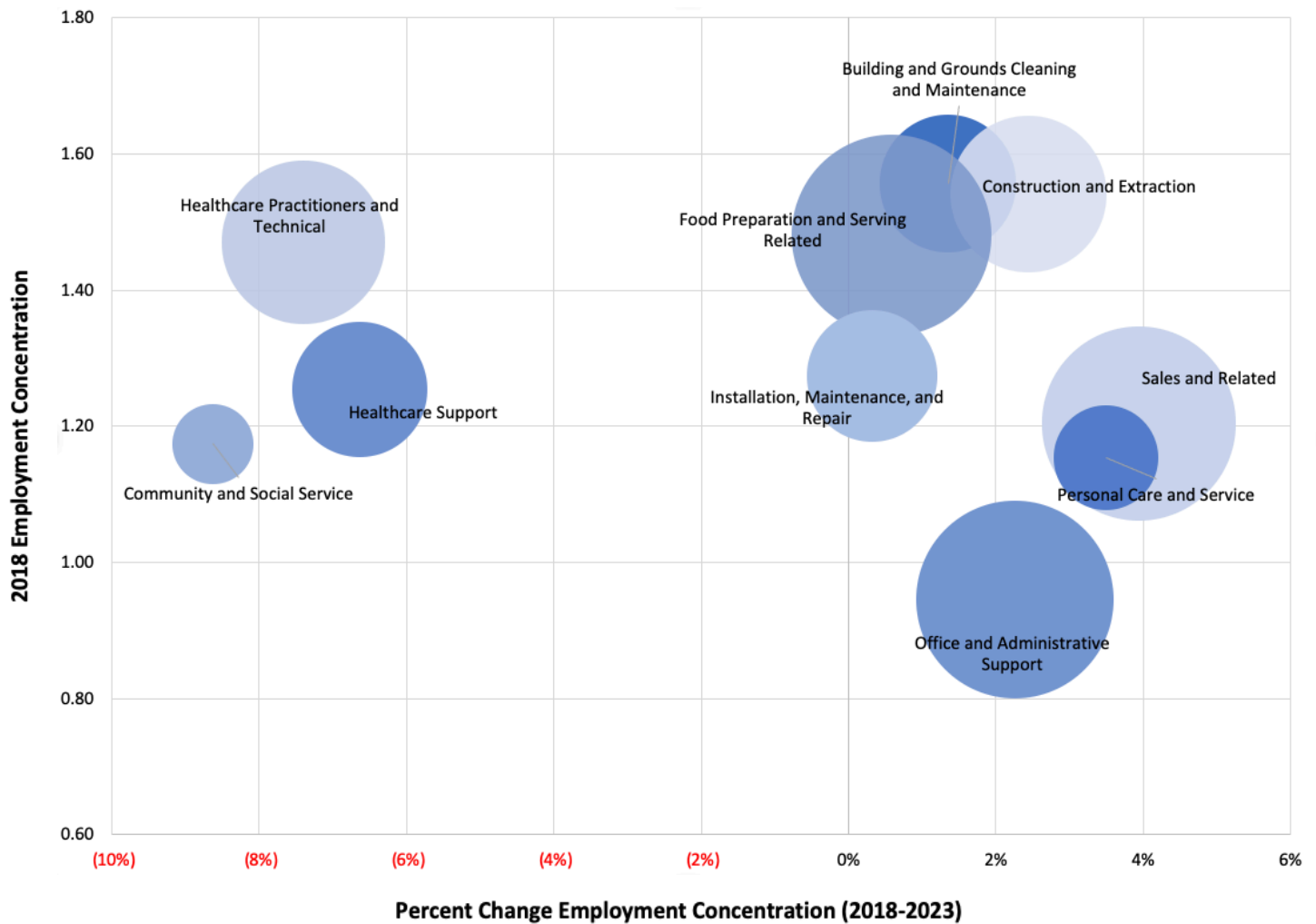


Figure 14. Highest Occupation Employment Concentration In Citrus



Occupation	2018 Jobs	2023 Jobs	% Change	2018 Employment Concentration	2023 Employment Concentration	% Change Employment Concentration	2022 Median Hourly Earnings
Building and Grounds Cleaning and Maintenance Occupations	2,125	2,179	3%	1.56	1.58	1%	\$13.48
Construction and Extraction Occupations	2,636	2,834	8%	1.54	1.58	2%	\$18.56
Food Preparation and Serving Related Occupations	4,556	4,624	1%	1.48	1.49	1%	\$12.40
Healthcare Practitioners and Technical Occupations	3,018	3,111	3%	1.47	1.36	(7%)	\$32.72
Installation, Maintenance, and Repair Occupations	1,837	2,002	9%	1.27	1.28	0%	\$18.64

Healthcare Support Occupations	2,037	2,136	5%	1.25	1.17	(7%)	\$14.07
Sales and Related Occupations	4,317	4,352	1%	1.20	1.25	4%	\$14.04
Community and Social Service Occupations	748	746	(0%)	1.17	1.07	(9%)	\$20.80
Personal Care and Service Occupations	1,312	1,265	(4%)	1.15	1.19	3%	\$12.60
Office and Administrative Support Occupations	4,488	4,544	1%	0.95	0.97	2%	\$16.48

Top Companies Posting in Citrus county include HCA Healthcare, Citrus Memorial Hospital, Non-Federal Agency, Community Health Systems Professional Services Corporation, Bravera Health Seven Rivers, CoreCivic, Hernando County School District, state of Florida, Walgreens Boots Alliance, and Lowe's.

Figures 15 and 16 show top skills found in job postings for the area. The top specialized skill of nursing, and the top common skill of customer service reflects the two top posted occupations, registered nurses and retail salespersons (table 2).

Figure 15. Specialized Skills In Citrus Job Postings

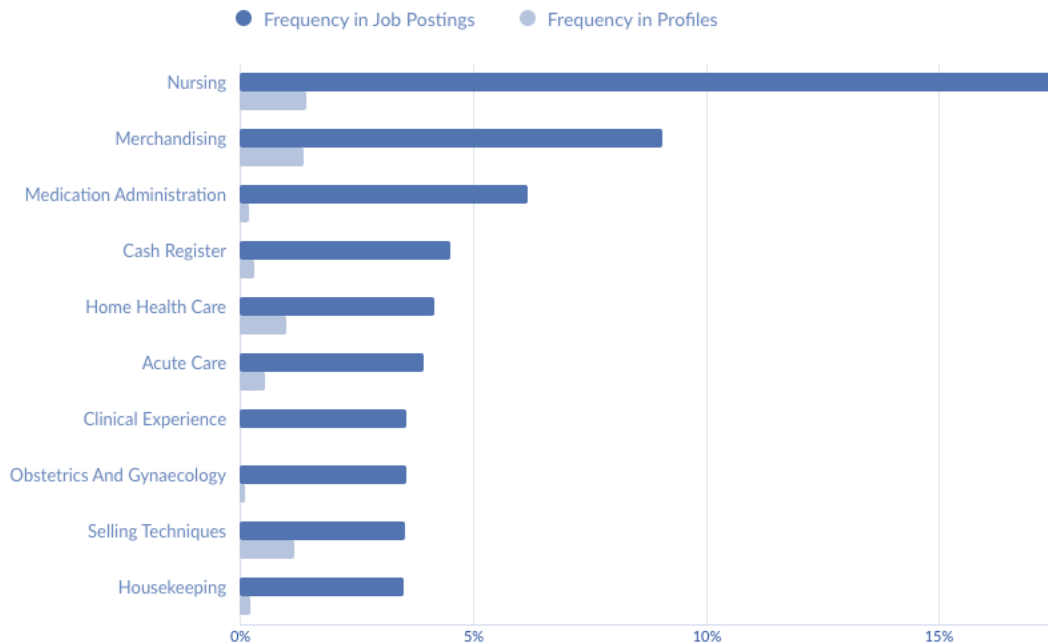




Figure 16. Common Skills In Citrus Job Postings

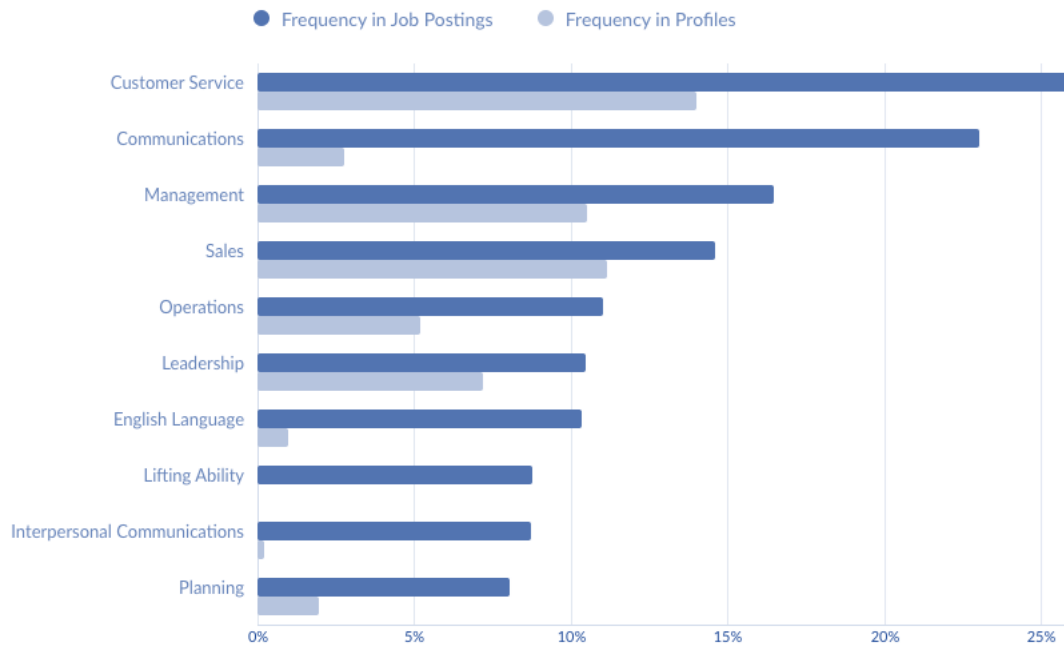


Table 2. Top Posted Occupations and Industries in Citrus

Top Posted Occupations (4-digit)	Unique Posts (Jan 2018 - Dec 2022)	Top Posted Job Titles	Unique Posts	Top Industries	Unique Posts
Registered Nurses	3,239	Registered Nurses	279	General Medical and Surgical Hospitals	2,965
Retail Salespersons	854	Licensed Practical Nurses	266	Employment Placement Agencies	893
Driver/Sales Workers and Truck Drivers	682	Certified Nursing Assistants	246	Nursing Care Facilities (Skilled Nursing Facilities)	853
Nursing Assistants, Orderlies, and Psychiatric Aides	649	Medical Surgical Registered Nurses	229	Home Health Care Services	642
Therapists	647	Crystal Managers	176	Farm Supplies Merchant Wholesalers	601
Laborers and Material Movers	622	Telemetry Registered Nurses	174	Other General Government Support	520
First-Line Supervisors of Sales Workers	572	Customer Service Associates	160	Elementary and Secondary Schools	507
Licensed Practical and Licensed Vocational Nurses	553	Correctional Officers	160	Limited-Service Restaurants	471
Home Health and Personal Care Aides	534	Customer Service Representatives	142	Offices of Physicians (except Mental Health Specialists)	395
Customer Service Representatives	517	Pharmacy Technicians	141	Executive Offices	383

## Marion

Very similarly to Citrus county, Marion county's occupations producing the largest number of jobs include those related to transportation and moving, office and administrative support, and sales (figure 17). Best paying occupations for Marion include those related to management, computers and mathematics, and architecture and engineering, and the best paying occupations still providing a high number of positions is in healthcare practitioners and technical occupations (figure 18).

Office and administration and transportation and material moving are the fastest growing occupations for Marion (figure 19). Occupations with jobs created above or below the expected (competitive effect) for Marion include those related to transportation and material moving, office and administrative support, installation, maintenance, and repair, management, and business and financial operations.

Based on concentration, transportation and material moving has also seen significant growth in the last five years, on top of being one of the largest job producers (figure 20).

Figure 17. Largest Occupations (2018-2023) In Marion: 2022 Median Hourly Earnings | 2023 Jobs

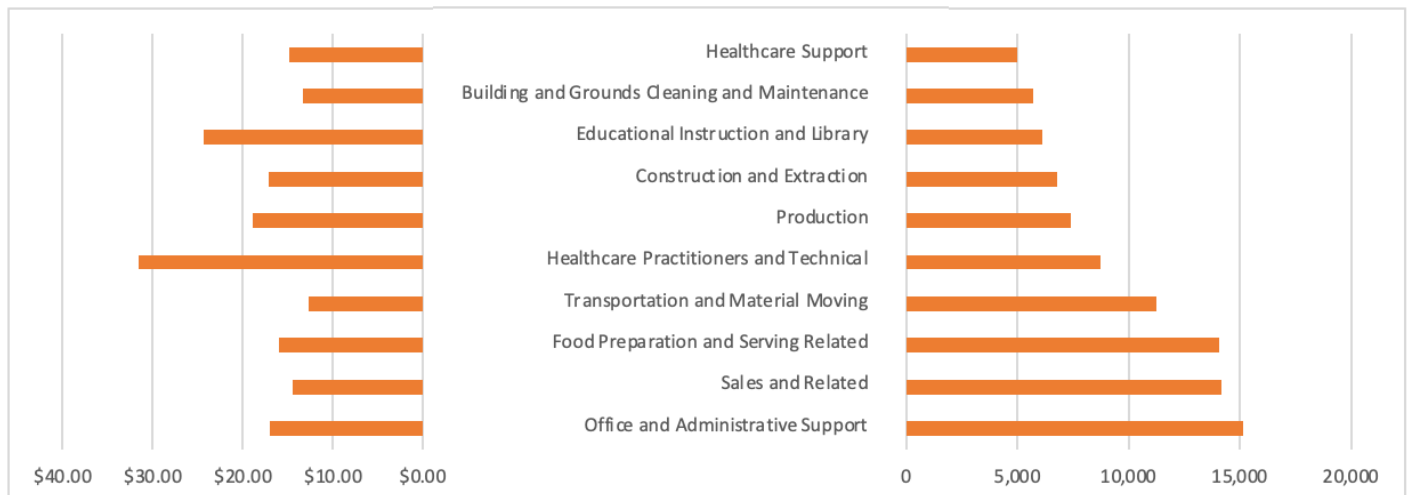


Figure 18. Highest Paying Occupations (2018-2023) In Marion: 2022 Median Hourly Earnings | 2023 Jobs

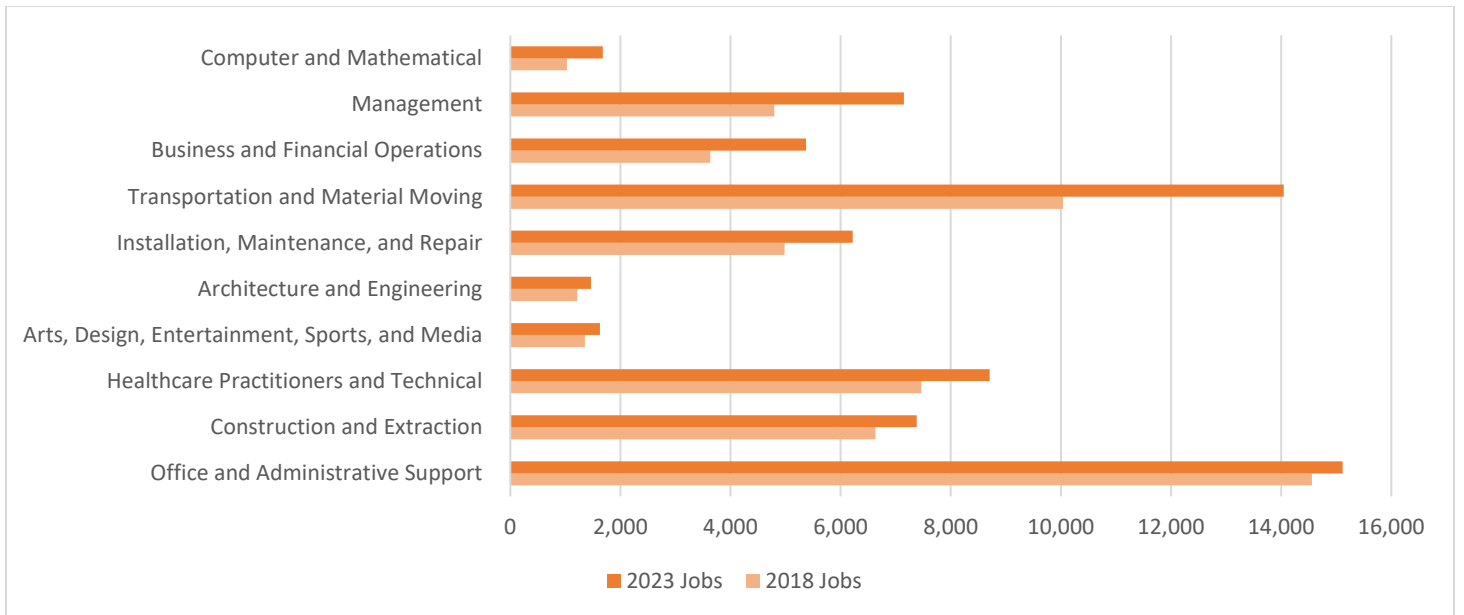


Figure 19. Fastest Growing Occupations (2018-2023) In Marion

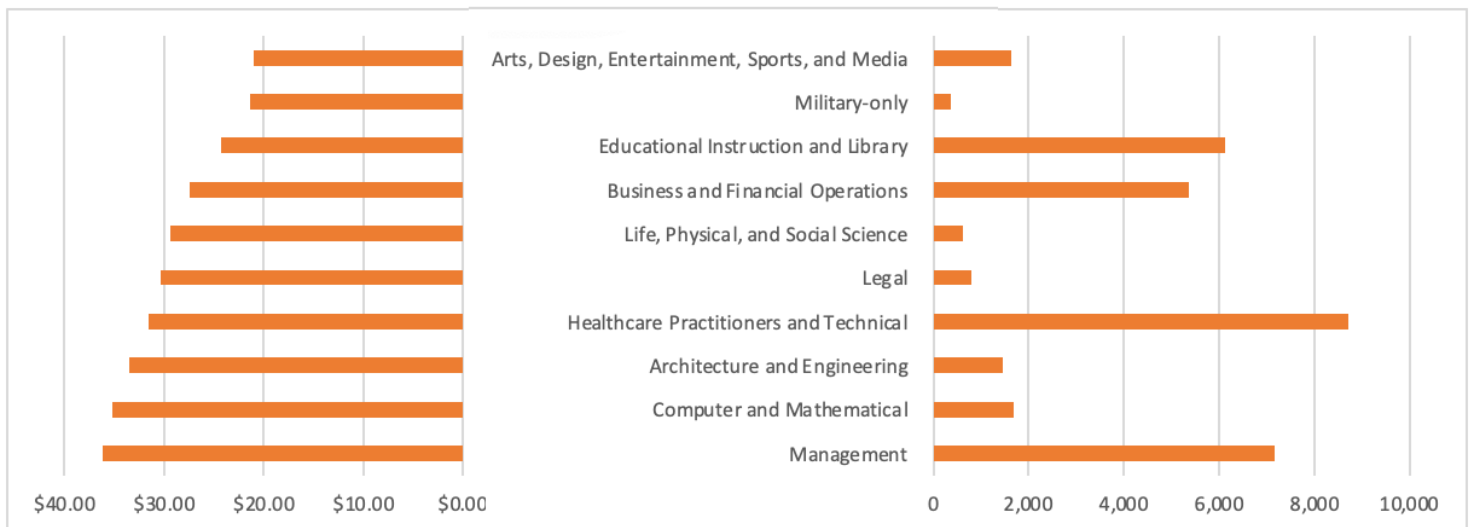
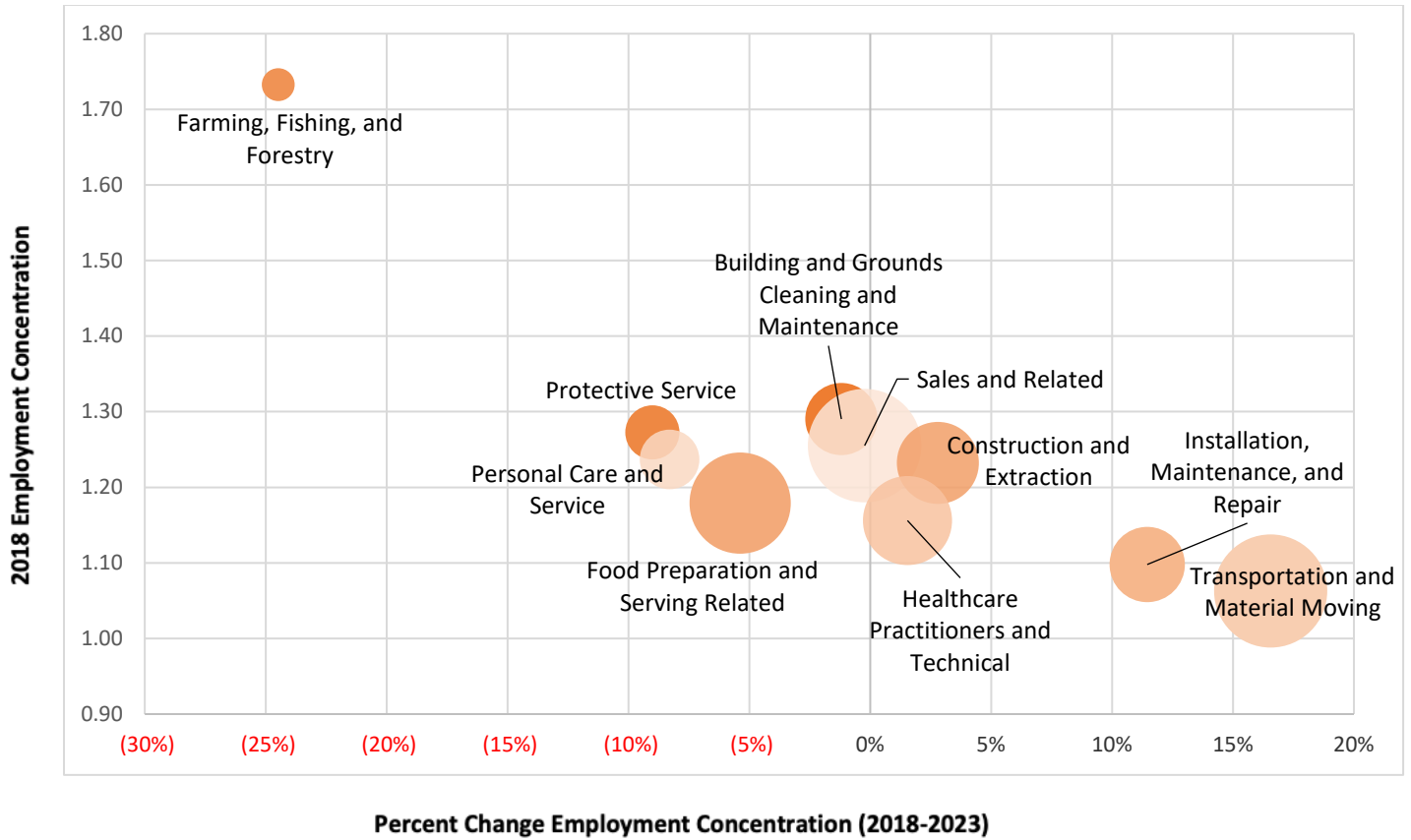


Figure 20. Highest Occupation Employment Concentration In Marion



Construction and Extraction Occupations	6,631	7,380	0.11	1.23	1.27	0.03	\$18.91
Food Preparation and Serving Related Occupations	11,414	11,242	-0.02	1.18	1.12	-0.05	\$12.67
Healthcare Practitioners and Technical Occupations	7,465	8,706	0.17	1.16	1.17	0.02	\$31.51
Installation, Maintenance, and Repair Occupations	4,980	6,221	0.25	1.10	1.22	0.11	\$20.35
Transportation and Material Moving Occupations	10,038	14,050	0.40	1.06	1.24	0.17	\$16.04

Top Companies Posting in Marion county include AdventHealth, Elevance Health, HCA Healthcare, the state of Florida, Ocala Regional Medical Center, Lowe's, Lockheed Martin, Adventist Health, Hospice of Marion County, and Chewy.

Figure 21 and 22 show top skills found in job postings for the area and a similar nursing and sales focus to Citrus county in both skills and top job posting occupations (table 3).

Figure 21. Specialized Skills In Marion Job Postings

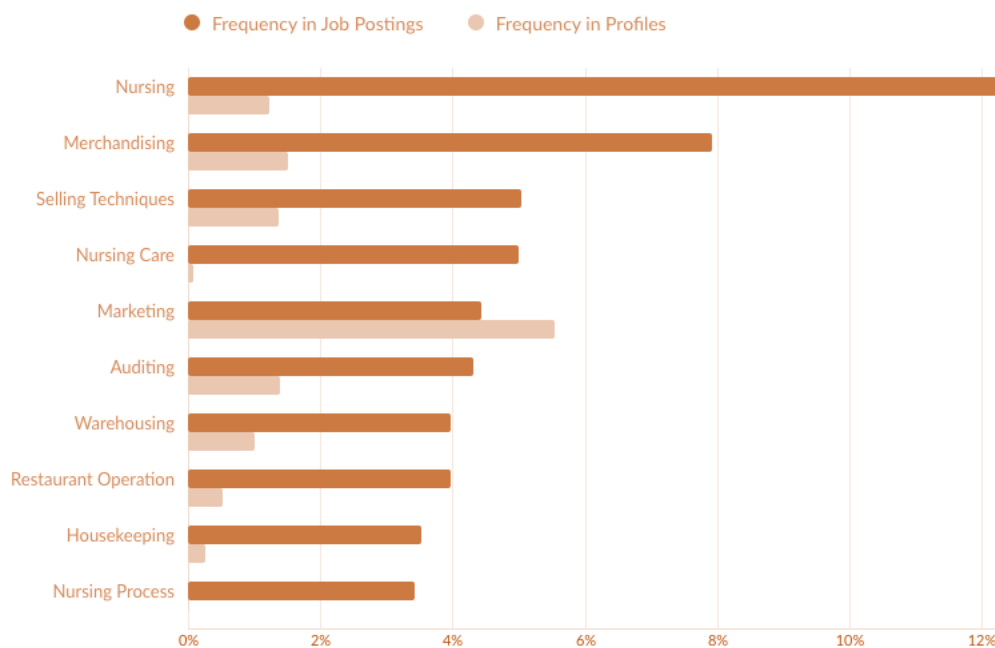


Figure 22. Common Skills In Marion Job Postings

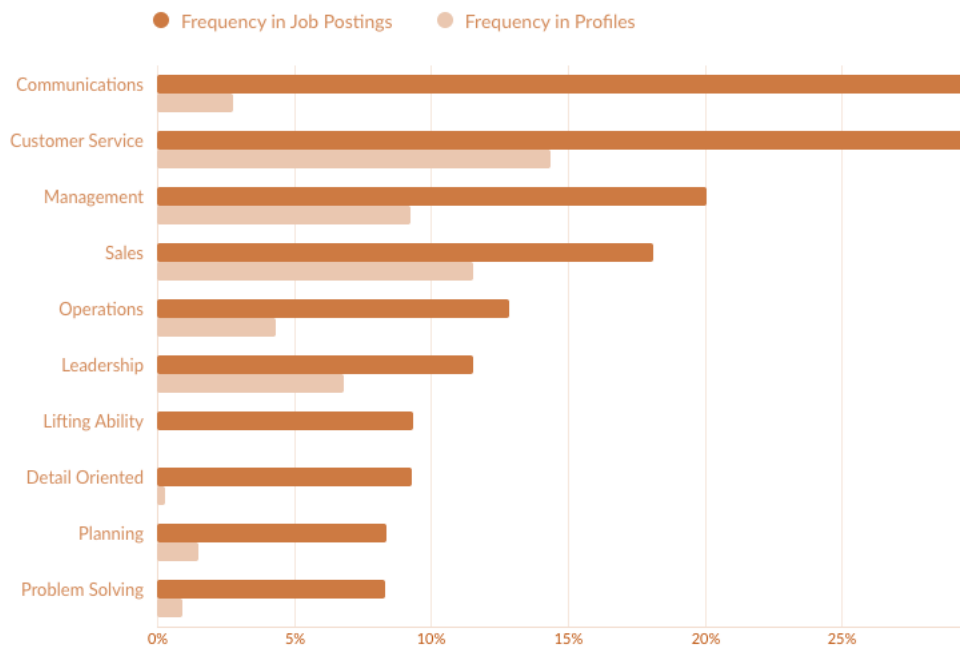


Table 3. Top Posted Occupations and Industries in Marion

Top Posted Occupations (4-digit)	Unique Posts (Jan 2018 - Dec 2022)	Top Posted Job Titles	Unique Posts	Top Industries	Unique Posts
Registered Nurses	10,032	Medical Surgical Registered Nurses	887	General Medical and Surgical Hospitals	12,210
Retail Salespersons	4,240	Registered Nurses	737	Direct Health and Medical Insurance Carriers	4,668
Driver/Sales Workers and Truck Drivers	3,586	Customer Service Representatives	566	Employment Placement Agencies	2,943
Laborers and Material Movers	3,526	Licensed Practical Nurses	564	Offices of Physicians (except Mental Health Specialists)	2,248
Sales Representatives, Wholesale and Manufacturing	3,086	Assistant Managers	528	Full-Service Restaurants	2,159
First-Line Supervisors of Sales Workers	2,898	Sales Associates	521	Home Health Care Services	1,989
Secretaries and Administrative Assistants	2,571	Certified Nursing Assistants	508	Limited-Service Restaurants	1,823
Customer Service Representatives	2,287	Maintenance Technicians	499	Executive Offices	1,745
Medical and Health Services Managers	2,179	Housekeepers	481	Nursing Care Facilities (Skilled Nursing Facilities)	1,650
Nursing Assistants, Orderlies, and Psychiatric Aides	2,115	Delivery Drivers	477	Temporary Help Services	1,445

## Levy

Levy county's top occupations that produce the largest number of jobs include those related to Sales, office and administrative support, and food preparation and serving (figure 23).

Best paying occupations for Levy include those related to management, computers and mathematics, and architecture and engineering, and the best paying occupations still providing a high number of positions is in educational instruction and library occupations (figure 24).

Sales, food preparation and serving, and transportation and material moving occupations are the fastest growing for Levy (figure 25), overlapping with many of the occupations with greatest competitive effect (sales, business and financial operations, food preparation and serving, production, installation, maintenance, and repair occupations). Farming fishing and forestry have been a highly concentrated set of occupations in previous years but have decreased in percent growth over the last five years, whereas sales and food preparation have grown in concentration in recent years.

Figure 23. Largest Occupations (2018-2023) In Levy: 2022 Median Hourly Earnings | 2023 Jobs

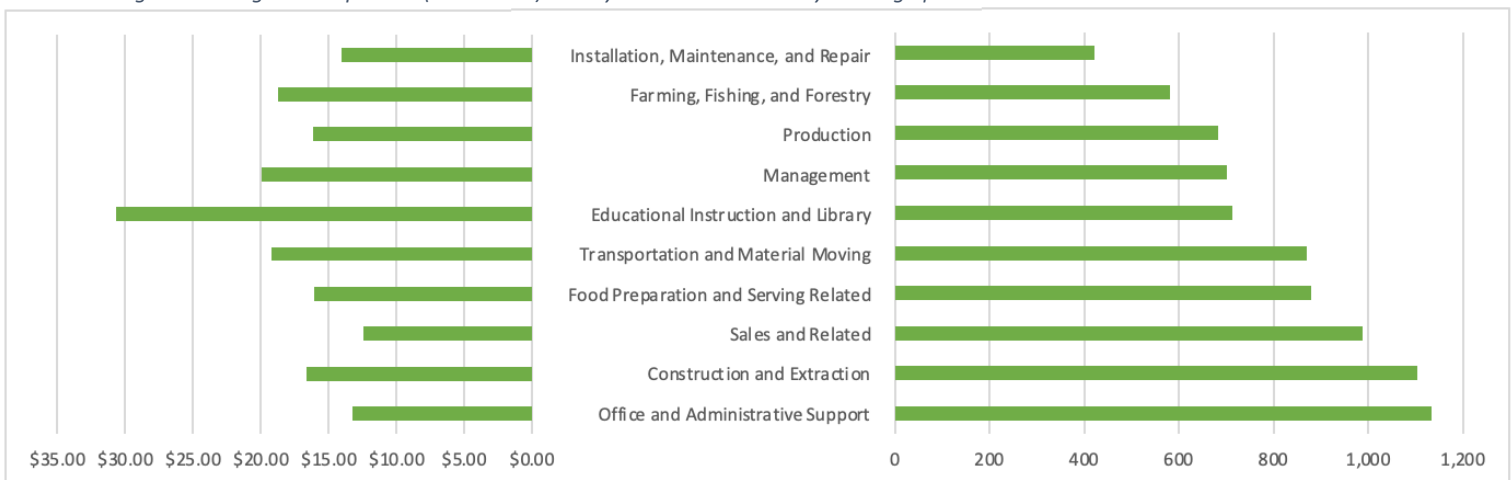


Figure 24. Highest Paying Occupations (2018-2023) In Levy: 2022 Median Hourly Earnings | 2023 Jobs

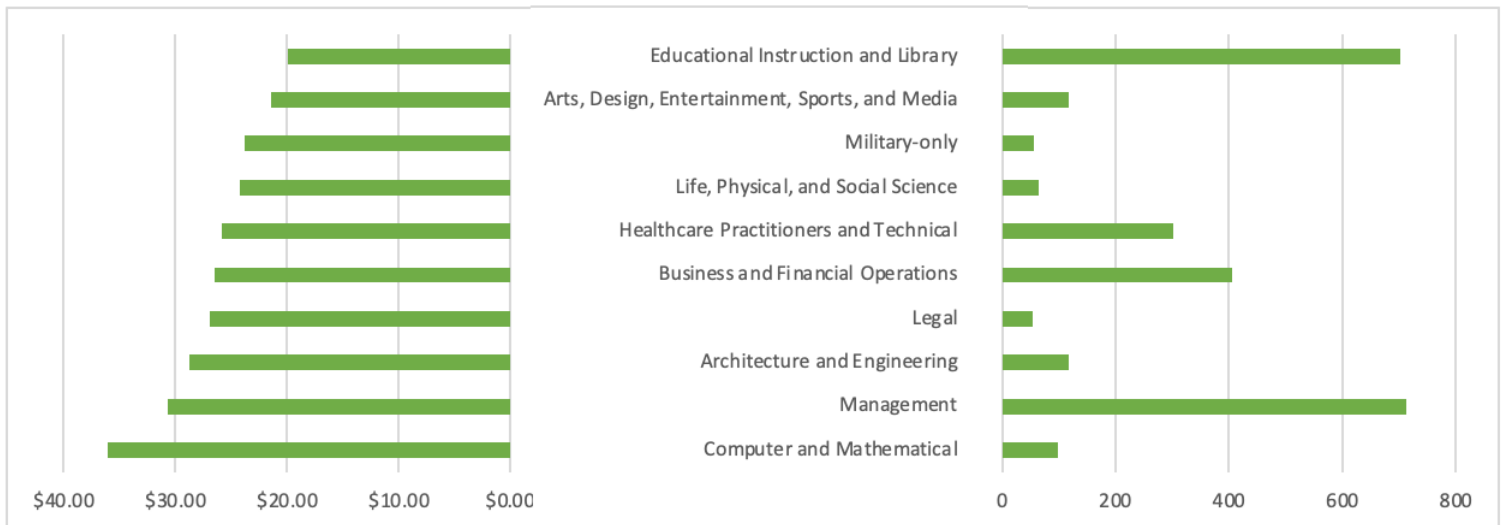


Figure 25. Fastest Growing Occupations (2018-2023) In Levy

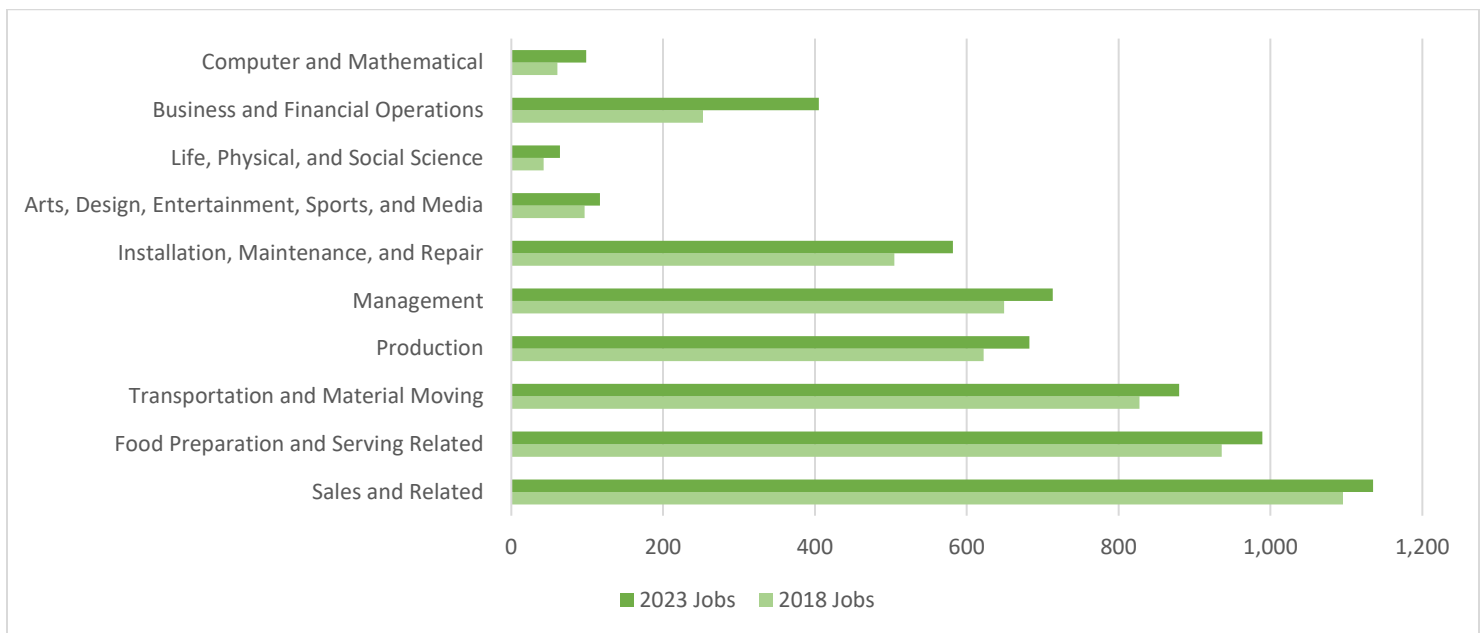
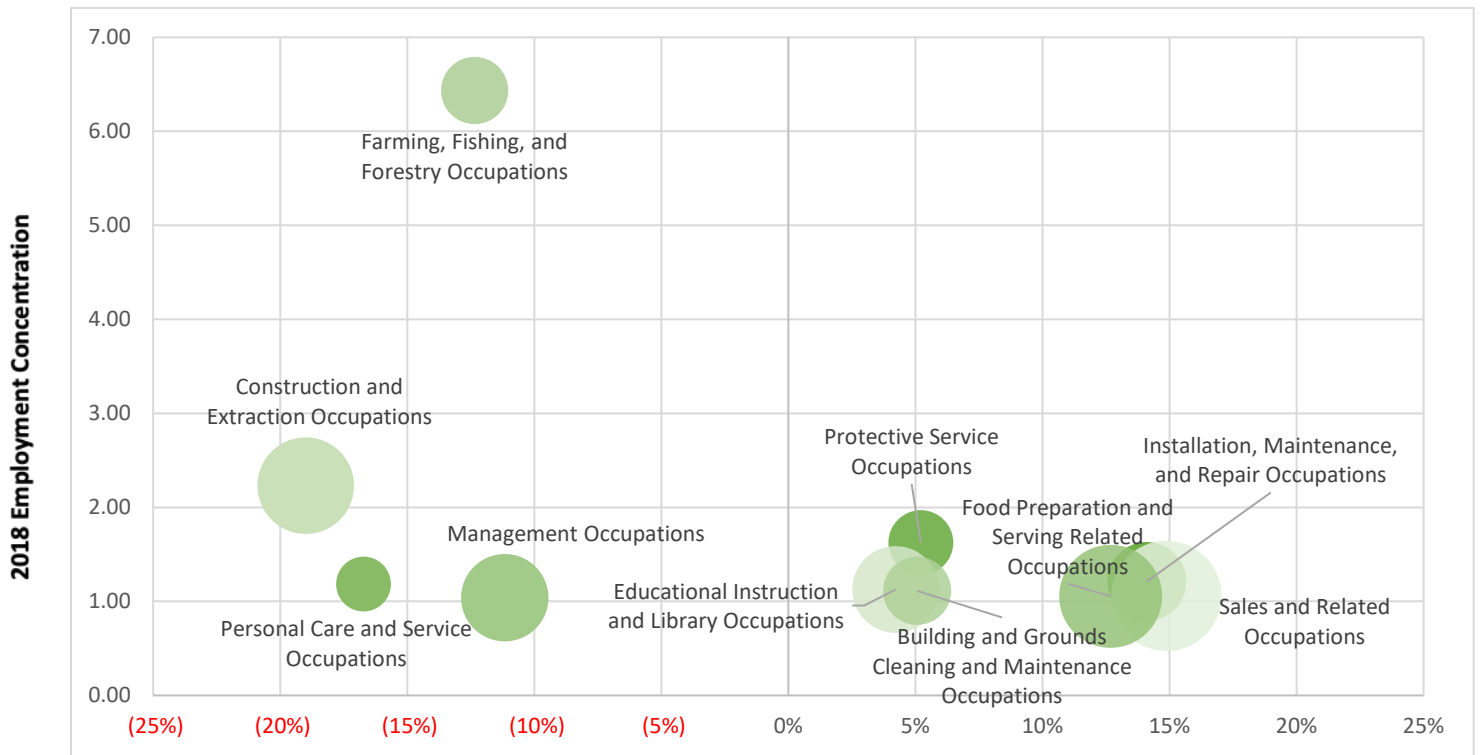




Figure 26. Highest Occupation Employment Concentration In Levy



Percent Change Employment Concentration (2018-2023)

Occupation	2018 Jobs	2023 Jobs	% Change	2018 Employment Concentration	2023 Employment Concentration	% Change Employment Concentration	2022 Median Hourly Earnings
Farming, Fishing, and Forestry Occupations	525	422.02	-0.20	6.43	5.64	-0.12	\$14.09
Construction and Extraction Occupations	1,102	871	-0.21	2.23	1.81	-0.19	\$19.20
Protective Service Occupations	385	393	0.02	1.63	1.71	0.05	\$17.47
Installation, Maintenance, and Repair Occupations	504	581	0.15	1.21	1.38	0.14	\$18.71
Personal Care and Service Occupations	389	281	-0.28	1.18	0.99	-0.17	\$12.86
Educational Instruction and Library Occupations	712	702	-0.01	1.13	1.17	0.04	\$19.91
Building and Grounds Cleaning and Maintenance Occupations	438	433	-0.01	1.11	1.17	0.05	\$13.02
Sales and Related Occupations	1,096	1,135	0.04	1.06	1.22	0.15	\$13.29

Food Preparation and Serving Related Occupations	936	989	0.06	1.05	1.19	0.13	\$12.46
Management Occupations	649	713	0.10	1.04	0.92	-0.11	\$30.65

Top Companies Posting in Marion county include the state of Florida, Winn-Dixie, Dollar General, Southeaster Grocers, School Board of Levy county, Walgreens Boots Alliance, Advance Auto Parts, Tractor Supply, ANCORP, and Walmart.

Figures 27 and 28 show top skills found in job postings for the area. Merchandising and customer service skills are highly posted, and top posting occupations include drivers/sales workers and truck drivers as well as retail salespersons (table 4).

Figure 27. Specialized Skills In Levy Job Postings

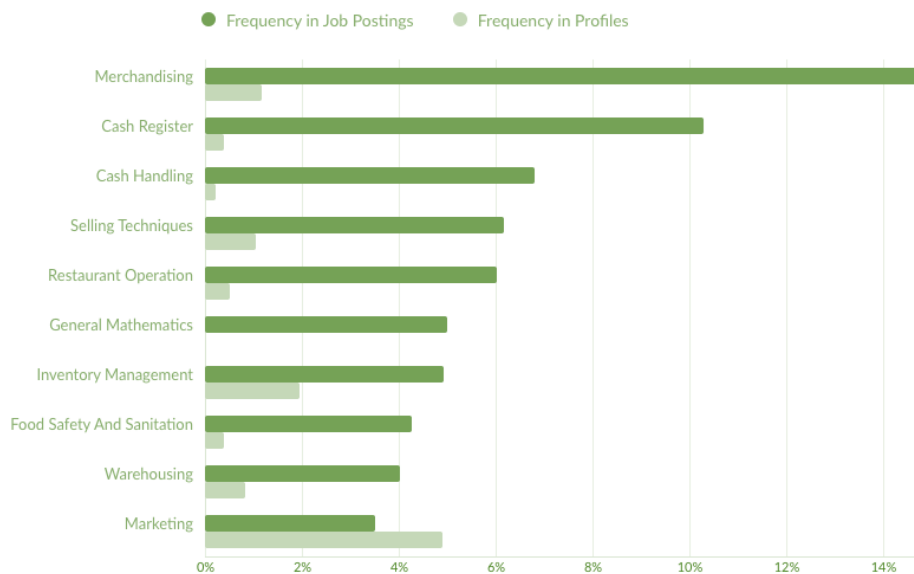


Figure 28. Common Skills In Levy Job Postings

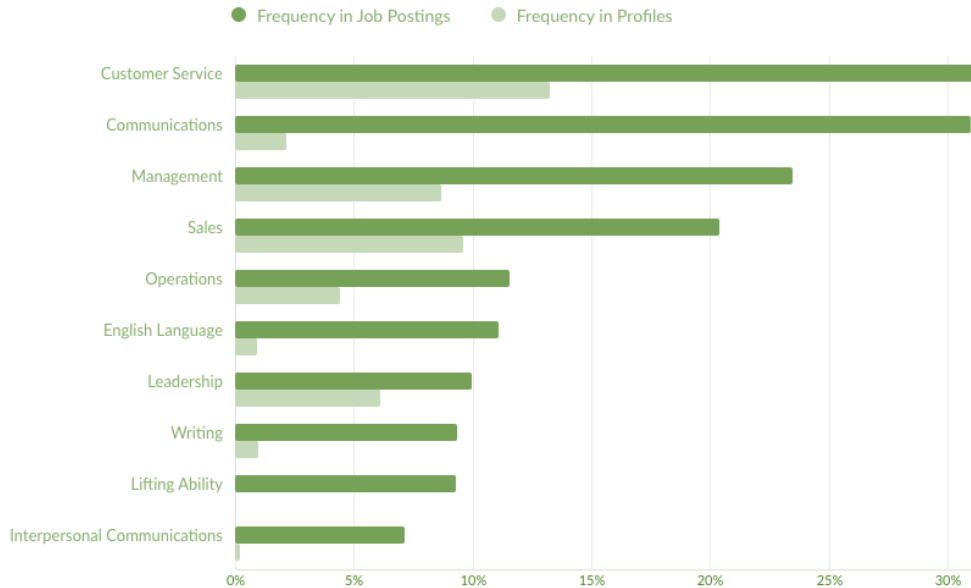


Table 4. Top Posted Occupations and Industries in Levy

Top Posted Occupations (4-digit)	Unique Posts (Jan 2018 - Dec 2022)	Top Posted Job Titles	Unique Posts	Top Industries	Unique Posts
Driver/Sales Workers and Truck Drivers	453	CDL-A Truck Drivers	101	Supermarkets and Other Grocery Retailers (except Convenience Retailers)	377
Retail Salespersons	310	Customer Service Representatives	73	Limited-Service Restaurants	279
First-Line Supervisors of Sales Workers	306	Delivery Drivers	67	Executive Offices	265
Laborers and Material Movers	246	Assistant Store Managers	65	Full-Service Restaurants	124
Customer Service Representatives	217	Retail Merchandisers	59	Employment Placement Agencies	110
Food Service Managers	189	Assistant Managers	59	General Freight Trucking,	109
Registered Nurses	166	Customer Service Associates	57	Home Health Care Services	107
Fast Food and Counter Workers	139	Correctional Officers	45	Commercial Banking	106
Designers	137	Pharmacy Technicians	44	Temporary Help Services	90
Therapists	119	Registered Nurses	40	Offices of Physicians (except Mental Health Specialists)	89

## Top Occupations Within a 60 Minute Drive Time

Top occupations (ranked by number of jobs within a 60-minute drive) for Citrus, Marion, and Levy counties were collected in this part of the regional analysis. This includes entire counties, so long as *part* of the region is within a 60-minute driving distance. It is distinct from commuting patterns as it doesn't indicate where most individuals currently travel for work, but rather shows where individuals could commute with a reasonable commute time. From Citrus, this includes Levy, Hernando, Marion, Hillsborough, Pasco, Lake, and Sumter counties. From Marion, this includes Alachua, Bradford, Flagler, Citrus, Clay, Hernando, Lake, Levy, Putnam, Sumter, and Volusia counties. From Levy this included Alachua, Citrus, Columbia, Dixie, Gilchrist, Lafayette, Marion, and Suwannee county.

Top ten industries at the 5 digit level for regions around Marion, Citrus, and Levy were highly similar, all three regions listing:

- Retail Salespersons
- Customer Service Representatives
- Stockers and Order Fillers
- Registered Nurses
- Cashiers, Office Clerks, General
- General and Operations Managers
- Fast Food and Counter Workers
- Waiters and Waitresses

Both Citrus and Marion regions listed Janitors and Cleaners, Except Maids and Housekeeping Cleaners, while regions surrounding Levy listed Postsecondary Teachers.

The 2 digit level has similarly shared top occupations, all three regions listing:

- Office and Administrative Support Occupations
- Sales and Related Occupations
- Food Preparation and Serving Related Occupations
- Transportation and Material Moving Occupations
- Business and Financial Operations Occupations
- Healthcare Practitioners and Technical Occupations
- Management Occupations
- Construction and Extraction Occupations
- Educational Instruction and Library Occupations

Both Marion and Levy regions listed 'Building and Grounds Cleaning and Maintenance Occupations, while regions surround Citrus listed Installation, Maintenance, and Repair Occupations.

## Citrus

Figure 29. Counties Within a 60 Minute Drive Time of Citrus

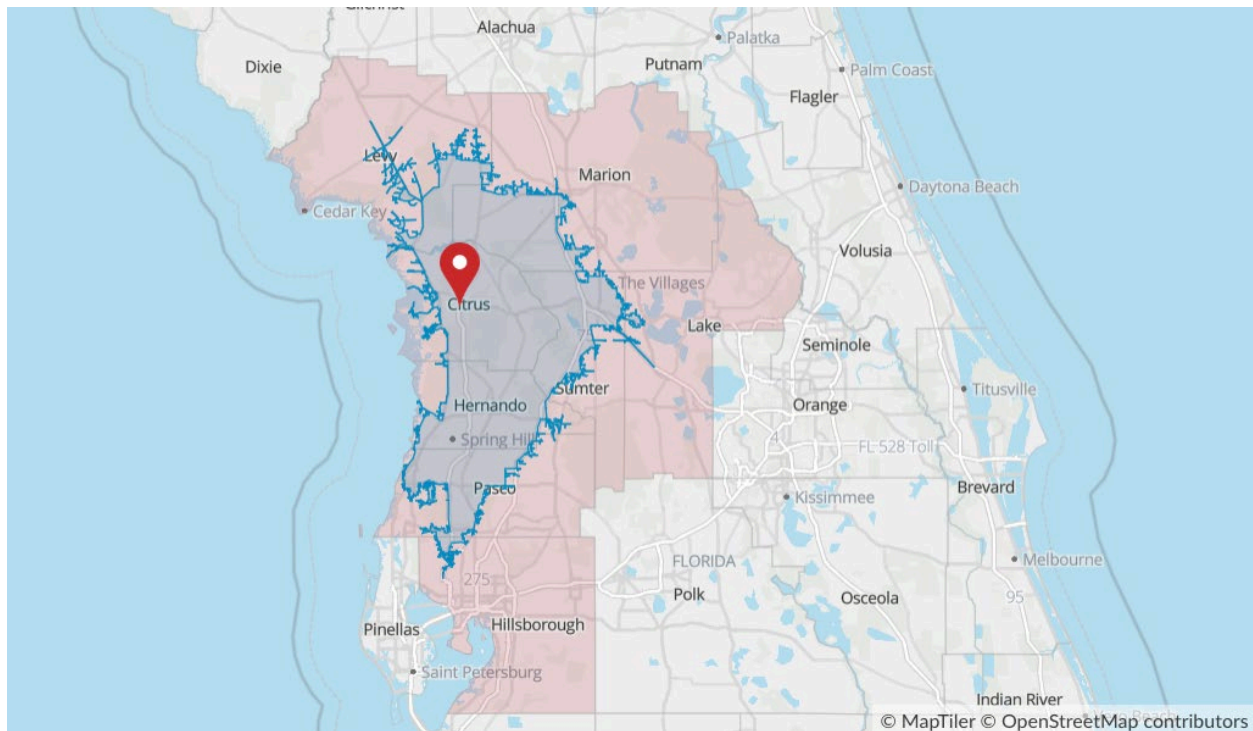


Table 5. Top 5-Digit Occupations Within 60 Minute Drive of Citrus County By Number of Jobs

Description	2023 Jobs	COL Adjusted Median Annual Earnings
Retail Salespersons	40,303	\$28,705
Customer Service Representatives	36,882	\$37,554
Stockers and Order Fillers	34,528	\$31,912
Registered Nurses	30,372	\$75,781
Cashiers	29,942	\$25,775
Office Clerks, General	27,436	\$37,866
General and Operations Managers	25,920	\$90,155
Fast Food and Counter Workers	25,218	\$24,506
Waiters and Waitresses	23,930	\$27,573
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	19,502	\$27,897

Table 6. Top 2-Digit Occupations Within 60 Minute Drive of Citrus County By Number of Jobs

Description	2023 Jobs	COL Adjusted Median Annual Earnings
Office and Administrative Support Occupations	188,545	\$39,619
Sales and Related Occupations	146,894	\$33,515
Food Preparation and Serving Related Occupations	122,381	\$28,382

Transportation and Material Moving Occupations	120,048	\$34,346
Business and Financial Operations Occupations	99,611	\$69,714
Healthcare Practitioners and Technical Occupations	94,753	\$72,317
Management Occupations	87,386	\$93,708
Construction and Extraction Occupations	78,454	\$43,281
Educational Instruction and Library Occupations	60,958	\$53,748
Installation, Maintenance, and Repair Occupations	59,102	\$45,558

## Marion

Figure 30. Counties Within a 60 Minute Drive Time of Marion

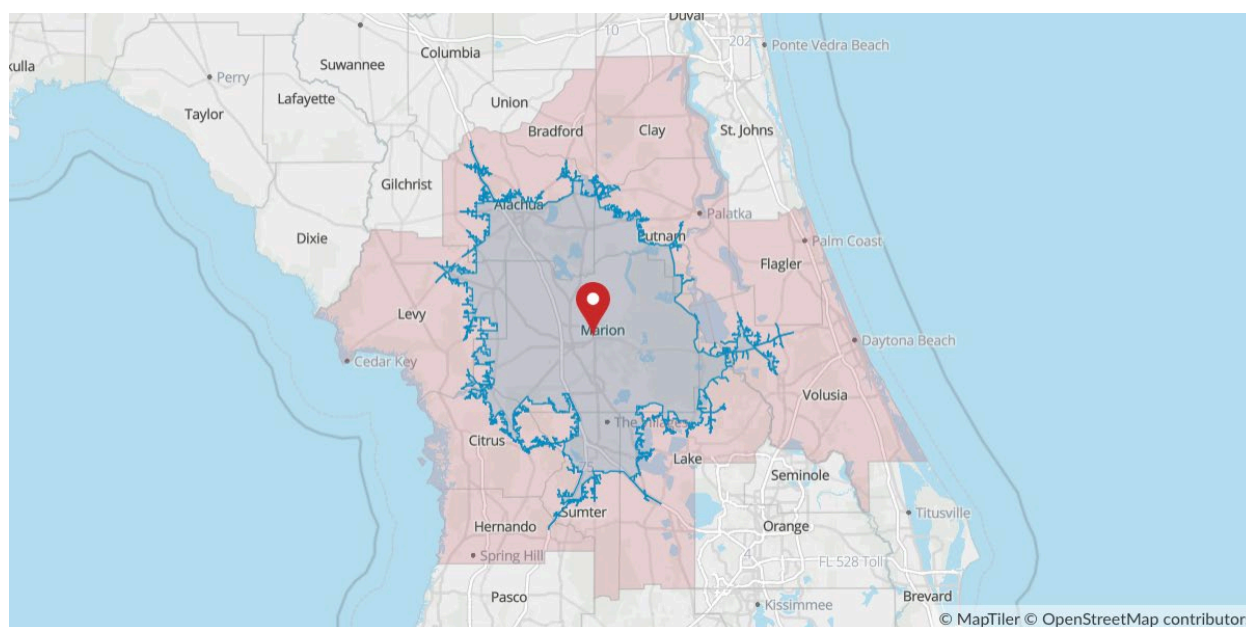


Table 7. Top 5-Digit Occupations Within 60 Minute Drive of Marion County By Number of Jobs

Description	2023 Jobs	COL Adjusted Median Annual Earnings
Retail Salespersons	28,921	\$27,767
Stockers and Order Fillers	23,601	\$31,915
Cashiers	22,791	\$25,331
Registered Nurses	22,790	\$71,579
Fast Food and Counter Workers	20,521	\$23,241
Waiters and Waitresses	19,090	\$26,877

Office Clerks, General	18,792	\$35,442
Customer Service Representatives	15,052	\$34,122
General and Operations Managers	14,124	\$81,095
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	13,316	\$27,548

Table 8. Top 2-Digit Occupations Within 60 Minute Drive of Marion County By Number of Jobs

Description	2023 Jobs	COL Adjusted Median Annual Earnings
Office and Administrative Support Occupations	106,859	\$36,559
Food Preparation and Serving Related Occupations	92,835	\$27,055
Sales and Related Occupations	92,020	\$29,870
Transportation and Material Moving Occupations	72,862	\$33,433
Healthcare Practitioners and Technical Occupations	66,513	\$68,185
Construction and Extraction Occupations	50,746	\$40,843
Management Occupations	50,405	\$81,637
Educational Instruction and Library Occupations	49,693	\$51,088
Business and Financial Operations Occupations	41,965	\$61,427
Building and Grounds Cleaning and Maintenance Occupations	39,777	\$28,880

## Levy

Figure 31. Counties Within a 60 Minute Drive Time of Levy

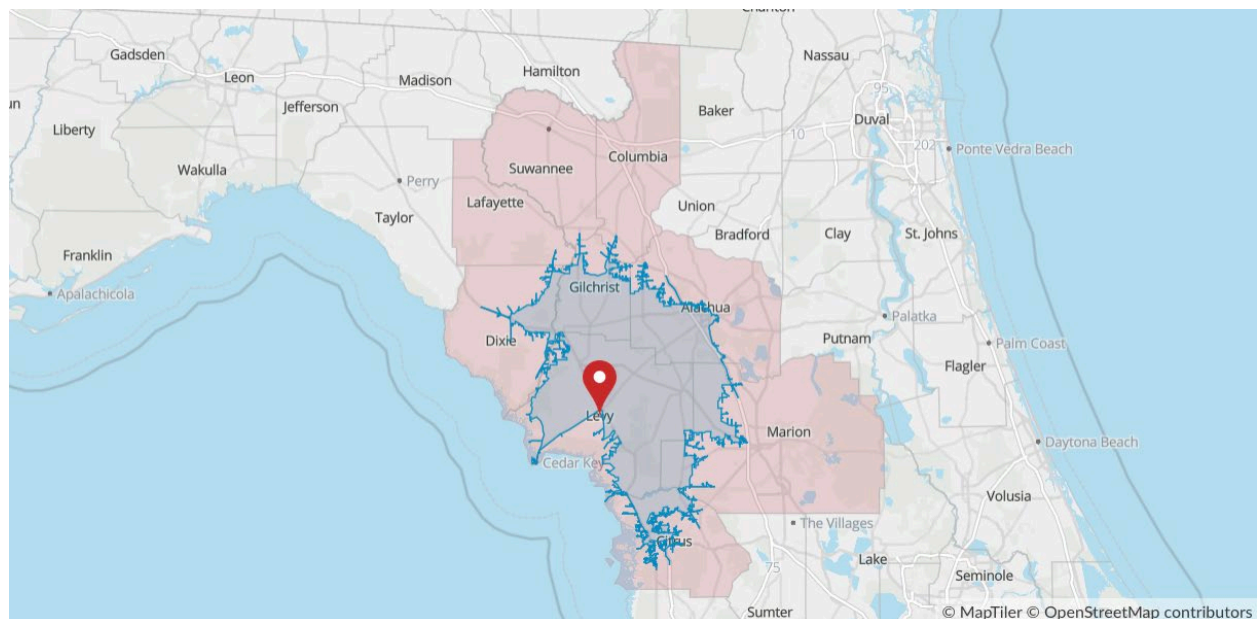


Table 9. Top 5-Digit Occupations Within 60 Minute Drive of Levy County By Number of Jobs

Description	2023 Jobs	COL Adjusted Median Annual Earnings
Retail Salespersons	11,084	\$28,782
Registered Nurses	10,670	\$74,499
Stockers and Order Fillers	9,065	\$32,168
Cashiers	8,980	\$25,840
Fast Food and Counter Workers	8,671	\$24,502
Office Clerks, General	8,079	\$36,421
Postsecondary Teachers	7,314	\$73,393
Waiters and Waitresses	6,817	\$26,848
General and Operations Managers	5,993	\$84,148
Customer Service Representatives	5,903	\$35,170

Table 10. Top 2-Digit Occupations Within 60 Minute Drive of Levy County By Number of Jobs

Description	2023 Jobs	COL Adjusted Median Annual Earnings
Office and Administrative Support Occupations	47,613	\$37,539
Sales and Related Occupations	36,504	\$30,664
Food Preparation and Serving Related Occupations	34,786	\$27,498
Transportation and Material Moving Occupations	31,913	\$34,427
Healthcare Practitioners and Technical Occupations	29,791	\$70,296
Educational Instruction and Library Occupations	24,438	\$52,497
Management Occupations	22,718	\$83,226
Construction and Extraction Occupations	18,873	\$40,789
Business and Financial Operations Occupations	18,086	\$59,879
Building and Grounds Cleaning and Maintenance Occupations	16,689	\$29,110

## Occupational Clusters and Commonalities For Related Counties of Interest

### Occupations in Common

Commute analysis and drive-time analysis produce a list of counties with ties to Citrus, Levy, and Marion that overlap a great deal – though not entirely. While fairly comprehensive, it is also worthwhile to include a few additional regions that share common ground with Citrus, Levy, and Marion based on other metrics. Citrus, Levy, and Marion are connected to Dixie, Gilchrist, Suwanee, Lafayette, and Columbia through drive time and commute patterns, and also share limitations in terms of internet service. Creating Connections targeted many of these areas for fiber optic internet service, along with Union, Hamilton, Taylor, Madison, and



Jefferson, which will also be included in the following analysis. Many of these counties (Madison, Hamilton, Taylor, Bradford, Columbia, etc.) are also North Central Florida Opportunity Zones, including Levy, and are considered to be rural areas of opportunity (catalyst sites). There are also a number of shared occupational drivers as shown in the following analysis.

In total, 29 counties were included and the top 20 occupations<sup>7</sup> from each collected for a total of 580 data points. Of those, only 42 occupations were unique among them, meaning large overlap in every listed occupation but 6. Top common occupations include retail sales workers, material moving workers, food and beverage serving workers, management occupations, installation, maintenance, and repair occupations, cooks and food preparation workers, healthcare diagnosing or treating practitioners, top executives, and health technologists and technicians. Figure 32 shows occupations that are also top ten occupations in Citrus county in blue. Figures 33 and 34 do the same for Marion and Levy county respectively in orange and green. All three show a great deal of overlap, with Levy differing from the other two the most (figure 34).

<sup>7</sup> Data Source: Lightcast 2023, based on number of jobs provided between 2018 and 2023 at the 3-digit SOC level

Figure 32. Overlapping Top Occupations In Counties of Interest With Citrus Top Occupations

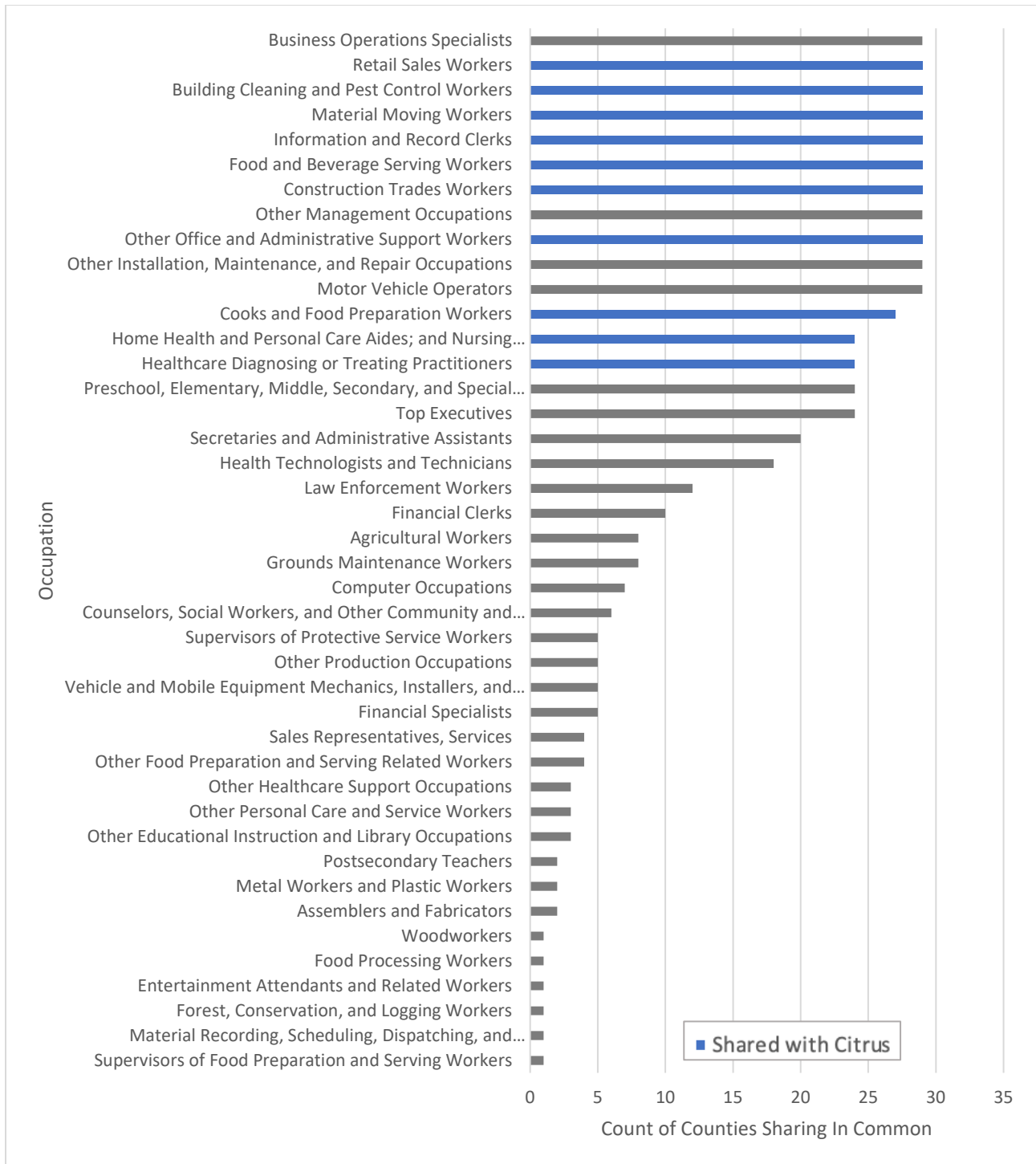


Figure 33. Overlapping Top Occupations In Counties of Interest With Marion Top Occupations

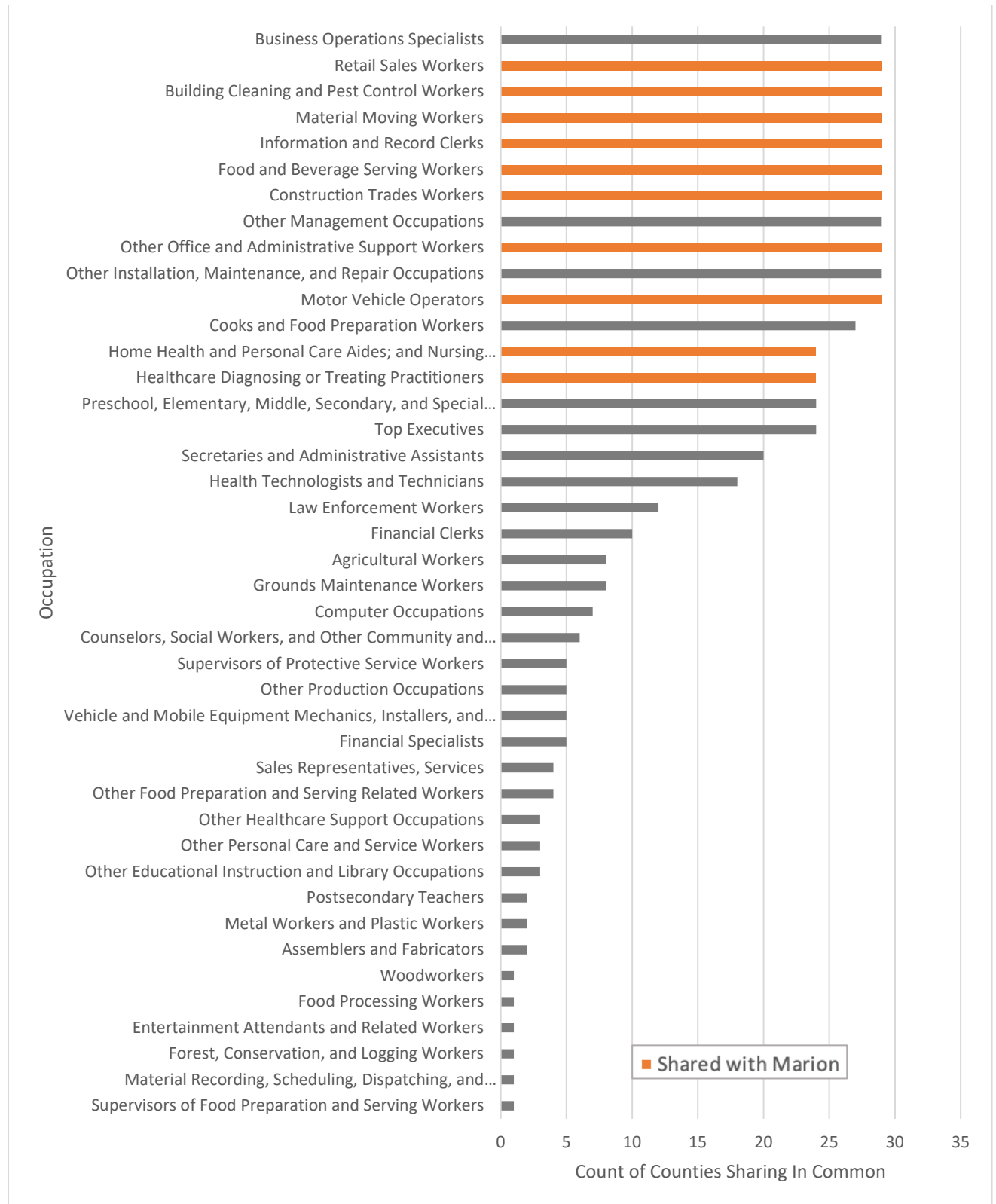
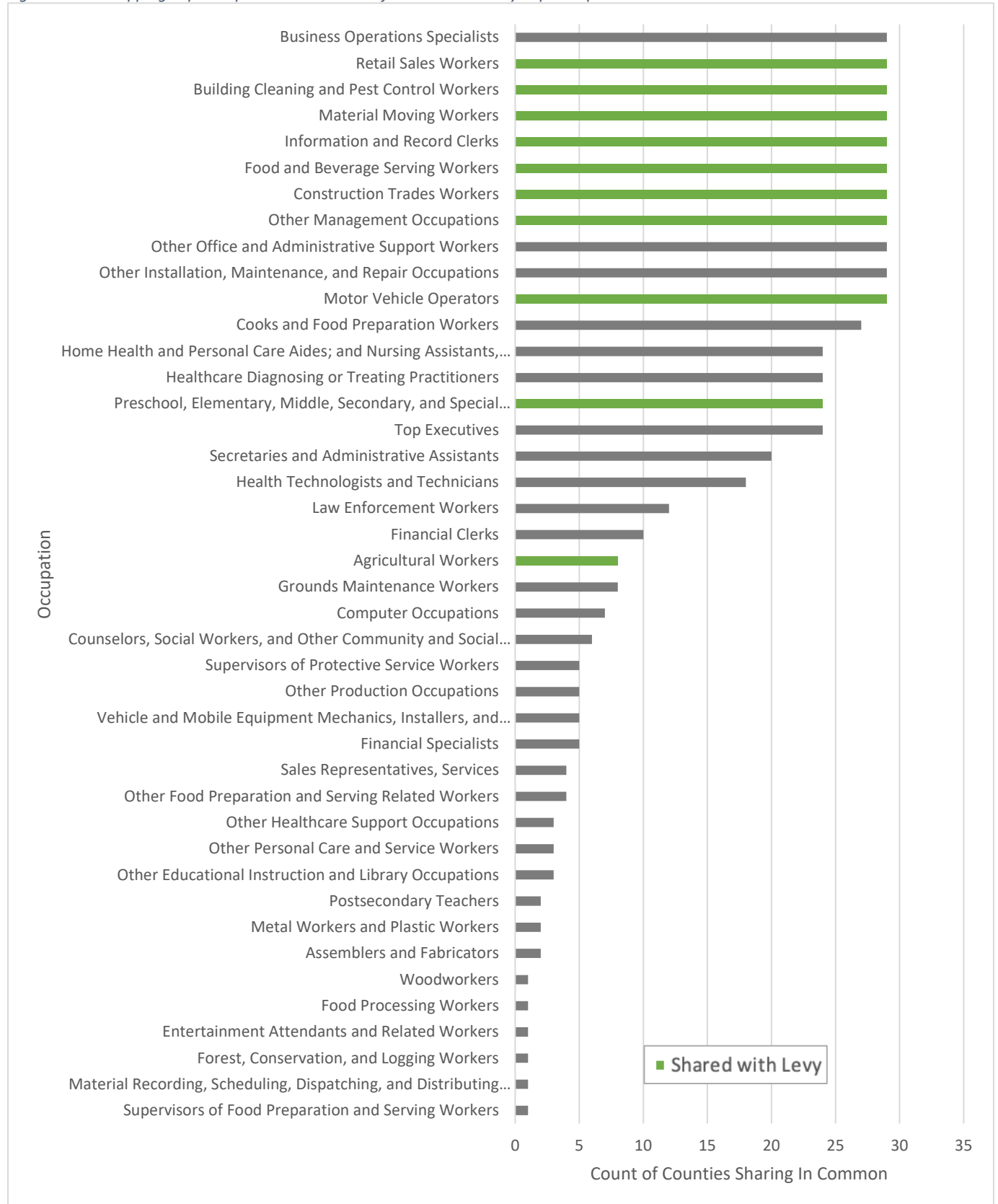


Figure 34. Overlapping Top Occupations In Counties of Interest With Levy Top Occupations

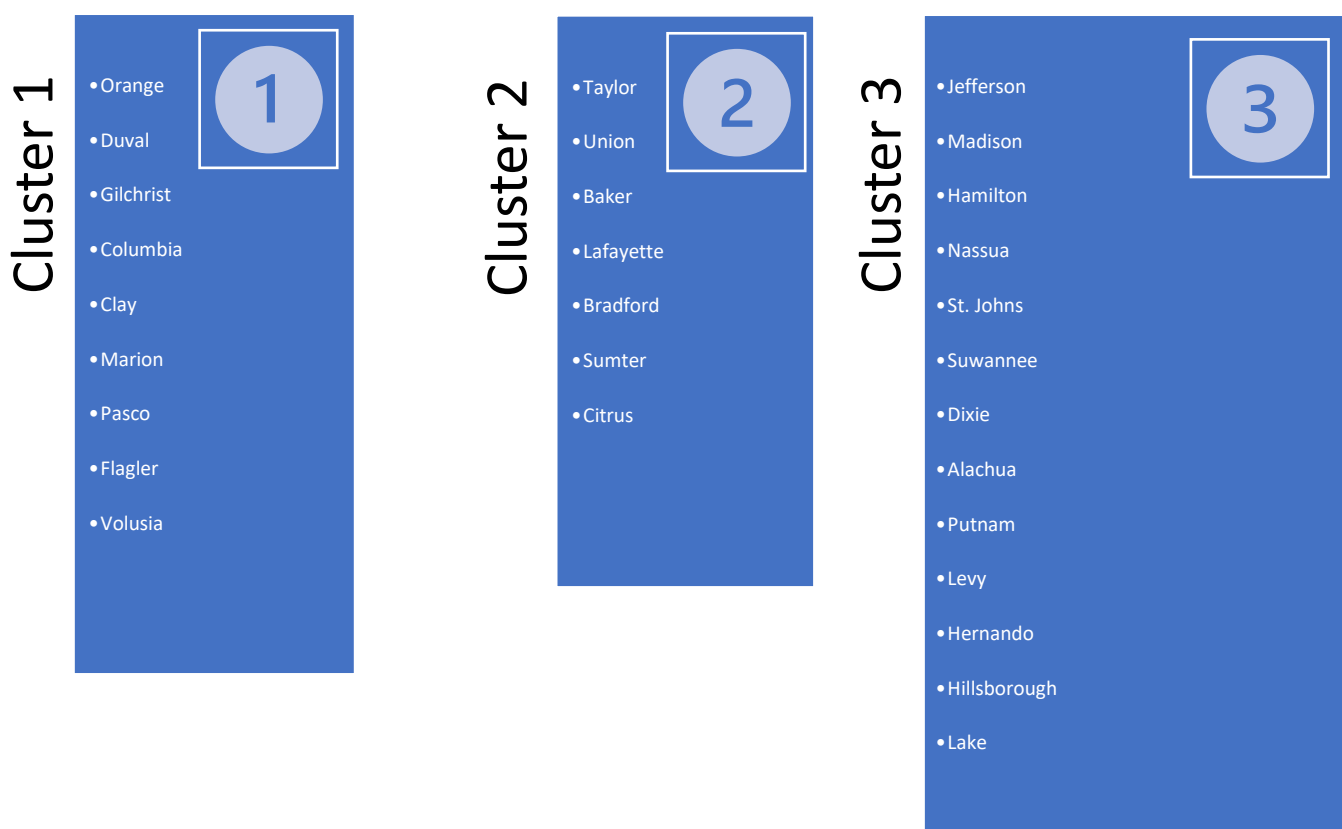


## Kmode Analysis

Using Kmode clustering in python, three groupings of relevant counties were determined (figure 35). Kmode is very similar to Kmeans clustering (a common unsupervised learning algorithm that works by grouping items based on distance from each other) except it works on categories of data (in this case, categories of occupations). Kmode clustering<sup>8</sup> works by identifying the modes or most frequent values within each cluster. Here, it is examining the ranked occupations for all counties of interest based on similarity of ranking, not amount of overlap. Perhaps these counties do not share the most occupations in common, but the occupations they do share are of similar importance.

It's important to consider the simplicity of this clustering model and highlight all that it does not include. There are many social, historical, and economic factors that can have enormous impact on how regions relate to one another that are missing from this calculation -- which is why it should be used as a method that provides insight rather than taken as explicit truth or the sole correct answer for how one might group counties.

Figure 35. Kmode Clustering Results



<sup>8</sup> For more on how Kmodes functions: <https://www.analyticsvidhya.com/blog/2021/06/kmodes-clustering-algorithm-for-categorical-data/#89b0>

## Heatmaps

Finally, a cross comparison of top occupations across counties can be seen in figure 36, and specifically narrowed down to comparisons with Citrus, Levy, and Marion in figure 37. This comparison shows how many of each county's top 20 occupations<sup>9</sup> are shared for each related county.

Levy has comparatively low overlap but shares the greatest number of top occupations with Taylor and Bradford counties. Marion has significant overlap with many counties, particularly Clay, Putnam, Columbia, Hernando, Pasco, Lake, Citrus, Flagler, and Volusia. Citrus similarly has a great deal of overlap, mostly seen in Nassau, Clay, Marion, Lake, Flagler, and Volusia.

<sup>9</sup> Data Source: Lightcast 2023, based on number of jobs provided between 2018 and 2023 at the 3-digit SOC level

Figure 36. Cross Comparison of Top Occupations By County

	Orange	Jefferson	Madison	Taylor	Hamilton	Union	Duval	Nassua	Baker	St. Johns	Suwannee	Lafayette	Dixie	Gilchrist	Columbia	Bradford	Alachua	Putnam	Clay	Levy	Hernando	Marion	Hillsborough	Pasco	Lake	Sumter	Citrus	Flagler	Volusia
Orange		16	14	14	13	14	19	15	15	17	13	13	13	14	16	13	16	16	17	13	17	16	19	17	16	16	15	16	16
Jefferson	16		15	15	16	15	16	17	15	17	15	14	15	17	16	14	15	16	16	14	16	16	16	16	18	17	16	17	16
Madison	14	15		17	16	15	14	15	16	15	17	17	15	17	17	15	17	17	16	15	16	16	14	16	17	16	16	16	16
Taylor	14	15	17		16	16	15	16	15	16	17	16	16	17	18	17	15	18	16	17	16	16	15	16	16	16	15	17	17
Hamilton	13	16	16	16		15	13	15	13	14	17	15	17	17	15	16	13	15	14	16	14	14	13	14	16	15	14	15	14
Union	14	15	15	16	15		14	16	17	16	16	17	16	17	17	17	16	16	16	14	16	16	14	16	16	16	15	16	16
Duval	19	16	14	15	13	14		15	15	17	13	14	13	14	17	14	16	17	17	14	17	16	20	17	16	16	15	17	17
Nassua	15	17	15	16	15	16	15		16	18	15	14	16	16	17	15	16	17	17	14	17	17	15	17	18	17	18	18	18
Baker	15	15	16	15	13	17	15	16		16	15	16	14	16	17	15	18	17	17	13	17	17	15	17	17	16	17	17	17
St. Johns	17	17	15	16	14	16	17	18	16		15	14	15	16	17	15	17	17	17	14	18	17	17	18	17	16	17	17	18
Suwannee	13	15	17	17	17	16	13	15	15	15		15	16	18	16	17	15	16	15	16	15	15	13	15	16	15	14	15	15
Lafayette	13	14	17	16	15	17	14	14	16	14	15		15	16	17	16	15	16	15	15	15	15	14	15	16	15	15	16	16
Dixie	13	15	15	16	17	16	13	16	14	15	16	15		16	16	17	14	15	15	15	15	15	13	15	16	16	15	16	15
Gilchrist	14	17	17	17	17	17	14	16	16	16	18	16	16		17	17	16	16	16	16	16	16	14	16	17	16	15	16	16
Columbia	16	16	17	18	15	17	17	17	17	17	16	17	16	17		17	17	19	18	16	18	18	17	18	18	18	17	19	19
Bradford	13	14	15	17	16	17	14	15	15	15	17	16	17	17	17		15	16	16	17	15	16	14	15	15	15	15	16	16
Alachua	16	15	17	15	13	16	16	16	18	17	15	15	14	16	17	15		17	17	13	18	17	16	18	17	16	17	17	17
Putnam	16	16	17	18	15	16	17	17	17	17	16	16	15	16	19	16	17		18	15	18	18	17	18	18	17	17	19	19
Clay	17	16	16	16	14	16	17	17	17	17	15	15	15	16	18	16	17	18		15	18	19	17	18	18	17	18	18	18
Levy	13	14	15	17	16	14	14	14	13	14	16	15	15	16	16	17	13	15	15		14	16	14	14	15	14	14	15	15
Hernando	17	16	16	16	14	16	17	17	17	18	15	15	15	16	18	15	18	18	18	14		18	17	20	18	18	17	18	18
Marion	16	16	16	16	14	16	16	17	17	17	15	15	15	16	18	16	17	18	19	16	18		16	18	18	17	18	18	18
Hillsborough	19	16	14	15	13	14	20	15	15	17	13	14	13	14	17	14	16	17	17	14	17	16		17	16	16	15	17	17
Pasco	17	16	16	16	14	16	17	17	17	18	15	15	15	16	18	15	18	18	18	14	20	18	17		18	18	17	18	18
Lake	16	18	17	16	16	16	16	18	17	17	16	16	16	17	18	15	17	18	18	15	18	18	16	18		18	18	19	18
Sumter	16	17	16	16	15	16	16	17	16	16	15	15	16	16	18	15	16	17	17	14	18	17	16	18	18		17	18	17
Citrus	15	16	16	15	14	15	15	18	17	17	14	15	15	15	17	15	17	17	18	14	17	18	15	17	18	17		18	18
Flagler	16	17	16	17	15	16	17	18	17	17	15	16	16	16	19	16	17	19	18	15	18	18	17	18	19	18	18		19
Volusia	16	16	16	17	14	16	17	18	17	18	15	16	15	16	19	16	17	19	18	15	18	18	17	18	18	17	18	19	

Figure 37. Cross Comparison of Top Occupations By County For Citrus, Marion, Levy

	Orange	Jefferson	Madison	Taylor	Hamilton	Union	Duval	Nassua	Baker	St. Johns	Suwannee	Lafayette	Dixie	Gilchrist	Columbia	Bradford	Alachua	Putnam	Clay	Levy	Hernando	Marion	Hillsborough	Pasco	Lake	Sumter	Citrus	Flagler	Volusia
Levy	13	14	15	17	16	14	14	14	13	14	16	15	15	16	16	17	13	15	15	20	14	16	14	14	15	14	14	15	15
Marion	16	16	16	16	14	16	16	17	17	17	15	15	15	16	18	16	17	18	19	16	18	20	16	18	18	17	18	18	18
Citrus	15	16	16	15	14	15	15	18	17	17	14	15	15	15	17	15	17	17	18	14	17	18	15	17	18	17	20	18	18

## Industry Analysis and Industry Clusters<sup>10</sup>

A similar cross comparison of top 10 industries<sup>11</sup> across all relevant regions can be seen in Figure 38 and 39, with top industries shared across counties shown in figure 40. Of those commonly shared across multiple counties as a top job providing industry, all but hotels, landscaping, and nursing care facilities were present in one or all of Citrus, Marion, and Levy.

Figure 38. Cross Comparison of Top Industry By County

	Citrus	Levy	Marion	Orange	Jefferson	Madison	Taylor	Hamilton	Union	Duval	Nassau	Baker	St. Johns	Suwannee	Lafayette	Dixie	Gilchrist	Columbi	Bradford	Alachua	Putnam	Clay	Hernando	Hillsborough	Pasco Lake	Sumter	Flagler	Volusia	
Citrus		7	10	6	5	5	5	4	6	5	6	7	6	6	4	6	5	7	7	7	7	8	8	7	8	8	7	7	8
Levy	7		7	4	6	5	5	4	5	3	5	6	5	7	5	6	6	5	7	5	6	6	6	5	6	6	6	6	6
Marion	10	7		6	5	5	5	4	6	5	6	7	6	6	4	6	5	7	7	7	7	8	8	7	8	8	7	7	8
Orange	6	4	6		3	5	4	4	4	6	6	5	6	4	2	4	4	6	4	6	5	6	6	7	6	6	5	6	6
Jefferson	5	6	5	3		5	4	4	5	3	4	4	5	6	6	6	8	4	5	4	5	4	4	4	4	4	4	4	4
Madison	5	5	5	5	5		4	4	5	4	4	5	3	5	5	5	6	5	4	4	5	4	4	5	4	4	3	4	4
Taylor	5	5	5	4	4	4		5	4	3	4	5	4	6	3	6	5	5	5	5	4	5	4	4	4	4	4	4	4
Hamilton	4	4	4	4	4	4	5		4	2	4	4	4	5	3	4	4	4	4	3	4	3	3	3	3	3	3	4	3
Union	6	5	6	4	5	5	4	4		3	5	5	5	5	4	5	5	5	5	5	4	5	5	5	6	6	4	5	5
Duval	5	3	5	6	3	4	3	2	3		4	5	4	3	2	3	3	6	3	7	4	5	6	8	5	5	5	4	5
Nassau	6	5	6	6	4	4	4	4	5	4		5	7	5	4	5	4	5	6	6	4	7	6	6	6	7	5	9	7
Baker	7	6	7	5	4	5	5	4	5	5	5		4	5	3	5	5	6	6	6	6	6	7	5	6	6	5	6	6
St. Johns	6	5	6	6	5	3	4	4	5	4	7	4		5	3	5	5	5	5	6	5	7	6	6	6	7	6	7	8
Suwannee	6	7	6	4	6	5	6	5	5	3	5	5	5		5	6	6	5	6	5	5	5	5	5	5	5	5	5	5
Lafayette	4	5	4	2	6	5	3	3	4	2	4	3	3	5		5	6	3	6	3	4	3	3	4	3	3	3	4	3
Dixie	6	6	6	4	6	5	6	4	5	3	5	5	5	6	5		6	5	6	5	6	5	5	5	5	5	5	5	5
Gilchrist	5	6	5	4	8	6	5	4	5	3	4	5	5	6	6	6		5	5	4	6	4	4	4	4	4	4	4	4
Columbia	7	5	7	6	4	5	5	4	5	6	5	6	5	5	3	5	5		5	7	6	6	6	7	6	6	6	5	6
Bradford	7	7	7	4	5	4	5	4	5	3	6	6	5	6	6	6	5	5		5	6	6	6	5	7	6	6	7	6
Alachua	7	5	7	6	4	4	4	3	5	7	6	6	6	5	3	5	4	7	5		6	7	8	8	7	7	7	6	7
Putnam	7	6	7	5	5	5	5	4	4	4	4	6	5	5	4	6	6	6	6	6		6	6	5	6	6	6	5	6
Clay	8	6	8	6	4	4	4	3	5	5	7	6	7	5	3	5	4	6	6	7	6		8	7	8	9	7	8	9
Hernando	8	6	8	6	4	4	4	3	5	6	6	7	6	5	3	5	4	6	6	8	6	8		7	8	8	7	7	8
Hillsborough	7	5	7	7	4	5	4	3	5	8	6	5	6	5	4	5	4	7	5	8	5	7	7		7	7	7	6	7
Pasco	8	6	8	6	4	4	4	3	6	5	6	6	6	5	3	5	4	6	7	7	6	8	8	7		9	7	7	8
Lake	8	6	8	6	4	4	4	3	6	5	7	6	7	5	3	5	4	6	6	7	6	9	8	7	9		7	8	9
Sumter	7	6	7	5	4	3	4	3	4	5	5	5	6	5	3	5	4	6	6	7	6	7	7	7	7		6	7	
Flagler	7	6	7	6	4	4	4	4	5	4	9	6	7	5	4	5	4	5	7	6	5	8	7	6	7	8	6	6	8
Volusia	8	6	8	6	4	4	4	3	5	5	7	6	8	5	3	5	4	6	6	7	6	9	8	7	8	9	7	8	

Figure 39. Cross Comparison of Top Industry By County For Citrus, Marion, Levy

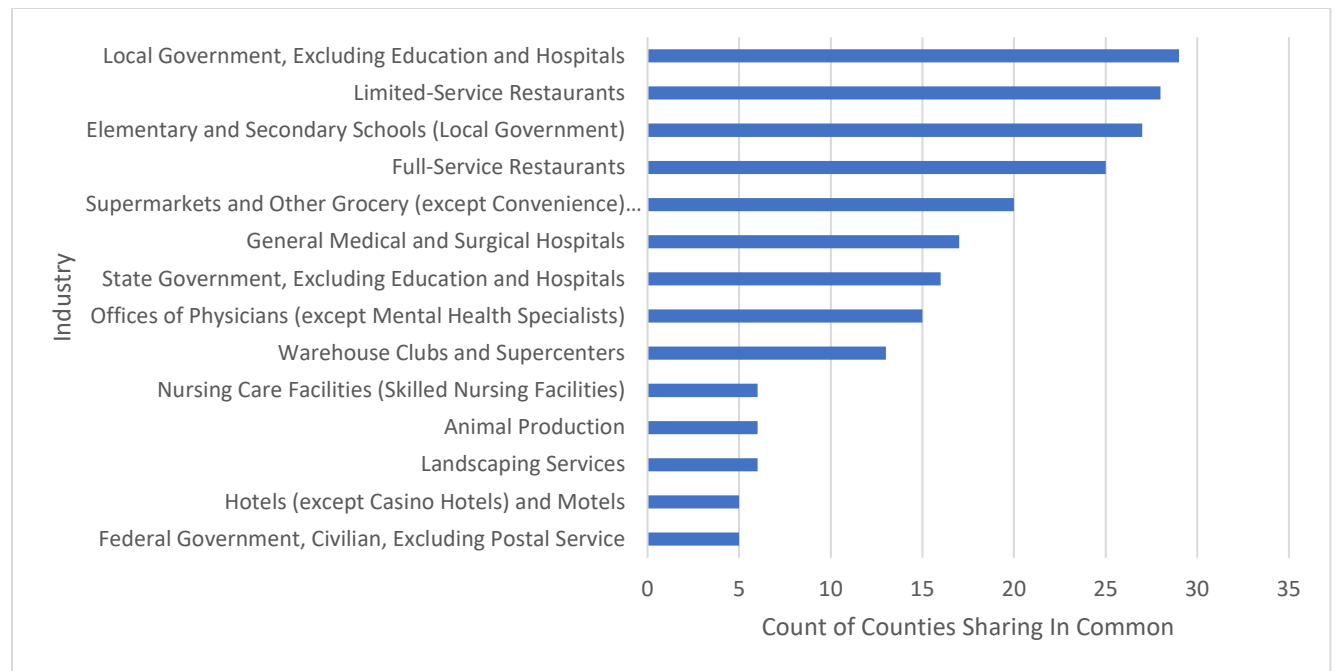
	Citrus	Levy	Marion	Orange	Jefferson	Madison	Taylor	Hamilton	Union	Duval	Nassau	Baker	St. Johns	Suwannee	Lafayette	Dixie	Gilchrist	Columbia	Bradford	Alachua	Putnam	Clay	Hernando	Hillsborough	Pasco	Lake	Sumter	Flagler	Volusia
Citrus		7	10	6	5	5	5	4	6	5	6	7	6	6	4	6	5	7	7	7	7	8	8	7	8	8	7	7	8
Levy	7		7	4	6	5	5	4	5	3	5	6	5	7	5	6	6	5	7	5	6	6	6	5	6	6	6	6	6
Marion	10	7		6	5	5	5	4	6	5	6	7	6	6	4	6	5	7	7	7	7	8	8	7	8	8	7	7	8

<sup>10</sup> Professor Michael Porter's U.S. Cluster Mapping Project (Harvard): <https://www.clustermapping.us/>  
<https://www.clustermapping.us/sites/default/files/files/page/Traded%20Clusters%20Appendix.pdf>  
<https://www.clustermapping.us/sites/default/files/files/page/Local%20Clusters%20Appendix.pdf>

<sup>11</sup> Source: Lightcast 2023, ranked based on number of jobs produced in 2023



Figure 40. Top Industries In Common Across Regions of Interest



Industries with a current foothold in the area can be expanded into other fields with enough overlap in skills, technology, and other capabilities. In order to address which industries might be most related to these highly relevant fields, cluster mapping categories from the U.S. Cluster Mapping Project were used. Local clusters were examined, meaning industries that sell products and services primarily for the local market, as well as traded clusters (concentrated in a subset of geographic areas and sell to other regions and nations) and results can be seen in Figures 41 through 48.

Overarching industry clusters are focused on areas of local education/training, hospitality, health services, local retail, agriculture, and household goods and services. Both hospitality and agriculture are traded clusters, and local and state government are not industry categories examined in Michael Porter's clustering web.

Figure 41. Related Industry Web For Elementary and Secondary Schools

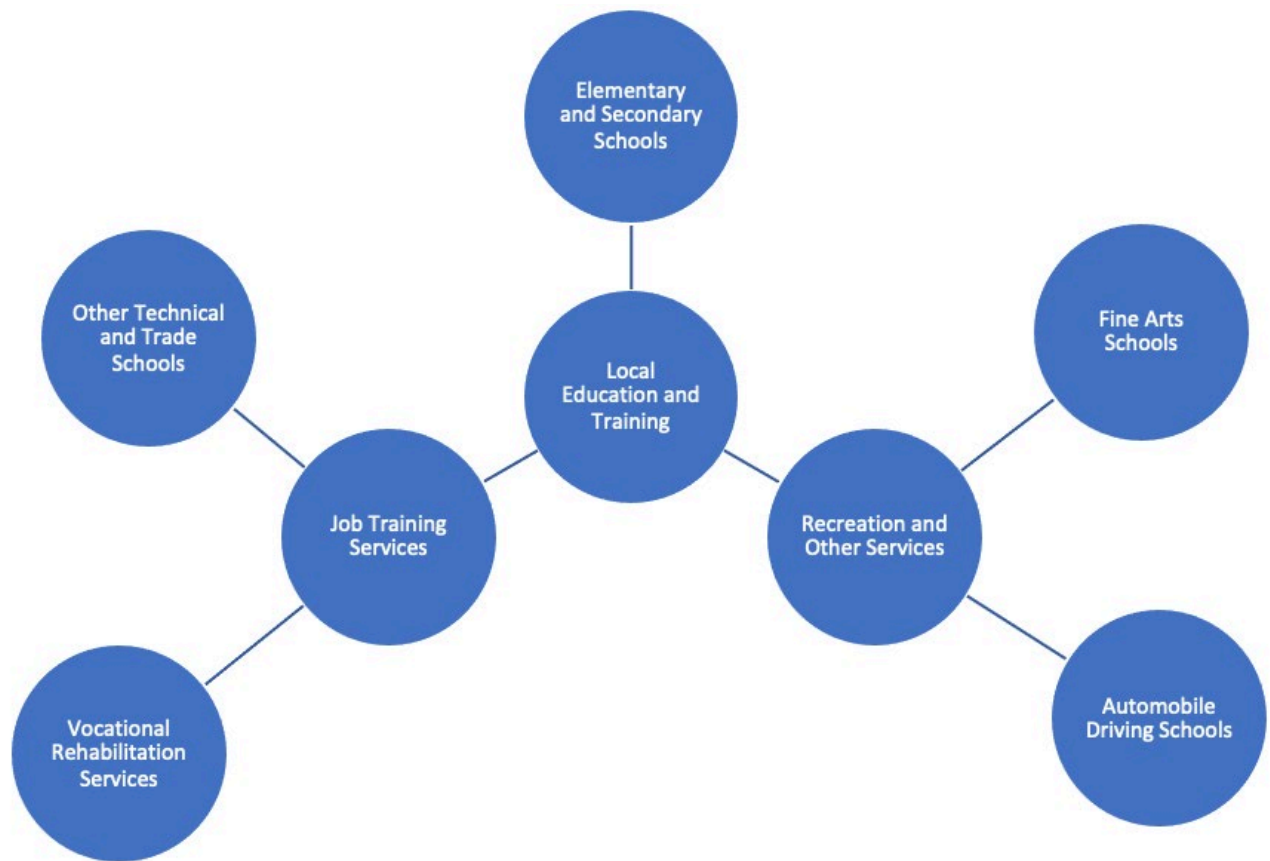


Figure 42. Related Industry Web For Full-Service Restaurants and Limited-Service Restaurants

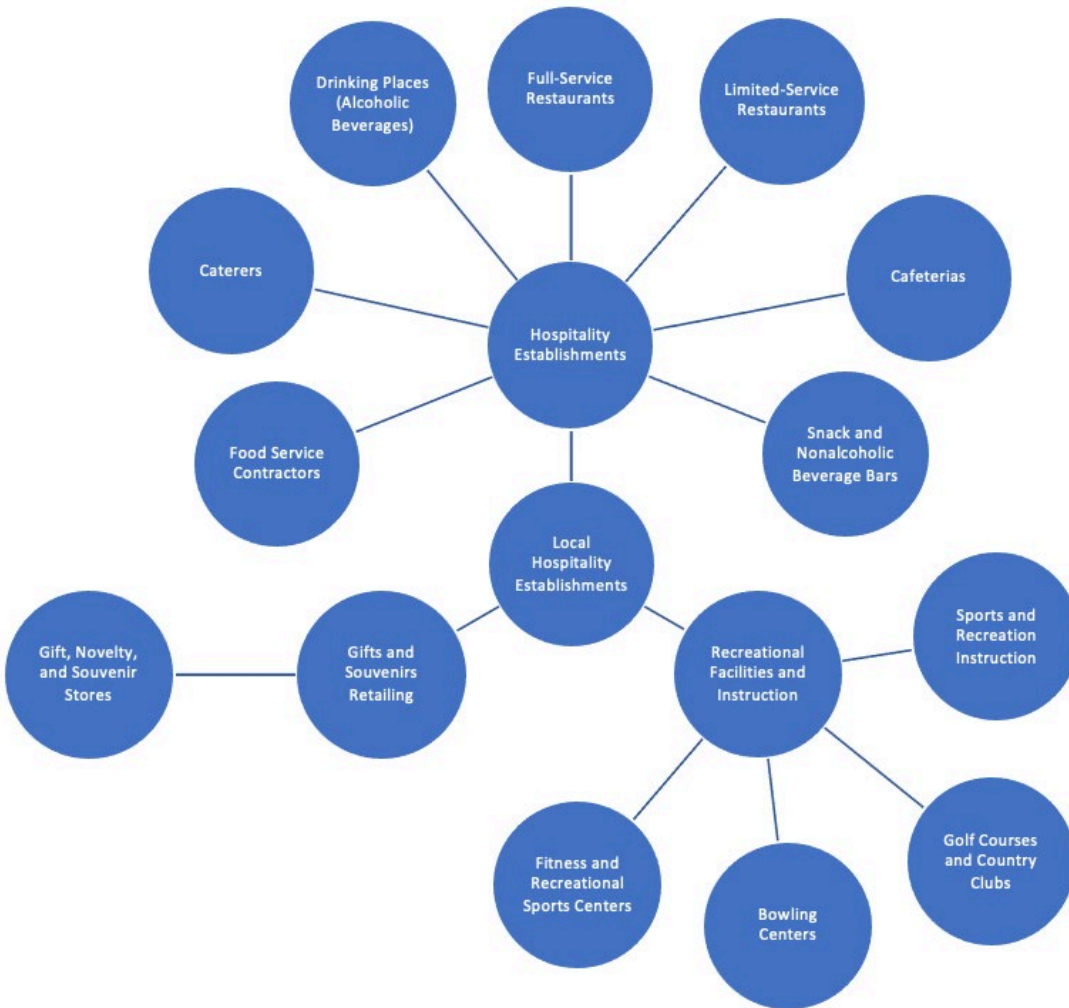


Figure 43. Related Industry Web For Supermarkets and Other Grocery (except Convenience) Stores



Food wholesaling in figure 43 above includes the following subcategories: general line grocery, packaged frozen food, dairy product (except dried or canned), confectionary, and other grocery and related products merchant wholesalers. Retail food stores includes supermarkets and other grocery (except convenience) stores, convenience stores, meat markets, fish and seafood markets, fruit and vegetable markets, baked goods stores, confectionery and nut stores, all other specialty food stores, and food (health) supplement stores. Vending and direct selling includes both vending machine operators and direct selling establishments along with mobile food services.

*Figure 44. Related Industry Web For Nursing Care Facilities, General Medical and Surgical Hospitals, and Offices of Physicians (except Mental Health Specialists)*



Healthcare provider offices in figure 44 above includes the following sub-industries: offices of dentists, chiropractors, optometrists, mental health practitioners (except physicians), physical, occupational and speech therapists, and audiologists, podiatrists, all other miscellaneous health practitioners, family planning centers, outpatient mental health and substance abuse centers, HMO medical centers, kidney dialysis centers, freestanding ambulatory surgical and emergency centers, all other outpatient care centers, blood and organ banks, and all other miscellaneous ambulatory health care services.

Hospitals includes general medical and surgical hospitals, psychiatric and substance abuse hospitals, and specialty (except psychiatric and substance abuse) hospitals. Medical Laboratories includes Dental Laboratories, Medical Laboratories, and Diagnostic Imaging Centers. Home and residential care includes home health care services, nursing care facilities, residential mental retardation facilities, residential mental health and substance abuse facilities, continuing care retirement communities, homes for the elderly, and other residential care facilities.

Figure 45. Related Industry Web For Warehouse Clubs and Supercenters



Figure 46. Related Industry Web For Support Activities for Animal Production

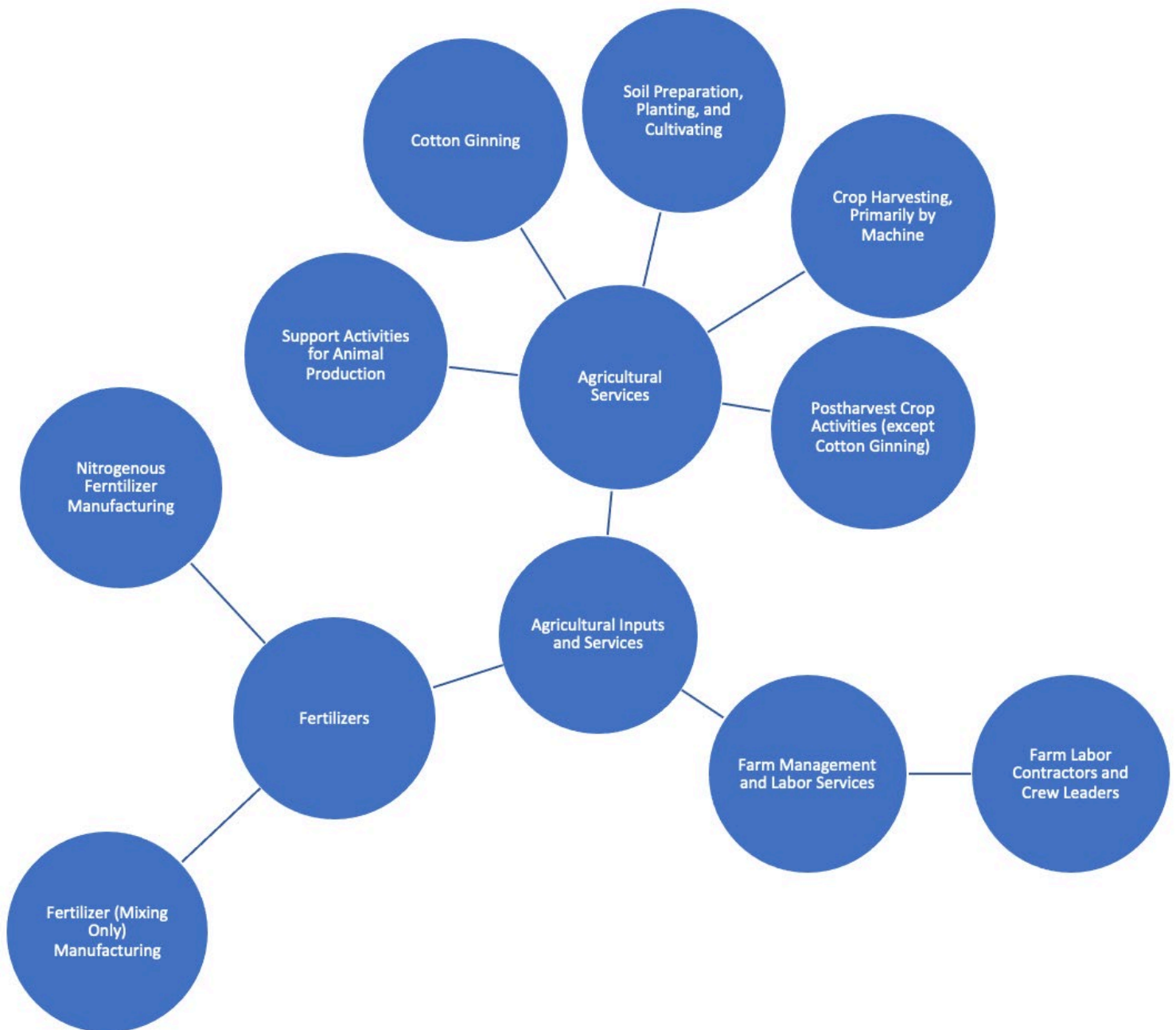


Figure 47. Related Industry Web For Landscaping Services

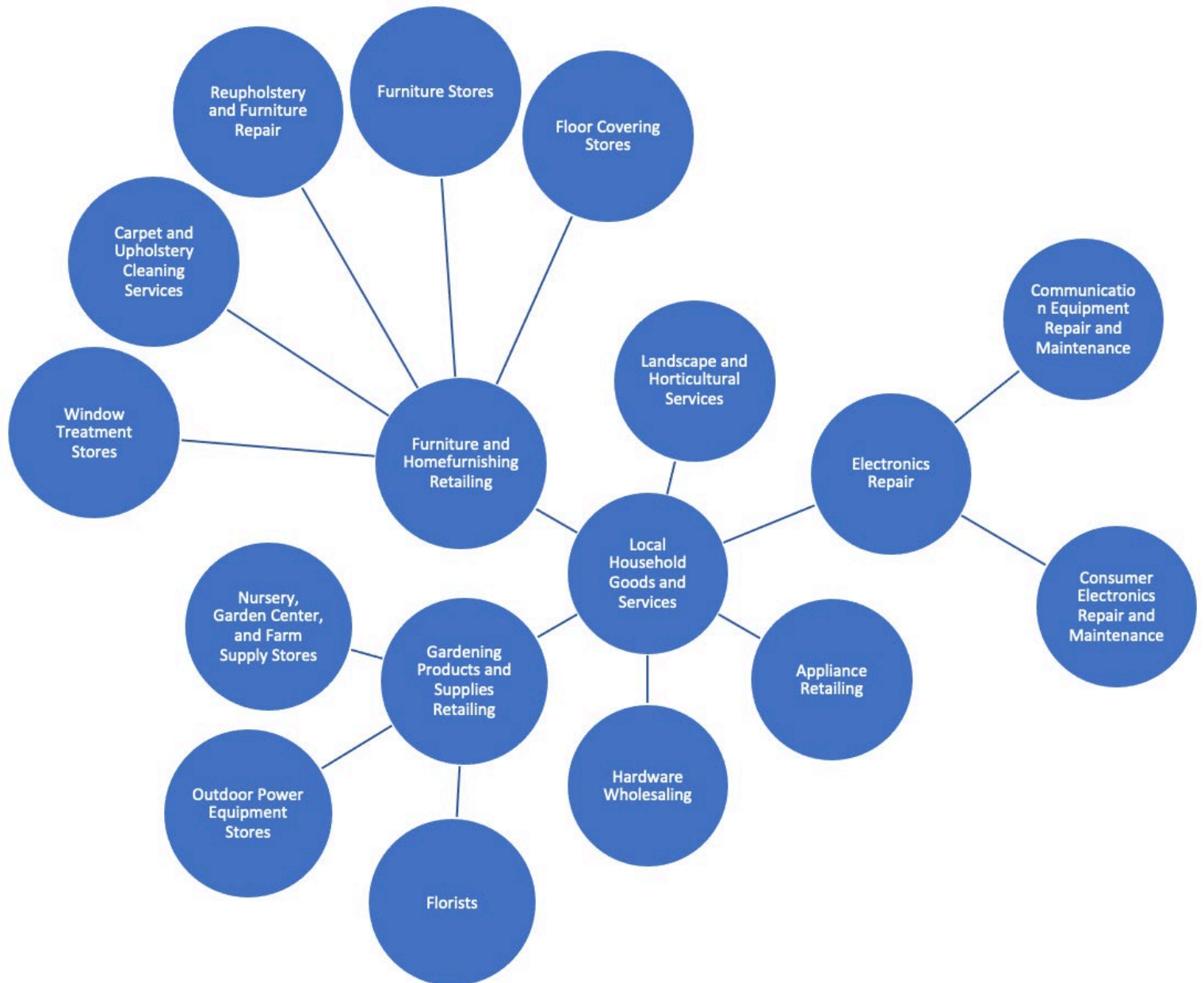




Figure 6. Related Industry Web For Hotels



Spectator sports in figure 48 includes the following sub-industries: sports teams and clubs, racetracks, and other spectator sports. Amusement parks and arcades includes arcades, and gambling facilities includes casinos (except casino hotels). Cultural and educational entertainment includes the following sub-industries: art dealers, museums, historical sites, zoos and botanical gardens, nature parks and other similar institutions. Other tourism attractions include the following sub-industries: hunting and trapping, skiing facilities, marinas, and recreational and vacation camps (except campgrounds). Accommodations and related services include the following sub-industries: convention and visitors bureaus, hotels (except casino hotels) and motels, casino hotels, bed-and-breakfast inns, all other traveler accommodation, RV (recreational vehicle) parks and campgrounds, and rooming and boarding houses. Lastly, tourism related services include the following sub-industries: scenic and sightseeing transportation, land, scenic and sightseeing transportation, water, scenic and sightseeing transportation, other, recreational goods rental, travel agencies, tour operators, all other travel arrangement and reservation services.



## Regional Recommendations

Regions 9, 7, and 6 may be of particular interest in relation to region 10 (Citrus, Levy, and Marion). These areas have either a commute/geospatial relationship to region 10, common industry and occupational drivers, or common social components. Some share aspects of all three.

### Region 9: Alachua and Bradford Counties

Alachua is not only a top inflow and outflow county for both Marion and Levy but also shares 17 out of 20 top occupations with Marion and Citrus (see heatmaps), and 7 out of 10 top industries. General medical and surgical hospitals, and offices of physicians are important industries for Citrus, Marion, and Alachua counties. Healthcare related jobs are a source of high pay and growth in the job market broadly for Marion and Citrus, making this an important commonality.

Bradford county shares a large number of top occupations with Levy (17 out of 20), and is one of the more compatible counties for Levy based on occupations. Levy, Citrus, and Marion all share industries in common, with 7 out of 10 top industries shared. In particular, elementary and secondary schools are an important industry for Bradford, Alachua, Marion, Levy, and Citrus, as well as local and state government, full and limited-service restaurants, supermarkets, and warehouse clubs, and supercenters. Alachua and Bradford also both fall within an hour drive time limit for parts of Marion county, and both Levy and Bradford are considered rural areas of opportunity.

### Region 7: Gilchrist, Union, Columbia, and Dixie

Levy is connected to Dixie, Gilchrist, and Columbia through drive time, and was targeted along with Citrus, Marion, and Union by the Creating Connections fiber optic internet service program as all share similar limitations in the region. Both Levy and Columbia are considered rural areas of opportunity/catalyst zones.

Gilchrist is a top inflow and outflow county for Levy which makes sense given the reasonable driving distance, and shares 16 out of 20 top occupations in common with Levy and Marion. Union shares 6 out of 10 most important industries with Levy and Marion, including medical and surgical hospitals. It also shares 16 out of 20 most important occupations with Marion. Dixie shows a comparable amount of overlap, with 6 industries shared across Levy, Marion, and Citrus, as well as being a top inflow and outflow county for Levy commuters.

Lastly, Columbia has 18 occupations of importance in common with Marion, one of the highest numbers of overlap with Marion outside of 19 with Clay county. Columbia also overlaps 17 important occupations with Citrus, and 7 industries of importance with both Citrus and Levy.

## Region 6: Madison, Suwannee, Taylor, Hamilton, and Lafayette

Madison, Hamilton, and Taylor are all North Central Opportunity Zones alongside Levy, and Hamilton, Taylor, and Madison were all part of the previously referenced Creating Connections program with Levy. Suwannee and Lafayette also have the advantage of being within a 60-minute commute of Levy

Levy in particular shares the greatest number of top occupations with two counties, Taylor and the previously mentioned Bradford counties, and has the most overlap in industry with Levy, Citrus, Suwannee, and Bradford of all counties assessed. An occupational connection can be drawn between Hamilton and other counties of regional interest, including Suwannee, Dixie, and Gilchrist. The same can be said of an occupation connection between Hamilton and Levy; when compared to Marion and Citrus, they have relatively fewer occupations in common.

## Appendix:

### *Appendix 1. Top Inflow and Outflow Counties for Citrus*

#### **Citrus County**

<b>Top 5 Inflow Counties:</b>	<b>Average Percent of All Inflow Workers</b>
Hernando	26.11%
Marion	25.26%
Levy	11.49%
Sumter	7.32%
Pasco	5.47%

<b>Top 5 Outflow Counties:</b>	<b>Average Percent of All Outflow Residents</b>
Marion	28.75%
Sumter	21.00%
Hernando	15.62%
Hillsborough	7.37%
Lake	6.02%

### *Appendix 2. Proportion of Incoming, Outgoing, and In-County Workers, Citrus*

<b>Proportion</b>	
Incoming Workers	12.7%
Outgoing Residents	34.4%
Residents Working In-County	52.9%

### *Appendix 3. Top Inflow and Outflow Counties for Marion*

## Marion County

Top 5 Inflow Counties:	Average Percent of All Inflow Workers
Alachua	13.24%
Citrus	23.85%
Lake	10.52%
Sumter	7.84%
Levy	14.04%

Top 5 Outflow Counties:	Average Percent of All Outflow Residents
Sumter	25.21%
Alachua	20.54%
Orange	5.98%
Lake	19.28%
Citrus	6.34%

Appendix 4. Proportion of Incoming, Outgoing, and In-County Workers, Marion

Proportion	
Incoming Workers	15.6%
Outgoing Residents	29.0%
Residents Working In-County	58.5%

Appendix 5. Top Inflow and Outflow Counties for Levy

## Levy County

Top 5 Inflow Counties:	Average Percent of All Inflow Workers
Alachua	22.41%
Gilchrist	20.89%
Marion	19.03%
Dixie	14.68%
Citrus	9.36%

Top 5 Outflow Counties:	Average Percent of All Outflow Residents
Alachua	54.09%
Marion	17.62%
Gilchrist	5.98%
Citrus	5.88%
Dixie	2.92%

Appendix 6. Proportion of Incoming, Outgoing, and In-County Workers, Levy

Proportion	
Incoming Workers	14.4%

Outgoing Residents	55.1%
Residents Working In-County	30.53%



## **RECORD OF ACTION/APPROVAL**

### **Consortium Meeting Thursday, October 5, 2023**

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

Regional Planning

#### **BACKGROUND:**

Dr. Shapiro has presented his study regarding factors that the Board and our Consortium members should consider in requesting a regional planning area be designated that involves CareerSource Citrus Levy Maron

Three other current local workforce boards have expressed interest in partnering with CSCLM in regional planning. They are LWDA 6, 7 and 9

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

Dr. Shapiro's study supports engaging LWDA 6, 7 and 9.

#### **STAFF RECOMMENDATIONS:**

Approve that we regionally plan with LWDA 6, 7 and 9.

Approve sending a letter to the Governor requesting that he designate LWDA 6, 7, 9 and 10 as a regional planning area.

#### **COMMITTEE ACTION:**

#### **BOARD ACTION:**



## **RECORD OF ACTION/APPROVAL**

Consortium, Wednesday, October 5, 2023  
Board Meeting, Wednesday, September 27, 2023  
Executive Committee, Wednesday, September 13, 2023

### **TOPIC/ISSUE:**

2023-2024 Budget

### **BACKGROUND:**

The draft budget was previously approved at the June Executive and Board meetings.

### **POINTS OF CONSIDERATION:**

This budget reflects final rollover funds for all grants.

This budget includes the proposed transfer of DW to AD funding.

### **STAFF RECOMMENDATIONS:**

Approve the final 2023-2024 budget.

### **COMMITTEE ACTION:**

Fred Morgan made a motion to accept the final 2023-2024 Budget. Pete Beasley seconded the motion. Motion carried.

### **BOARD ACTION:**

Deb Stanley made a motion to accept the final 2023-2024 Budget. Dr. Mark Paugh seconded the motion. Motion carried.

### **CONSORTIUM ACTION:**

BUDGET - CSCLM																				
PY 2023(JULY 2023 - JUNE 2024)																				
9/30/2023	*			9/30/23	*	12/31/23	6/30/24	3/31/2024	*		9/30/23	12/31/23		9/30/23	12/31/23	6/30/24	*	9/30/23	*	
ITA requirement: 35%	ADULT	YOUTH	TAA	DISL. WORKER	LVER	RURAL	Re-Entry Nav	YTH BUILD 4	VOC REHAB	WAGNER PEYSER	VETERAN DVOP	WTP	SNAP	RECOVERY NAVIGATOR	RAPID RESPONSE	RWB 6	REA	UN- RESTR	TOTAL	
REVENUE																				
P.Y. 2023 CONTRACTS	1,162,150	1,121,786	-	696,932	-	62,500	86,000			193,475	21,263	1,547,640	105,000	-	125,000	5,977	-	-	5,127,723	
CARRYFORWARD	308,327	59,276	22,913	767,457	40,325	-	9,809	439,963	66,938	800	13,549	136,457	96,329	33,670	-	-	185,468	388,357	2,569,637	
INCENTIVES/SUPPLEMENTAL	-	-	-	98,532	-	-	-	-	-	-	-	-	-	-	-	-	-	-	98,532	
TRANSFER	800,000	-	-	(800,000)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
TOTAL REVENUE	2,270,477	1,181,062	22,913	762,921	40,325	62,500	95,809	439,963	66,938	194,275	34,812	1,684,097	201,329	33,670	125,000	5,977	185,468	388,357	7,795,892	
EXPENDITURES																				
TOTAL ITA	40.90%																			
TRAINING:																				
ITA %	40%			43%																
ITA/TRAINING	400,000	-	3,595	2,000	-	28,000	-	-	-	-	-	-	-	-	-	-	-	-	433,595	
OJT	50,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	50,000	
EMPLOYED WORKER	50,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	50,000	
INTERNSHIPS	30,000	-	-	-	-	1,000	-	-	-	-	-	-	-	-	-	-	-	-	31,000	
TRAINING SUPPORT	20,000	-	-	2,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	22,000	
TRAINING STAFF	168,827	-	-	168,827	-	-	-	-	-	-	-	-	-	-	-	-	-	-	337,654	
TOTAL TRAINING	718,827	-	3,595	172,827	-	29,000	-	-	-	-	-	-	-	-	-	-	-	-	924,249	
OPERATING:																				
SUPPORTIVE SVS.	80,000	181,476	-	3,000	-	-	-	196,843	-	-	-	65,000	-	-	-	-	-	-	526,319	
DIRECT CHARGE (STAFF)	100,000	-	-	-	-	-	60,522	-	19,758	-	-	325,611	78,226	6,448	25,000	-	57,798	-	673,363	
ECKERD	20,000	584,524	-	20,000	-	-	-	193,712	-	-	-	-	-	-	-	-	-	-	818,236	
DEO STAFF TRAVEL	-	-	-	-	2,000	-	-	-	-	3,000	4,000	-	-	-	-	-	-	-	9,000	
OPERATING	-	-	-	-	2,000	-	-	-	-	10,000	5,000	-	-	-	-	-	-	32,180	49,180	
TOTAL OPERATING	200,000	766,000	-	23,000	4,000	-	60,522	390,555	19,758	13,000	9,000	390,611	78,226	6,448	25,000	-	57,798	32,180	2,076,098	
PROGRAM SUPPORT:																				
FACILITIES	27,799	78,047	1,251	27,799	9,938	-	9,938	9,243	3,475	70,124	19,877	72,348	10,008	973	2,502	5,977	9,938	-	359,238	-
PROGRAM	127,927	106,649	-	27,765	557	4,038	-	-	2,751	11,489	-	108,761	10,891	898	3,481	-	1,384	-	406,591	-
INFORMATION TECHNOLOGY	120,647	100,580	-	26,185	525	3,808	7,947	-	2,594	1,707	1,182	102,571	10,271	847	3,283	-	1,305	-	383,452	-
OUTREACH	84,975	70,842	-	18,443	370	2,682	-	-	1,827	6,800	832	72,244	7,235	596	2,312	-	919	-	270,078	-
BUSINESS	170,981	-	-	37,110	-	5,397	-	-	3,677	13,681	-	287,907	14,557	1,200	4,652	-	1,849	-	541,011	-
SELF SERVICES	92,592	-	-	20,096	-	2,922	-	-	1,991	7,409	-	155,911	7,883	650	2,519	-	1,002	-	292,975	-
CAREER SERVICES	161,062	-	-	34,957	-	5,083	-	-	3,463	12,888	-	271,204	13,712	1,130	4,382	-	1,742	-	509,625	-
TOTAL PROGRAM SUPPORT	785,985	356,118	1,251	192,356	11,390	23,930	17,885	9,243	19,779	124,098	21,891	1,070,947	74,557	6,294	23,131	5,977	18,139	-	2,762,970	
TOTAL EXPENDITURES	1,704,812	1,122,118	4,846	388,183	15,390	52,930	78,407	399,798	39,537	137,098	30,891	1,461,558	152,783	12,742	48,131	5,977	75,937	32,180	5,763,317	
ADMIN POOL	184,249	32,179	484	38,851	1,233	5,832	8,054	(1,510)	4,191	11,892	2,477	159,411	16,358	1,358	5,184	-	8,023	3,647	481,913	Admin %
GENERAL POOL	72,057	12,585	189	15,194	482	2,281	3,150	(590)	1,639	4,651	969	62,343	6,398	531	2,027	-	3,138	1,426	188,469	7.49%
TOTAL INDIRECT COST RATE	256,305	44,763	674	54,046	1,715	8,112	11,204	(2,100)	5,830	16,542	3,446	221,754	22,756	1,889	7,212	-	11,161	5,073	670,381	
BALANCE	309,360	14,181	17,393	320,693	23,219	1,458	6,198	42,265	21,571	40,635	476	785	25,790	19,040	69,657	0	98,370	351,104	1,362,194	
INDIRECT RATE CALCULATION																				IDCR %
DIRECT TOTAL COSTS	1,704,812	1,122,118	4,846	388,183	15,390	52,930	78,407	399,798	39,537	137,098	30,891	1,461,558	152,783	12,742	48,131	-	75,937	32,180	5,757,340	15.76%
LESS: LEASES	(58,854)	(72,148)	(573)	(22,327)	(4,510)	(1,466)	(7,329)	(22,567)	(2,551)	(32,156)	(9,032)	(54,788)	(8,424)	(761)	(2,381)	-	(5,135)	-	(305,000)	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
SUBAWARD (ECKERDS)	(20,000)	(766,000)	-	(23,000)	-	-	-	(390,555)	-	-	-	-	-	-	-	-	-	-	(1,199,555)	
TOTAL MTDC	1,625,957	283,970	4,273	342,856	10,881	51,464	71,078	(13,323)	36,986	104,942	21,859	1,406,770	144,359	11,981	45,750	-	70,802	32,180	4,252,785	



## **RECORD OF ACTION/APPROVAL**

### **Consortium Meeting Thursday, October 5, 2023**

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

Board Appointment

#### **BACKGROUND:**

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

#### **STAFF RECOMMENDATIONS:**

Accept appointment of the following individual to the CareerSource CLM board of directors effective January 1, 2024:

Richard Andrew (Andy) Starling, IBEW Local 1205

#### **CONSORTIUM ACTION:**





careersourceclm.com

### NOMINATION FORM

FAX: 352 873-7956

EMAIL: [rskinner@careersourceclm.com](mailto:rskinner@careersourceclm.com)

Phone: 352 873-7939, Ext 1203

Name: Richard Andrew Starling

Title: Assistant Business Manager

Name of Business: IBEW Local 1205

Address: 2510 N.W. 6th Street

City: Gainesville County: Alachua Zip Code: 32609

Business Telephone-Ext: 352-376-7701 Fax: 352-376-9922

☐ Private Business Owner/Chief Executive

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

Home Address: 6851 N.E. CR 337

City: Bronson County: Levy Zip Code: 32621

Cell #: 352-318-5410

E-Mail Address: andy@ibew1205.org

#### INFORMATION REQUIRED BY THE STATE - Check all that Apply

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

CareerSource Citrus Levy Marion is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers listed above may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711. If you need accommodations, please call 800 434-5627, ext. 7878 or e-mail [accommodations@careersourceclm.com](mailto:accommodations@careersourceclm.com). Please make request at least three business days in advance.

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



## **RECORD OF ACTION/APPROVAL**

Consortium Meeting, Thursday, October 5, 2023  
Board Meeting, Wednesday, September 27, 2023  
Executive Committee, Wednesday, September 13, 2023

### **TOPIC/ISSUE:**

50% ITA allocation waiver request

### **BACKGROUND:**

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

### **POINTS OF CONSIDERATION:**

Florida Commerce now issues a sliding scale ITA threshold based on annual allocations. Our sliding scale threshold for 23-24 is 40%. We would like to submit a waiver requesting to have that reduced to 30%. While our normal expenditures are around 40% each year, we would like additional flexibility.

### **STAFF RECOMMENDATIONS:**

Approve the submission of the 2023 ITA allocation waiver request.

### **COMMITTEE ACTION:**

Jeff Chang made a motion to approve the submission of the 2023 ITA allocation waiver request. Carl Flanagan seconded the motion. Motion carried.

### **BOARD ACTION:**

This item appeared on the board meeting agenda as a consent agenda item. Deb Stanley made a motion to approve the consent agenda items from the Performance and Monitoring, Nominating, and Executive committee meetings. Charles Harris seconded the motion. Motion carried.

### **CONSORTIUM ACTION:**



## **RECORD OF ACTION/APPROVAL**

### **Consortium Meeting Thursday, October 5, 2023**

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

Memorandum of Understanding- The School Board of Citrus County as the Governing Board for Withlacoochee Technical College

#### **BACKGROUND:**

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.

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

Such agreements with mandatory partners require the signature of Chief Elected Official.

#### **STAFF RECOMMENDATIONS:**

Requesting required signature from the Chief Elected Official on the Memorandum of Understanding.

#### **COMMITTEE ACTION:**

#### **BOARD ACTION:**



### Documentation Signature Request

Date of Request: 9/12/2023

#### Summary of Documentation:

This agreement formalizes the existing partnership between CSCLM and School Board of Citrus County, Withlacoochee Technical College to provide adult education and workforce services to our mutual customers

#### Reason for Signature Request:

The Workforce Innovation and Opportunity Act requires a MOU be developed and executed between local Workforce Development Board and mandatory partners. MOUs detail service coordination agreements to ensure prompt services to customers and reduce duplication in services.

Has this item been approved by the full consortium? ☐ Yes ☒ No

If yes, what date was it approved? \_\_\_\_\_

Motion Name: \_\_\_\_\_ Second Name: \_\_\_\_\_

If no, when is it scheduled for vote? 10/5/2023

If this has not been approved by the full consortium please state why this requires attention prior to the next scheduled meeting and include the date in which it is required by Florida Commerce, CareerSource Florida, etc.:

The agreement was signed on 8/22/2023 after the last consortium meeting in June. There is no deadline required by Florida Commerce. Local policy is to have the MOU signed by all parties within the first quarter of the new fiscal year

Page(s) requiring signature: Page 8

Staff submitting request: Cathy Galica

# MEMORANDUM OF UNDERSTANDING

Between

Citrus Levy Marion Regional Workforce Development Board, Inc.

OBA CareerSource Citrus Levy Marion

And

The School Board of Citrus County, Florida, as the  
Governing Board for Withlacoochee Technical College

## 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. Furthermore, this mutual agreement details how each required partner will support and contribute to the overall infrastructure costs of the One-Stop system.

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:

- A. 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.
- B. 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.
- C. Improve career exploration, educational attainment and skill 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 the School Board of Marion County 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

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

### Locally Operated by CSCLM through agreement with DOL

- H. YouthBuild\*

### MOU Provided at State Level

- I. WIOA Title II Adult Education and Literacy\*
- J. WIOA Title IV Vocational Rehabilitation\*
- K. Carl Perkins Career and Technical Education\*

### MOU with CSCLM

- L. Title V Older Americans Act aka SSCEP\*
- M. Job Corps\*
- N. Community Action Agencies\*
- O. Housing Authorities\*
- P. Agencies serving individuals with disabilities
- Q. Agencies serving youth with barriers to employment
- R. Early Learning Coalitions
- S. Homeless Continuum of Care organizations
- T. Veteran Agencies
- U. Economic Development
- V. Support Service Providers
- W. 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:

- A. The One-Stop System partner agrees to participate in joint planning, plan development, and modification of activities to result in:
  - I. Continuous partnership building;
  - II. Continuous planning responsive to State and Federal requirements;
  - III. Responsive to specific local and economic conditions including employer needs;
  - IV. Solutions to common data collection and reporting needs;
- B. Make available to customers through the One-Stop System the services that are applicable to the partners' programs
- C. Participate in the operation of the One-Stop System consistent with the agreed upon "service integration" following in the next part, number 5
- D. Participate in capacity building and staff development activities
- E. Ensure 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 The School Board of Citrus County, Florida ("School Board") agree to the following:

This agreement establishes that the duly authorized agent of the recipient agrees to satisfy the requirements of 34 CFR 361.505 and 34 CFR 361.720.

This agreement formalizes the existing partnership between CSCLM and School Board to provide adult education and workforce services to our mutual customers. CSCLM and School Board recognize that blended services provided by all required and optional partners contributes to the One Stop 'system' and neither independently creates the 'system'. The combination of services provides employment and educational counseling and access to partner programs through direct referral and electronic access points within each office. CSCLM customers are counseled on all aspects of employment and education options available through educational entities and funding assistance

provided through Titles I, II and IV funds under the WIOA. Appropriate referrals for intra-agency assistance are made between agencies through established contacts within each department and will be made in writing via e-mail between those contacts. School Board may refer training program completers and those customers in need of additional financial assistance to CSCLM for assessment and counseling regarding their individual needs.

Both agencies agree to maintain full programmatic accessibility and compliance with all applicable laws to ensure that individuals have equal ability to access available services as further discussed in sections 8 and 9 of this document. This access includes full ADA compliance, use of assistive technology and provision of accommodations that may be necessary for individuals with additional barriers.

Both parties acknowledge and agree to the requirement of the Infrastructure Funding Agreement (IFA). The completed IFA will be mutually agreed upon and is detailed in section 12.

#### 6. Resource and Cost Sharing

This MOU between CSCLM and School Board is an agreement of service integration.

#### 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 if applicable to this agreement.

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, gender, or pregnancy.

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 the date below, or until it is modified, extended, or terminated in accordance with this section. Regardless of duration, this MOU shall be reviewed every year. 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. This MOU will be in effect until: June 30, 2024.

#### 11. E-Verify

A. Pursuant to Fla. Stat. § 448.095, effective January 1, 2021, all Contractors shall use the U.S. Department of Homeland Security's E-Verify system <https://e-verify.uscis.gov/emp>, to verify the employment eligibility of all employees hired during the term of this Agreement.

B. Subcontractors

(i) Contractor shall also require all subcontractors performing work under this Agreement to use the E-Verify system for any employees they may hire.

(ii) Subcontractors shall provide Contractor with an affidavit stating the subcontractor does not employ, contract with, or subcontract with an unauthorized alien, as defined by Fla. Stat. § 448.095.

(iii) Contractor shall provide a copy of such affidavit to the School Board upon receipt and shall maintain a copy for the duration of the Agreement.

(iv) Contractor must provide evidence of compliance with Florida Statute § 448.095 beginning January 1, 2021. Evidence may consist of, but is not limited to, providing notice of Contractor's E-Verify number.

C. Failure to comply with this provision is a material breach of the Agreement and the School Board may choose to terminate the Agreement at its sole discretion. Contractor may be liable for all costs associated with School Board securing the same services, including but not limited to, higher costs for the same services and rebidding costs (if necessary).

D. For purposes of this provision, "Contractor" means a person or entity that has entered or is attempting to enter into a contract with a public employer to provide labor, supplies, or services to such employer in exchange for salary, wages, or other remuneration. "Subcontractor" means a person or entity that provides labor, supplies, or services to or for a contractor or another subcontractor in exchange for salary, wages, or other remuneration during the term of this Agreement.

#### 12. Public Records

CSCLM understands the broad nature of these laws and agrees to comply with Florida's Public Records Laws relating to records retention.

A. To the extent that CSCLM meets the definition of "contractor" under § 119.0701, Fla. Stats. (2017), and in addition to other contract requirements provided by law, the CSCLM agrees that

it is acting as a contractor on behalf of SCHOOL BOARD as provided under § 119.0701(a) and as such it will comply with Florida's Public Records Law. Specifically, CSCLM agrees that it will:

- i. Keep and maintain public records that ordinarily and necessarily would be required by SCHOOL BOARD in order to perform the services performed by CSCLM under contract.
- ii. Provide the public with access to such public records on request from SCHOOL BOARD'S custodian of public records.
- iii. Provide SCHOOL BOARD with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law.
- iv. Ensure the public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if CSCLM does not transfer the records to the public agency.
- v. Upon completion of the contract, transfer, at no cost, to SCHOOL BOARD all public records in possession of CSCLM or keep and maintain public records required by the public agency to perform the service. If CSCLM transfers all public records to the public agency upon completion of the contract, CSCLM shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If CSCLM keeps and maintains public records upon completion of the contract, CSCLM shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to SCHOOL BOARD, upon request from SCHOOL BOARD'S custodian of public records, in a format that is compatible with the information technology systems of the public agency.
- vi. The failure of the CSCLM to comply with the provisions set forth herein shall constitute a default and material breach of this Agreement, which may result in immediate termination, with no penalty to School Board.

B. IF CSCLM HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO CSCLM'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF RECORDS OFFICER, EMAIL ADDRESS: BLAIRL@CITRUS.K12.FL.US AND PUBLICRECORD@CITRUSSCHOOLS.ORG; TELEPHONE NUMBER: 352-726-1931 ext. 2211, 1007 W. MAIN STREET, INVERNESS, FLORIDA 34450.

## **12. Infrastructure and Cost Sharing**

All partners within the Citrus Levy Marion One-Stop system operate with lean budgets and have long standing relationships that have been established to braid and blend funding to maximize the impact of resources available to the citizens of our region. Due to this, the partners on this MOU are not currently co-located within the American Job Center but provide support of its operations through in-kind contributions that have a positive monetary impact on the day-to-day operations and expand the breadth of services available. CSCLM and School Board agree that infrastructure support for proportionate benefit from the One-Stop system is provided in the following methods:

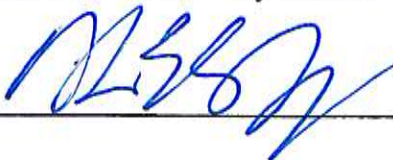
- A. Use of digital technology for shared customers to access online resources provided by CSCLM.
- B. Provision of CSCLM outreach materials to the general public
- C. Educational support and counseling to CSCLM referred and enrolled students
- D. Access to classes in targeted occupations to enhance local talent pipeline
- E. Access to meeting space within the partner's facilities to meet with students to discuss CSCLM services and programmatic enrollment.

- I. Space usage provides expansion of services for CSCLM and reduces additional costs of itinerate space when needed
- F. Ongoing partnership for outreach and connection of Adult learners to the One-Stop system for the benefit of talent pipeline establishment
  - I. Scheduled tours and visits to the Marion County Career Center by the students at Withlacoochee Technical College in targeted technical classes to promote availability of workforce services to emerging talent pools
  - II. CSCLM staff to connect directly with GED and ESOL students on-campus to promote partnership and workforce services availability.

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13. Signatures

Citrus Levy Marion Regional Workforce  
Development Board, Inc. d/b/a  
CareerSource Citrus Levy Marion

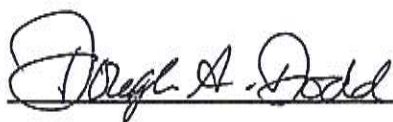
By 

Name: Thomas E. Skinner, Jr.

Title: Chief Executive Officer

Date: 8/22/2023

The School Board of Citrus County  
Florida

By 

Name: Douglas A. Dodd

Title: Board Chairman

Date: 8/8/23

**Chief Elected Official**

By: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

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## Strategic Policy

<b>Title:</b>	Regional Planning Areas Strategic Policy
<b>Adopted:</b>	
<b>Effective:</b>	

### I. PURPOSE AND SCOPE

A Regional Planning Area is made up of two or more local workforce development areas to improve workforce system alignment within larger economic development areas to support economic mobility, growth and prosperity.

The intended goals of establishing Regional Planning Areas across neighboring local workforce development areas include but are not limited to:

- Aligning workforce strategies to address the needs of shared industry sectors, employers and significant populations of job seekers.
- Addressing common labor shortages and worker skills gaps with aligned service strategies.
- Realizing system efficiencies through reducing resource costs (monetary, time or other).

Beyond establishing formal Regional Planning Areas as defined in this policy, local workforce development areas are encouraged to engage in other partnership opportunities with the broader CareerSource Florida network that achieves these goals.

### II. BACKGROUND

Public Law 113 – 128, The Workforce Innovation and Opportunity Act (WIOA), requires the state workforce development board to assist the Governor in developing, implementing and modifying a State Workforce Development Plan. Florida's WIOA State Plan describes Florida's strategy for supporting the publicly funded workforce system. WIOA Section 106 describes the process by which the Governor designates local workforce development areas within the state. Local areas are designated consistent with labor market areas in the state;

are consistent with regional economic development areas in the state; and have available the federal and non-federal resources necessary to effectively administer WIOA activities including whether the areas have the appropriate education and training providers such as institutions of higher education and area career and technical education schools.

The Reimagining Education and Career Help (REACH) Act was signed into law in June 2021. The REACH Act addresses 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 access to a more integrated workforce and education system for all Floridians. 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.

In December 2021, the CareerSource Florida Board of Directors approved CareerSource Florida Policy 2021.12.09.A.1 – Comprehensive Employment, Education and Training Strategy. This strategic policy encourages local workforce development boards to use all allowable resources and to collaborate with all partners to develop innovative strategies that create simplified access to Florida's workforce system and provide excellent customer service for Florida's job seekers and businesses; focus on continuous improvement, strengthen partnerships to leverage shared resources and eliminate duplication of services; align programs and resources to meet local market demand in occupations that lead to self-sustaining jobs; and, implement data-driven accountability measures and quantifiable outcomes related to training programs, employment and services to Florida businesses.

On Feb. 23, 2023, the CareerSource Florida Board of Directors approved the Florida Workforce System Transformation Plan, a three-pillar plan directing the CareerSource Florida network to modernize the local workforce development board governance structure in the nation's third-largest state and better position the system to be more customer-centered, cost effective and responsive to meet workforce talent demands. The plan focuses on:

- Alignment and consolidation for local workforce development boards.
- System-wide improvements for improved customer consistency and better leveraging of public funds; and
- Regional planning to further promote workforce system alignment with education and economic development and optimize opportunities for regional growth.

The Governor subsequently affirmed the CareerSource Florida Board of Directors' recommendation to realign and consolidate local workforce development areas as outlined in the Florida Workforce System Transformation Plan.

### **III. POLICIES AND PROCEDURES**

The Florida Workforce System Transformation Plan directs the CareerSource Florida network to establish Regional Planning Areas. The requirements for Regional Planning Areas in this policy are established by WIOA, Florida law, and actions by the CareerSource Florida Board of Directors.

CareerSource Florida, in collaboration with the Governor's REACH Office, FloridaCommerce and local workforce development boards, shall develop recommendations to the Governor and state workforce development board for the designation of Regional Planning Areas for the state. Local workforce development boards may request designation as a Regional Planning Area by submitting the request and supporting documentation to the state workforce development board for consideration.

The state, after consultation with local workforce development boards and chief local elected officials for the Regional Planning Area, shall require the local workforce development boards and chief local elected officials within a planning region to include the shared Regional Planning Area objectives, activities, and performance elements as a regional addendum to each local workforce development board's WIOA local plan. The state shall provide technical assistance and labor market data, as requested by local areas, to assist with such regional planning and subsequent service delivery efforts.

Regional Planning Area and local WIOA plans must align with Florida's WIOA Statewide Plan.

#### **Requirements for Regional Planning Areas:**

- Each local workforce development area must be part of a Regional Planning Area.
- Regional Planning Areas must include, at a minimum, two contiguous local workforce development areas within Florida.
- Regional Planning Areas shall have relevant relationships as evidenced by population centers, commuting patterns, industrial composition, location quotients, labor force conditions and geographic boundaries.
- Regional Planning Areas shall establish a shared regional service strategy with a defined goal.
- Regional planning areas shall establish administrative cost arrangements across local workforce development areas. Acceptable examples of administrative cost arrangements include but are not limited to shared staff, technology systems, or back-end administrative support tools.
- Chief Local Elected Officials in a new regional planning area **MUST** participate in the regional planning process that results in the inclusion of the shared regional objectives and initiatives as an addendum to each local workforce development board's WIOA plan.
- The regional plan must include a description of activities that result in the following items:
  - Establishment of regional service strategies using cooperative service delivery agreements that include but are not limited to:
    - Consistent eligibility standards and enrollment processes.
    - Common training and coordination of supportive service offerings.
    - Common technology tools and sharing of data within tools outside of Employ Florida.
  - Development and implementation of sector strategies for in-demand sectors or occupations.



- Collection and analysis of regional labor market data.
- Coordination of supportive services.
- Coordination of services with regional economic development services and providers.
- Establishment of agreement concerning how the regional planning area will collectively negotiate performance for the local workforce development areas or the planning region.

#### **IV. AUTHORITIES**

[Public Law 113-128, The Workforce Innovation and Opportunity Act \(WIOA\)](#)

[Chapter 445.003 – 445.007, Florida Statutes](#)

[Chapter 2021-164, Laws of Florida, The Reimagining Education and Career Help Act](#)

[CareerSource Florida Strategic Policy 2000.08.15.I.8D -- Certification of Local Workforce Development Boards](#)

[CareerSource Florida Strategic Policy 2020.02.20.A.1 – Board Governance and Leadership](#)

[CareerSource Florida Administrative Policy 094 – Local Workforce Development Area Designation](#)

[Consolidated Action Item – Reimagining Florida’s Workforce System](#)

#### **V. RESOURCES**

[Reimagining Florida’s Workforce System: A Three-Pillar Plan for Transformation](#)

[Future State Options Report](#)

[Background Research and Analysis Report](#)





<b>Title:</b>	<b>Education and Industry Consortiums</b>
<b>Adopted:</b>	
<b>Effective:</b>	

## I. PURPOSE AND SCOPE

Section 445.007(15), Florida Statutes, requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated workforce service delivery area.

This policy requires local workforce development boards to appoint education and industry consortiums composed of local leaders who provide independent information from stakeholders in their local area. Local workforce development boards shall consider this information in creating strategies and local plans that describe efforts to provide educational and workforce opportunities to businesses and job seekers. The goal is to align educational programming with industry needs at the local level.

This policy applies to local education and industry consortiums and the local workforce development boards that appoint them. Education and industry consortiums act as independent advisory groups. Members do not have any direct or implied authority over local workforce development boards, their membership or employees.

## II. BACKGROUND

Signed into law May 15, 2023, Senate Bill 240, an act relating to education, amended section 445.007(15), Florida Statutes, requiring each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area.

CareerSource Florida surveyed local workforce development boards and education institutions to determine what ongoing activities existed and obtain information and recommendations from local education and industry stakeholders about the availability of education, employment and

training opportunities available to businesses and job seekers in local workforce development areas.

A workgroup was convened to develop a collaborative strategic policy that meets statutory requirements of Senate Bill 240 and aligns all relevant federal, state and local laws and policies. The goal for these consortia is for the local workforce development board to obtain local community-based information related to educational programs and industry needs and provide that information to local workforce development boards to inform programs, services and partnerships in the service delivery area. This approach ensures local workforce development boards are informed about the current workforce and talent needs of their targeted industries and existing educational and training offerings. This approach also affords businesses the opportunity to closely collaborate with workforce and education stakeholders to eliminate barriers and identify innovative talent pipeline opportunities like work-based learning experiences, internships, preapprenticeship, registered apprenticeship, on-the-job training, customized training, Incumbent Worker Training and other training opportunities.

The workgroup, which included stakeholders from education, business, state government and local workforce development boards, met six times and made recommendations informing the strategic policy elements listed below.

### **III. POLICY**

#### **Required Membership**

Each local workforce development board shall create an education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area. The chair of the local workforce development board shall appoint the consortium members. A member of a local workforce development board shall not serve as a member of the consortium. Consortium members shall be appointed for two-year terms beginning on Jan. 1 of the year of the appointment, and any vacancy on the consortium must be filled for the remainder of the unexpired term in the same manner as the original appointment.

The membership of the education and industry consortium must meet the following requirements:

#### **Industry Representative Requirements:**

- Chief Executive Officers or presidents or other executive level staff from the top public and private employers in the local area.
- Industry representatives should reflect the priority industries in the local area.

#### **Education Representative Requirements:**

- Superintendents, presidents, or other leadership staff from education institutions in the local area that represent both public and private education entities in:
  - K-12 education
  - District Technical Colleges
  - State Colleges
  - Universities
  - Other degree or credential granting institutions in the local area

If a member of the education and industry consortium is unable to attend a meeting, a designee from the members' executive team may attend.

## Meetings

Each education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area must meet at least quarterly. The local workforce development board will ensure that administrative support is provided to the consortium as needed and will be specifically responsible for the following:

- Maintaining a roster of consortium members and posting the current roster on the local workforce development board website.
- Posting scheduled consortium meetings on the local workforce development board website.
- Posting the quarterly reports from each meeting on the local workforce development website.

It is not required that consortium meetings be separately conducted from existing, similar meetings in the local area. Consortium meetings' discussions need only focus on the local labor market needs including:

1. Industry representatives sharing their specific talent development needs or observations on talent in the local area.
2. Education representatives sharing what specific education offerings are available in the local area.

## Reports

Education and industry consortiums in each local area shall provide quarterly reports to the applicable local workforce development board (and locally designated areas) which provide community-based information related to educational programs and industry needs to inform the local workforce development board on programs, services, and partnerships in the service delivery area.

Quarterly reports shall include:

- A record of the consortium members in attendance.
- A summary analysis of the local labor market based on industry representative needs and education offerings.
- Information on priority industry sectors and occupations for the local area.
- Information on the status of existing talent pipelines for in-demand occupations and the need to expand or leverage existing and/or new resources.

Local workforce development boards are encouraged to consider information obtained from the education and industry consortium to determine effective ways to grow, retain and attract talent to the service delivery area.

As noted above, quarterly education and industry consortium reports shall be published on the local workforce development board's website. Links to education and industry consortium reports and rosters shall be included in each local workforce development board's Workforce Innovation and Opportunity Act local plan.

## IV. AUTHORITY

[Public Law 113-128, Workforce Innovation and Opportunity Act \(2014\)](#)

[Chapter 445.004, Florida Statutes](#)

[Chapter 445.007, Florida Statutes](#)

## **V. ATTACHMENTS**

Consortium Member Appointment Letter Template

Consortium Roster Matrix Template

Quarterly Report Template

[Date]

[Appointee name]

[Position]

[Organization]

[Address]

Dear [appointee name]:

Thank you for volunteering to serve on the [name of education and industry consortium].

Section 445.007, Florida Statutes, requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated workforce service delivery area. Local consortiums are required to meet quarterly and provide reports to the local workforce development board that includes community-based information related to educational programs and industry needs. Consortium reports inform the local workforce development board and staff on programs, services and partnerships in the service delivery area.

The relationship between industry and education is vital to the state and local workforce development system. I am confident your representation on this consortium will enhance communication and help ensure the local workforce development board has access to independent and actionable information to enhance workforce opportunities to businesses and job seekers in our local area.

Information about the role of education and industry consortiums is available in the statewide strategic policy [insert link].

Your appointment to the consortium is effective [Jan. 1 or other date if interim appointment is made] and concludes on Dec. 31, [2025]. Thank you again for offering your time, talent and energy to this important initiative. If you have any questions, please do not hesitate to contact [insert local contact].

Sincerely,

[Name]

[Chair]

[Local workforce development board]

cc: [President/CEO, local workforce development board]  
[Senior staff responsible for maintaining consortium rosters]

# [Local Workforce Development Board] [NAME OF EDUCATION AND INDUSTRY CONSORTIUM] ROSTER

## GENERAL INFORMATION

Section 445.007 (15), Florida Statutes, requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated workforce service delivery area.

The chair of the local workforce development board shall appoint the consortium members. A member of a local workforce development board shall not serve as a member of the consortium. Consortium members shall be appointed for two-year terms beginning on Jan. 1 of the year of the appointment, and any vacancy on the consortium must be filled for the remainder of the unexpired term in the same manner as the original appointment.

The membership of the education and industry consortium must meet the following requirements:

### Industry Representative Requirements:

- Chief Executive Officers or presidents or other executive level staff from the top public and private employers in the local area.
- Industry representatives should reflect the priority industries in the local area.

### Education Representative Requirements:

- Superintendents, presidents, or other leadership staff from education institutions in the local area that represent both public and private education entities in:
  - K-12 education
  - District technical colleges
  - State colleges
  - Universities
  - Other degree or credential granting institutions in the local area

If a member of the education and industry consortium is unable to attend a meeting, a designee from the members' executive team may attend.

Chair of consortium: \_\_\_\_\_

Contact information: \_\_\_\_\_

Report prepared by: \_\_\_\_\_

Board contact: \_\_\_\_\_

Date: \_\_\_\_\_

CONSORTIUM ROSTER

NAME	TITLE	ORGANIZATION NAME	INDUSTRY (For Business Partners Only)	PHONE NUMBER	EMAIL ADDRESS	TERM START DATE	TERM END DATE	CONSORTIUM SEAT FILLED

NAME	TITLE	ORGANIZATION NAME	INDUSTRY (For Business Partners Only)	PHONE NUMBER	EMAIL ADRESS	TERM START DATE	TERM END DATE	CONSORTIUM SEAT FILLED



# [Local Workforce Development Board] [Name of EDUCATION AND INDUSTRY CONSORTIUM] QUARTERLY REPORT

## A. GENERAL INFORMATION

Report quarter: \_\_\_\_\_

Date of meeting: \_\_\_\_\_

Report prepared by: \_\_\_\_\_

Local workforce development board contact: \_\_\_\_\_ Date: \_\_\_\_\_

## B. ATTENDANCE

Name	Organization	Industry or Education Organization	Contact Information

Name	Organization	Industry or Education	Contact Information

## B. SUMMARY REPORT

1. Summary analysis of the local labor market based on the industry representative needs and education offerings. (Provide summary)
2. Information on priority industry sectors and occupations for the local area. (Provide summary)
3. Information on the status of existing talent pipelines for in-demand occupations. (Provide summary)

## **Education Consortium Summary**

- Revise current Business and Economic Development Committee to comply.
  - Membership of new BEDC to include:
    - College of Central Florida
    - Citrus County School Board
    - Levy County School Board
    - Marion County School Board
    - Private post-secondary institution
    - Representative from each of the following targeted sectors
      - Manufacturing
      - Logistics
      - Information Technology
      - Healthcare
      - Construction
      - Agriculture
    - Economic Development
      - Citrus County Economic Development Department
      - Nature Coast Business Development Council
      - Chamber and Economic Partnership
- Members cannot be CLM Board members.
- Serve two-year terms, beginning January 2024.
  - Can be reappointed.
- Membership must be top level institutional/business leadership.
  - May designate an alternate to serve if unable to attend.
- Meets Quarterly, issues a report to the CSCLM Board.
  - Meets in CSCLM normal committee cycle.
- Chair appointed by CSCLM Board Chair.



**POLICY  
NUMBER  
090**

## **Administrative Policy**

<b>Title:</b>	Eligible Training Providers List Requirements		
<b>Program:</b>	Workforce Innovation and Opportunity Act		
<b>Effective:</b>	3/1/2016	<b>Revised:</b>	TBD

### **I. PURPOSE AND SCOPE**

The purpose of this policy is to provide guidance to local workforce development boards (LWDBs) on the Eligible Training Provider List (ETPL) and related federal and state requirements, performance standards, data reporting, and procedures for determining initial and continued eligibility of training providers and programs of study.

### **II. BACKGROUND**

Workforce Innovation and Opportunity Act (WIOA) Title I training can be provided through a variety of contract mechanisms, or it may be funded through an Individual Training Account (ITA) that is used to purchase training from an Eligible Training Provider (ETP). ETPs are postsecondary providers of training services that are eligible to receive funds from LWDBs as prescribed in Section 133(b) of WIOA. The ETPL is mandated by Section 122 of WIOA, which requires the Governor, through the state workforce development board, CareerSource Florida, Inc., to establish criteria, information requirements, and procedures on the eligibility of training providers of training services in the state. Additionally, Florida's 2021 Reimagining Education and Career Help (REACH) Act charges the Florida Department of Commerce (FloridaCommerce) with establishing ETP criteria focused on participant outcomes.

The workforce development system established under WIOA emphasizes informed consumer choices, job-driven training, provider performance, and continuous improvement. The quality and selection of training providers and programs of study are vital to achieving these core principles.

### **III. AUTHORITY**

Workforce Innovation and Opportunity Act of 2014, Public Law 113-128

20 Code of Federal Regulations (CFR) 680.400 et seq., Subpart D – Eligible Training Providers

Training and Employment Guidance Letter (TEGL) No. 8-19 and TEGL No. 8-19, Change 1

TEGL No. 13-16

TEGL No. 3-18

TEGL No. 21-22

Section 445.003(7)(b), Florida Statutes (F.S.)

Section 445.004(4)(h), F.S.

Section 1005.21, F.S.

Section 1008.39, F.S.

### **IV. POLICIES AND PROCEDURES**

An ITA may be used to pay for any allowable type of training if the program of training services (also referred to as a “program of study”) is on the ETPL. ETPs are entities that are eligible to receive WIOA Title I-B funds for adult and dislocated worker participants who enroll in training programs, through ITAs. ITAs may also be used for WIOA Title I Youth funds to provide training to older, out-of-school youth, ages 18-24, and in-school youth, ages 16-21.

WIOA requires that each state ensure qualified providers offering a variety of job-driven training programs are available. A training provider must provide a program of study to be included on the ETPL.

#### **A. STATE AND LOCAL ETPL**

FloridaCommerce and the LWDBs must work together to identify ETPs to be included on the state ETPL. LWDBs must select approved training providers from the state ETPL. In addition to the criteria outlined in this policy, LWDBs may add additional requirements for training providers, except registered apprenticeship programs (RAPs), that supplement the criteria and information requirements for an ETP or program of study. This will result in training providers that are on the state

ETPL that may not be eligible for inclusion on the local ETPL; therefore, the local ETPL will be a subset of the state ETPL. LWDBs that do not establish additional requirements through local policy must include all state ETPs on its local ETPL. Note: All ETPs on a local ETPL must first be on the state ETPL.

State and local ETPLs must be maintained in the state's online labor exchange and case management system, Employ Florida. Also, LWDBs must make the state ETPL or their local ETPL, as appropriate, publicly available through their local websites.

## **B. PROVIDER AND PROGRAM ELIGIBILITY UNDER WIOA**

To be eligible to apply for inclusion on the ETPL and to receive training funds under WIOA Section 133(b), the training provider must be one of the following types of entities detailed in 20 CFR 680.410(d):

1. Institutions of higher education such as universities, colleges, or other public or private institutions of higher education that provide programs that lead to a recognized postsecondary credential.
2. RAPs.
3. Other public or private training providers, which may include community-based organizations and joint labor-management organizations.
4. Eligible providers of adult education and literacy activities under WIOA Title II, if these activities are provided in combination with training services as described in 20 CFR 680.350.

Additionally, LWDBs may be included on the ETPL if they meet the conditions of WIOA Section 107(g)(1), which states that authority may be permitted to LWDBs to provide training services pursuant to a request from the LWDB if the local board:

1. Submits a request or an application to FloridaCommerce for approval by the CareerSource Florida Board of Directors, which must include:
  - a. Satisfactory evidence that there is an insufficient number of eligible providers of such a program of training services to meet local demand in the local area;
  - b. Information demonstrating that the LWDB meets the requirements for an eligible provider of training services under WIOA Section 122; and
  - c. Information demonstrating that the program of training services prepares participants for an in-demand industry sector or occupation in the local area; and
2. Makes the proposed request or application available to eligible providers of training services and other interested members of the public for a public comment period of not less than 30 days.

### **C. PROGRAM OF STUDY**

A program of study is a course, class, or structured regimen that provides training leading to:

1. An industry-recognized postsecondary credential, a secondary school diploma, or equivalent;
2. Employment; or
3. Measurable skills gains leading to one of the above.

Training services may be delivered in person, online, or using a blended method or approach. Online training providers may apply and be considered for inclusion on the state and local ETPLs but are required to meet the same eligibility and performance criteria established for classroom-based instruction providers. Training programs must also be made physically and programmatically accessible for individuals who are employed and individuals with barriers to employment, such as persons with disabilities.

ETPs may offer programs of study that include:

1. Occupational skills training including training for non-traditional employment;
2. On-the-Job Training (OJT);
3. Incumbent Worker Training (IWT);
4. Programs that combine workplace training with related instruction, which may include cooperative education programs;
5. Private-sector training programs;
6. Skill upgrading and retraining;
7. Entrepreneurial training;
8. Job readiness training provided in combination with training services or transitional jobs;
9. Adult education and literacy activities, including activities of English language acquisition and integrated education and training programs, provided concurrently or in combination with services provided in the programs listed in numbers 1. through 7., above; and
10. Customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training.

### **D. INITIAL ELIGIBILITY (TRAINING PROVIDERS)**

Initial eligibility for the ETPL applies to all training providers except RAPs registered with the Florida Department of Education (DOE). The training provider must supply verifiable, program-specific performance information pursuant to the criteria established by federal regulations and state statutes under which the provider applies



to become an ETP. The information provided must support the training provider's ability to serve participants.

To meet initial eligibility to be included on the ETPL, a training provider must provide the following:

1. A description of the training or educational institution including the provider's address, email, Federal Employer Identification Number (FEIN), and the name of the contact person;
2. Verification the provider is licensed, certified and/or otherwise authorized under Florida law to provide training services (this applies to in-state and out-of-state providers);
3. A detailed description of each program of training services being submitted for initial eligibility determination;
4. Data supporting the cost of attendance (including, but not limited to, tuition and fees);
5. Verification that the program leads to a credential on the Master Credentials List (MCL) and information on any other associated MCL credentials which can be used as part of a sequence in an individual's career lattice;
6. Whether the provider has developed the training in partnership or collaboration with a business or industry (identifying the business or industry);
7. Identification of the in-demand industry sectors and occupations that best fit with the training program;
8. A description of prerequisites, skills, and knowledge required prior to the commencement of the training; and
9. Information related to WIOA performance indicators (employment, median earnings, credentials) other than measurable skills gains.

All eligibility determinations are made based on the review of required information, which must be submitted through the ETPL portal in Employ Florida, as outlined in **Section IV. I – ETPL Portal** of this policy.

Training providers seeking initial eligibility determinations should contact an LWDB in the local area or planning region in which they plan to operate. The LWDB will provide the training provider with guidance and assistance with the ETPL application process and requirements, as needed. The LWDB will review the application to ensure documentation requirements are met and notify the State ETPL Coordinator via email at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov) that a determination of initial eligibility request has been submitted. When conducting a preliminary review of training provider applications, the LWDB must do so using only the state's criteria. The LWDB should not apply any additional local requirements or criteria during the preliminary review process.

The State ETPL Coordinator will approve or deny the application and notify the training provider of the determination through Employ Florida or the training provider's preferred mode of communication as indicated in the application. If approved, the ETP will be added to the state ETPL.

Alternatively, training providers may directly contact the State ETPL Coordinator at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov) to request an initial eligibility determination. The State ETPL Coordinator will review the application to ensure that all documentation requirements are met. The State ETPL Coordinator will follow the aforementioned process for determining eligibility and providing notification to the training provider for approval or denial of the initial eligibility request.

Training providers and the programs of study that are approved will receive initial eligibility for one year and will be subject to the continued eligibility requirements subsequent to their initial eligibility period.

#### **E. INITIAL ELIGIBILITY (PROGRAMS OF STUDY)**

A training provider's request for an initial eligibility determination must be accompanied by a request for initial eligibility determination for at least one program of study. A training provider may request initial eligibility determinations for multiple programs of study, but each program of study is reviewed independently. When an ETP with continued eligibility for one or more programs of study requests that a new program of study be added to the ETPL, the new program of study will undergo an initial eligibility determination and may be approved or denied.

Training providers seeking initial eligibility for a program of study should contact an LWDB in the local area or planning region in which they plan to operate. The LWDB will provide the training provider with guidance and assistance with the ETPL application process and requirements, as needed. The LWDB will review the application to ensure documentation requirements are met and notify the State ETPL Coordinator via email at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov) that a determination of initial eligibility request for a program of study has been submitted.

All eligibility determinations are made based on the review of required information, which must be submitted through the ETPL portal in Employ Florida, as outlined in **Section IV. I – ETPL Portal** of this policy. The State ETPL Coordinator will approve or deny the program application and notify the training provider of the determination(s) through Employ Florida or the preferred mode of communication indicated in the application for initial eligibility.

Alternatively, training providers may directly contact the State ETPL Coordinator at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov) to request an initial eligibility determination for one or more programs of study. The State ETPL Coordinator will review the application to ensure that all documentation requirements are met. The State ETPL Coordinator will follow

the aforementioned process for determining eligibility and providing notification to the training provider for approval or denial of the initial eligibility request.

## **F. CONTINUED/SUBSEQUENT ELIGIBILITY**

After a training provider has completed the one-year initial eligibility period, the training provider is required to apply for continued eligibility and recertify their program(s) of study every two years to maintain their eligibility for the ETPL. This process requires submission of performance and cost information for each program of study listed on the state ETPL.

Applications for continued eligibility must be submitted three months prior to the end of their current eligibility period. Training providers applying for continued eligibility of programs of study must log in to the ETPL portal to review and update all required fields and forms for each program of study for which continued eligibility is being sought. If the LWDB is assisting the training provider with their subsequent eligibility, the LWDB will review the program application to ensure all documentation requirements are met and notify the State ETPL Coordinator that a continuing eligibility request has been submitted for the program(s) of study. The State ETPL Coordinator will review all information provided and notify the LWDB and the provider of approval or denial through Employ Florida or the preferred mode of communication outlined in the application.

Each training provider seeking continued eligibility must supply the following information as required by 20 CFR 680.410:

1. Verification the provider is licensed, certified, or otherwise authorized under Florida law (if applicable) to be a provider of training services. This requirement applies to in-state and out-of-state providers.
2. Information reported to state agencies on federal and state training programs other than WIOA Title I-B programs as listed below:
  - a. The total number of persons enrolled in the program;
  - b. The total number of WIOA participants enrolled in the program;
  - c. The total number of persons completing the program;
  - d. The total number of WIOA participants completing the program;
  - e. Quality<sup>1</sup> of the program of study including a program that leads to a recognized postsecondary credential;
  - f. Provider's ability to offer industry-recognized certificates and credentials;
  - g. The total number of persons awarded a Recognized Postsecondary Credential (or other credential, if applicable);

<sup>1</sup> Florida defines quality as training programs that meet the minimum criteria as defined in this policy as well as programs that develop skills valued by priority industry sectors.

- h. The total number of WIOA participants awarded a Recognized Postsecondary Credential (or other credential, if applicable);
- i. The total number of persons employed after completing the program;
- j. The total number of WIOA participants employed after completing the program;
- k. Data identifying the cost of attendance and costs of tuition and fees for WIOA participants completing the program;
- l. Information on recognized postsecondary credentials (or other credential, if applicable) received by WIOA participants;
- m. Whether the credential can be used in conjunction with other credentials as part of a sequence to move an individual along a career pathway or up a career ladder;
- n. Description of how the provider will ensure access to programs of study throughout the state, including in rural areas, and using technology (as applicable);
- o. Description of provider's ability to provide trainings that are physically and programmatically accessible for individuals who are employed and individuals with barriers to employment, including individuals with disabilities;
- p. Information reported to state agencies with respect to federal and state programs of study (other than the program carried out under WIOA), including one-stop partner programs;
- q. Performance on WIOA performance indicators;
- r. The degree to which programs of study relate to in-demand industry sectors and occupations in the state;
- s. Timeliness and accuracy of ETP's performance reports; and
- t. Any additional factors that are determined appropriate within the parameters of WIOA and statutes.

## **G. REGISTERED APPRENTICESHIP PROGRAMS**

In accordance with the National Apprenticeship Act (NAA) (50 Stat. 664, chapter 663; 29 U.S.C. 50 et seq.), entities that carry out RAPs are exempt from the initial and continued eligibility requirements described in this policy. RAPs must be included and maintained on the ETPL until:

- 1. The RAP notifies FloridaCommerce it no longer wants to be included on the list;
- 2. The program becomes deregistered under the National Apprenticeship Act;
- 3. The program is determined to have intentionally supplied inaccurate information; or
- 4. A determination is made by FloridaCommerce that the RAP substantially violated any provision of Title I of WIOA or the WIOA regulations, including 29 CFR part 38.

Because RAPs are exempt from all initial and continued eligibility requirements, the LWDBs may not impose additional criteria or information requirements for RAP sponsors except as outlined in Training and Employment Guidance Letter Nos. 08-19 and 08-19, Change 1, and TEGL No. 13-16, Change 1.

A RAP is an ETP if it is registered with DOE, Office of Apprenticeship (OA), or any other state's State Apprenticeship Agency (SAA). Although they are automatically eligible for ETPL inclusion, RAP sponsors seeking to have their apprenticeship programs listed on the ETPL must still "opt-in" by informing the State ETPL Coordinator at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov). RAPs opting-in may be referred to the State ETPL Coordinator by CareerSource Florida, LWDBs, or DOE. If a RAP expresses interest in being on the state ETPL, the ETPL Coordinator must request the RAPs provide the following information:

1. Occupations included in the RAP;
2. The name and address of the RAP sponsor;
3. The name and address of the Related Technical Instruction provider and the location of instruction if different from the program sponsor's address;
4. The method and length of instruction; and
5. The number of active apprentices.

RAPs on the state ETPL must be included on all local ETPLs in the state and shall remain on the ETPLs until removed or upon written request for removal by the RAP sponsor to the ETPL Coordinator at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov).

FloridaCommerce will regularly coordinate with USDOL, CareerSource Florida and DOE to ensure that necessary updates are made to any information previously provided by RAP sponsors or training providers. FloridaCommerce will also coordinate with DOE to ensure that RAPs registered with the DOE are made aware that they are eligible for placement on the ETPL, and that DOE is informed when a RAP that is registered with USDOL's OA or another state's SAA contacts FloridaCommerce to opt-in to inclusion on the ETPL.

Apprenticeship programs that are not registered with DOE, OA, or another state's SAA are not considered RAPs and must complete the initial eligibility and continued eligibility procedures. Pre-apprenticeships, including quality registered pre-apprenticeships leading to RAPs, are not automatically approved for inclusion on the ETPL and are not exempt from requirements outlined in this policy. Other programs of training services offered by a RAP sponsor or a RAP's provider of related instruction are likewise not automatically eligible.

## **H. OUT-OF-LOCAL-AREA AND OUT-OF-STATE PROVIDERS**

State policies and procedures may provide for reciprocal or other agreements established with another state to permit the use of ITAs for ETPs in another state. As

such, participants may choose ETPs and programs of study located outside of the state or local area if the program is on the state's ETPL and in accordance with state and local area policies.

Out-of-state postsecondary training institutions that are not operating in Florida are not required to be licensed by the Florida Commission for Independent Education (CIE). However, out-of-state providers must provide the following information:

1. Information needed for initial eligibility or continuing eligibility determination;
2. Evidence that the institution (and applicable programs) is accredited by an accreditation agency approved by the U.S. Department of Education;
3. Evidence that the institution meets the licensing requirements of its home state; and
4. Evidence that the institution is identified as active on the ETPL in its state of origin or native state. To provide performance information for its programs, out-of-state providers are required to report their student completion data to FloridaCommerce under established reporting mechanisms.

Out-of-local area and out-of-state training providers must request an initial eligibility determination for each program of study to be included on the state ETPL. Out-of-state providers must also provide documentation, uploaded to the ETPL portal, which validates the above-referenced criteria. These training providers must contact the state ETPL Coordinator directly to request their initial eligibility and the initial eligibility of their programs of study.

## **I. ETPL Portal**

The state ETPL is managed by FloridaCommerce and maintained in Employ Florida, the state's online labor exchange and case management system. Employ Florida connects employers and job seekers and provides information about training opportunities available in the state, including training program services eligible for funding under WIOA Section 133(b).

The ETPL portal is the platform used to maintain ETPLs and record consumer information, including, but not limited to, cost and performance information for each approved program of study. The ETPL portal is the mechanism used by FloridaCommerce to manage the ETPL process, and by LWDBs and training providers to apply for initial eligibility and re-apply for continued eligibility.

The ETPL portal supports WIOA participants in making informed choices about ETPs and programs of study and allows FloridaCommerce to disseminate state and local ETPLs to employers, training providers, workforce staff, One-Stop career center partners, and the public, including individuals with disabilities and individuals with limited English proficiency. Consumer choice is ensured by making the state and

local ETPLs, accompanied by performance and cost information, widely available and easily accessible. ETPLs must be disseminated in a format that facilitates comparison between programs of study and is searchable, user-friendly, and easily understood by individuals seeking information on training outcomes.

#### **J. PERFORMANCE CRITERIA**

As required by Section 445.003(7)(b), F.S., FloridaCommerce must establish the minimum criteria a training provider must achieve for completion, earnings, and employment rates of eligible participants. Once criteria are established, training providers will be required to meet at least two of the minimum criteria for subsequent eligibility.

Like the RAP exemption from the eligibility requirements, RAPs also are exempt from ETP performance reporting requirements in WIOA Sections 116(d)(4) and 122, including any additional ETP reporting requirements that have been added by the state or local area.

#### **K. ANNUAL REPORTING**

No later than Aug. 31 of each year, training providers must upload information into the ETPL portal on all enrolled and completer individuals for each program of study being considered for continued eligibility. This student data must be submitted each year for each program of study and must include the social security numbers for each enrolled and completer individual to allow for the calculation of minimum performance levels as required in 20 CFR 680.460(g).

The ETPL portal provides a secure solution for the transmission of Personally Identifiable Information (PII). ETPs, excluding RAP sponsors, must upload student data including the social security numbers and completed training of all individuals enrolled during a specific timeframe as determined by policy. Any transmission of PII shall occur in accordance with FloridaCommerce security policies and any disclosure of PII from an education record must be carried out in accordance with the Family Education Rights and Privacy Act (FERPA), including provisions related to prior written consent. As allowed pursuant to 34 CFR 99.31, DOE has designated FloridaCommerce as an authorized representative to enforce or comply with federal legal requirements relating to WIOA.

#### **L. DENIAL, DEACTIVATION, REMOVAL, OR LOSS OF PROVIDER OR PROGRAM ELIGIBILITY**

There are circumstances under which training providers may be denied, deactivated, removed, or lose their eligibility for inclusion on the state ETPL, as outlined below. Prior to approving an ITA for a WIOA-eligible individual, LWDBs must ensure that

training providers and program of study are, or continue to be, included on the ETPL at the time the participant is enrolled in the program of study.

### **(1) Denial**

A program of study that FloridaCommerce determines does not meet the eligibility requirements shall be issued a denial notice within 30 calendar days of FloridaCommerce's receipt of the application. A separate denial notice will be issued for each program of study being denied and will include the reason(s) for denial and provide appeal rights, as applicable.

### **(2) Deactivation**

Once an ETP or program of study is approved, it will remain on the state's ETPL through the continued eligibility period of two years unless removed by FloridaCommerce for documented training provider and/or program of study violations. Training providers or programs of study are subject to deactivation and removal from the ETPL if:

1. FloridaCommerce determines the training provider intentionally supplied inaccurate information or substantially violated any provision of Title I of WIOA regulations, including 29 CFR Part 38;
2. The program of study fails to meet the states' minimum performance levels as required in 20 CFR 680.460(g); or
3. The training provider loses its license or accreditation from its accrediting body.

### **(3) Loss of Eligibility and Removal**

A program of study may be removed from the state ETPL if:

1. The training provider fails to supply participant data required for the performance review by the annual due date of Aug. 31.
2. It is determined that the training provider intentionally supplied inaccurate information or substantially violated any provisions of Title I of WIOA or the WIOA regulations, including 29 CFR part 38.
3. It is determined that the provider is engaging in fraud or other criminal acts, incapacity, unfitness, neglect of duty, official incompetence, irresponsibility, misfeasance, malfeasance, gross mismanagement, waste, nonfeasance, or lack of performance.

FloridaCommerce will electronically send a notice of removal from the ETPL to the LWDBs and to the training provider. LWDBs must not issue a participant an ITA for a training provider/program of study that is determined to have lost eligibility for inclusion on the ETPL. If WIOA participants are already enrolled



and have received an ITA for a training provider/program of study that subsequently becomes deactivated or removed from the ETPL, LWDBs may allow enrolled participants to complete the training program; however, no new enrollments may occur. LWDBs must develop local operating procedures to ensure no enrollments are made after the effective date of the notice of removal. Procedures should also include how any existing participants who are enrolled in the program of study will be handled.

#### **(4) Re-application**

Training providers may reapply under the initial eligibility criteria provided in this policy.

### **M. APPEALS**

For an appeal of any decision made at the state level, the appellant shall follow the appeals procedure established by FloridaCommerce. For an appeal of any decision made by an LWDB, the appellant shall follow the appeals procedure established in its local plan by the LWDB making the decision.

### **N. ETPL AND NON-ITA TRAINING SERVICES**

There are exceptions to the required use of the ETPL for ITA-funded training by LWDBs. In the following situations covered by these exceptions, a contract for services between the LWDB and the training provider may be attained and implemented to ensure services are provided instead of selecting a training provider from the state ETPL.

#### **(1) Work-Based Training**

WIOA supports training and work experience for job seekers through work-based training, which is coordinated by LWDBs through collaboration with local employers. These activities, like OJT, Customized Training, and IWT do not require inclusion on the ETPL, in accordance with 20 CFR 680.530. Please see [Administrative Policy 100](#) for additional information on work-based training.

#### **(2) Training Contracts**

A program of study may be provided through training contracts instead of ITAs when there is not sufficient availability of eligible training providers in the local area to accomplish the purpose of an ITA. These contracts may be used for cohort training, per TEGL 21-22, Attachment 1, or in one of the other situations prescribed in 20 CFR 680.320. Because training contracts do not use ITAs, the training provider is not required to be included on the state or local ETPL. The LWDB must have written procedures in place that describe how such a

determination is made and the process for contracting with the training provider(s).

### **(3) Non-WIOA**

The ETPL is a requirement of WIOA and only applies to programs that are supported by WIOA funding. Providers of training services that do not intend to seek WIOA funding do not need to request or pursue ETPL inclusion.

## **V. DEFINITIONS**

- 1. Continued Eligibility:** “Continued Eligibility” or “Subsequent Eligibility” is the eligibility determination that allows training providers to remain on the ETPL until the next eligibility determination.
- 2. Credential:** A WIOA indicator consisting of a recognized postsecondary credential (an industry-recognized certificate or certification, a certificate of completion of an apprenticeship, a license recognized by the state involved or federal government, or an associate or baccalaureate degree) or a secondary school diploma, or its recognized equivalent, during participation in or within one year after exit from the program. All credentials must be included on the Master Credentials List and a credential’s inclusion on the Master Credentials List is sufficient to meet the WIOA definition of “credential.”
- 3. Eligible Training Provider (ETP):** A provider of training services or programs of study (as prescribed in 20 CFR 680.410) that has met the eligibility requirements to receive WIOA funds for providing training service programs to eligible individuals.
- 4. Eligible Training Provider List (ETPL):** A statewide or local compilation of ETPs (as prescribed in 20 CFR 680.410) and approved programs of training services or programs of study (as prescribed in 20 CFR 680.420).
- 5. Individual Training Account (ITA):** A payment agreement with an ETP established on behalf of a WIOA participant for a program of training services or programs of study as prescribed in WIOA section 134(c)(3).
- 6. Initial Eligibility:** The initial determination that allows a training provider and approved program of training services or programs of study onto the state or local ETPL for the first year. An established ETP may also request an initial eligibility determination for a new program of study.
- 7. Local ETPL:** A subset of the state ETPL created when LWDBs establish, through local policy, additional requirements for ETPs and programs of study. All ETPs on a local ETPL are also on the state ETPL, maintained in Employ Florida.

- 8. Master Credentials List (MCL):** Required by the Reimagining Education and Career Help (REACH) Act, the Master Credentials List is a comprehensive list of state-approved degree and non-degree credentials of value that prepare Floridians for in-demand occupations. Credentials on the list satisfy the criteria set forth by the Florida Credentials Review Committee in the Framework of Quality. Programs of study must be on the MCL to be on the state ETPL.
- 9. Personally Identifiable Information (PII):** Information used to distinguish or trace an individual's identity, either alone or when combined with other personal or identifying information, linked or linkable to a specific individual.
- 10. Program of Training Services:** A "Program of Training Services" or "Program of Study" as prescribed in 20 CFR 680.420. Such a program consists of one or more courses or classes, or a structured regimen, leading to one or more of the following: A recognized postsecondary credential, secondary school diploma or its equivalent; employment; or a measurable skills gain toward such a credential or employment.
- 11. Registered Apprenticeship Program (RAP):** A program that is registered with the USDOL Office of Apprenticeship (OA) or any State Apprenticeship Agency (SSA) as prescribed in 20 CFR 680.470(a). Florida's State Apprenticeship Agency is the Florida Department of Education's Office of Apprenticeship.
- 12. Sponsor (of a Registered Apprenticeship Program):** Any person, association, committee, or organization operating an apprenticeship program and in whose name the program is (or is to be) registered or approved.
- 13. State ETPL:** A list of all Eligible Training Providers and Programs who have been approved to receive WIOA funding through ITAs. It is maintained by FloridaCommerce within the state's ETPL MIS portal.
- 14. Training Provider:** A university, college, public or private technical or vocational training institution, a private training company or private instructor, or a company employee who is qualified to provide instruction that leads to a recognized postsecondary credential, license, secondary school diploma or equivalent.

## VI. REVISION HISTORY

Date	Description
3/1/2016	Policy issued by the Florida Department of Economic Opportunity.
TBD	Revised by FloridaCommerce to align with TEGP No. 08-19. Approved by the CareerSource Florida Board of Directors.



## Strategic Policy

<b>Title:</b>	Regional Planning Areas Strategic Policy
<b>Adopted:</b>	
<b>Effective:</b>	

### I. PURPOSE AND SCOPE

A Regional Planning Area is made up of two or more local workforce development areas to improve workforce system alignment within larger economic development areas to support economic mobility, growth and prosperity.

The intended goals of establishing Regional Planning Areas across neighboring local workforce development areas include but are not limited to:

- Aligning workforce strategies to address the needs of shared industry sectors, employers and significant populations of job seekers.
- Addressing common labor shortages and worker skills gaps with aligned service strategies.
- Realizing system efficiencies through reducing resource costs (monetary, time or other).

Beyond establishing formal Regional Planning Areas as defined in this policy, local workforce development areas are encouraged to engage in other partnership opportunities with the broader CareerSource Florida network that achieves these goals.

### II. BACKGROUND

Public Law 113 – 128, The Workforce Innovation and Opportunity Act (WIOA), requires the state workforce development board to assist the Governor in developing, implementing and modifying a State Workforce Development Plan. Florida's WIOA State Plan describes Florida's strategy for supporting the publicly funded workforce system. WIOA Section 106 describes the process by which the Governor designates local workforce development areas within the state. Local areas are designated consistent with labor market areas in the state;

are consistent with regional economic development areas in the state; and have available the federal and non-federal resources necessary to effectively administer WIOA activities including whether the areas have the appropriate education and training providers such as institutions of higher education and area career and technical education schools.

The Reimagining Education and Career Help (REACH) Act was signed into law in June 2021. The REACH Act addresses 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 access to a more integrated workforce and education system for all Floridians. 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.

In December 2021, the CareerSource Florida Board of Directors approved CareerSource Florida Policy 2021.12.09.A.1 – Comprehensive Employment, Education and Training Strategy. This strategic policy encourages local workforce development boards to use all allowable resources and to collaborate with all partners to develop innovative strategies that create simplified access to Florida's workforce system and provide excellent customer service for Florida's job seekers and businesses; focus on continuous improvement, strengthen partnerships to leverage shared resources and eliminate duplication of services; align programs and resources to meet local market demand in occupations that lead to self-sustaining jobs; and, implement data-driven accountability measures and quantifiable outcomes related to training programs, employment and services to Florida businesses.

On Feb. 23, 2023, the CareerSource Florida Board of Directors approved the Florida Workforce System Transformation Plan, a three-pillar plan directing the CareerSource Florida network to modernize the local workforce development board governance structure in the nation's third-largest state and better position the system to be more customer-centered, cost effective and responsive to meet workforce talent demands. The plan focuses on:

- Alignment and consolidation for local workforce development boards.
- System-wide improvements for improved customer consistency and better leveraging of public funds; and
- Regional planning to further promote workforce system alignment with education and economic development and optimize opportunities for regional growth.

The Governor subsequently affirmed the CareerSource Florida Board of Directors' recommendation to realign and consolidate local workforce development areas as outlined in the Florida Workforce System Transformation Plan.

### **III. POLICIES AND PROCEDURES**

The Florida Workforce System Transformation Plan directs the CareerSource Florida network to establish Regional Planning Areas. The requirements for Regional Planning Areas in this policy are established by WIOA, Florida law, and actions by the CareerSource Florida Board of Directors.

CareerSource Florida, in collaboration with the Governor's REACH Office, FloridaCommerce and local workforce development boards, shall develop recommendations to the Governor and state workforce development board for the designation of Regional Planning Areas for the state. Local workforce development boards may request designation as a Regional Planning Area by submitting the request and supporting documentation to the state workforce development board for consideration.

The state, after consultation with local workforce development boards and chief local elected officials for the Regional Planning Area, shall require the local workforce development boards and chief local elected officials within a planning region to include the shared Regional Planning Area objectives, activities, and performance elements as a regional addendum to each local workforce development board's WIOA local plan. The state shall provide technical assistance and labor market data, as requested by local areas, to assist with such regional planning and subsequent service delivery efforts.

Regional Planning Area and local WIOA plans must align with Florida's WIOA Statewide Plan.

#### **Requirements for Regional Planning Areas:**

- Each local workforce development area must be part of a Regional Planning Area.
- Regional Planning Areas must include, at a minimum, two contiguous local workforce development areas within Florida.
- Regional Planning Areas shall have relevant relationships as evidenced by population centers, commuting patterns, industrial composition, location quotients, labor force conditions and geographic boundaries.
- Regional Planning Areas shall establish a shared regional service strategy with a defined goal.
- Regional planning areas shall establish administrative cost arrangements across local workforce development areas. Acceptable examples of administrative cost arrangements include but are not limited to shared staff, technology systems, or back-end administrative support tools.
- Chief Local Elected Officials in a new regional planning area **MUST** participate in the regional planning process that results in the inclusion of the shared regional objectives and initiatives as an addendum to each local workforce development board's WIOA plan.
- The regional plan must include a description of activities that result in the following items:
  - Establishment of regional service strategies using cooperative service delivery agreements that include but are not limited to:
    - Consistent eligibility standards and enrollment processes.
    - Common training and coordination of supportive service offerings.
    - Common technology tools and sharing of data within tools outside of Employ Florida.
  - Development and implementation of sector strategies for in-demand sectors or occupations.

- Collection and analysis of regional labor market data.
- Coordination of supportive services.
- Coordination of services with regional economic development services and providers.
- Establishment of agreement concerning how the regional planning area will collectively negotiate performance for the local workforce development areas or the planning region.

#### **IV. AUTHORITIES**

[Public Law 113-128, The Workforce Innovation and Opportunity Act \(WIOA\)](#)

[Chapter 445.003 – 445.007, Florida Statutes](#)

[Chapter 2021-164, Laws of Florida, The Reimagining Education and Career Help Act](#)

[CareerSource Florida Strategic Policy 2000.08.15.I.8D -- Certification of Local Workforce Development Boards](#)

[CareerSource Florida Strategic Policy 2020.02.20.A.1 – Board Governance and Leadership](#)

[CareerSource Florida Administrative Policy 094 – Local Workforce Development Area Designation](#)

[Consolidated Action Item – Reimagining Florida’s Workforce System](#)

#### **V. RESOURCES**

[Reimagining Florida’s Workforce System: A Three-Pillar Plan for Transformation](#)

[Future State Options Report](#)

[Background Research and Analysis Report](#)



<b>Title:</b>	<b>Education and Industry Consortia</b>
<b>Adopted:</b>	
<b>Effective:</b>	

## I. PURPOSE AND SCOPE

Section 445.007(15), Florida Statutes, requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated workforce service delivery area.

This policy requires local workforce development boards to appoint education and industry consortiums composed of local leaders who provide independent information from stakeholders in their local area. Local workforce development boards shall consider this information in creating strategies and local plans that describe efforts to provide educational and workforce opportunities to businesses and job seekers. The goal is to align educational programming with industry needs at the local level.

This policy applies to local education and industry consortiums and the local workforce development boards that appoint them. Education and industry consortiums act as independent advisory groups. Members do not have any direct or implied authority over local workforce development boards, their membership or employees.

## II. BACKGROUND

Signed into law May 15, 2023, Senate Bill 240, an act relating to education, amended section 445.007(15), Florida Statutes, requiring each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area.

CareerSource Florida surveyed local workforce development boards and education institutions to determine what ongoing activities existed and obtain information and recommendations from local education and industry stakeholders about the availability of education, employment and



training opportunities available to businesses and job seekers in local workforce development areas.

A workgroup was convened to develop a collaborative strategic policy that meets statutory requirements of Senate Bill 240 and aligns all relevant federal, state and local laws and policies. The goal for these consortia is for the local workforce development board to obtain local community-based information related to educational programs and industry needs and provide that information to local workforce development boards to inform programs, services and partnerships in the service delivery area. This approach ensures local workforce development boards are informed about the current workforce and talent needs of their targeted industries and existing educational and training offerings. This approach also affords businesses the opportunity to closely collaborate with workforce and education stakeholders to eliminate barriers and identify innovative talent pipeline opportunities like work-based learning experiences, internships, preapprenticeship, registered apprenticeship, on-the-job training, customized training, Incumbent Worker Training and other training opportunities.

The workgroup, which included stakeholders from education, business, state government and local workforce development boards, met six times and made recommendations informing the strategic policy elements listed below.

### **III. POLICY**

#### **Required Membership**

Each local workforce development board shall create an education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area. The chair of the local workforce development board shall appoint the consortium members. A member of a local workforce development board shall not serve as a member of the consortium. Consortium members shall be appointed for two-year terms beginning on Jan. 1 of the year of the appointment, and any vacancy on the consortium must be filled for the remainder of the unexpired term in the same manner as the original appointment.

The membership of the education and industry consortium must meet the following requirements:

#### **Industry Representative Requirements:**

- Chief Executive Officers or presidents or other executive level staff from the top public and private employers in the local area.
- Industry representatives should reflect the priority industries in the local area.

#### **Education Representative Requirements:**

- Superintendents, presidents, or other leadership staff from education institutions in the local area that represent both public and private education entities in:
  - K-12 education
  - District Technical Colleges
  - State Colleges
  - Universities
  - Other degree or credential granting institutions in the local area

If a member of the education and industry consortium is unable to attend a meeting, a designee from the members' executive team may attend.

## Meetings

Each education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area must meet at least quarterly. The local workforce development board will ensure that administrative support is provided to the consortium as needed and will be specifically responsible for the following:

- Maintaining a roster of consortium members and posting the current roster on the local workforce development board website.
- Posting scheduled consortium meetings on the local workforce development board website.
- Posting the quarterly reports from each meeting on the local workforce development website.

It is not required that consortium meetings be separately conducted from existing, similar meetings in the local area. Consortium meetings' discussions need only focus on the local labor market needs including:

1. Industry representatives sharing their specific talent development needs or observations on talent in the local area.
2. Education representatives sharing what specific education offerings are available in the local area.

## Reports

Education and industry consortiums in each local area shall provide quarterly reports to the applicable local workforce development board (and locally designated areas) which provide community-based information related to educational programs and industry needs to inform the local workforce development board on programs, services, and partnerships in the service delivery area.

Quarterly reports shall include:

- A record of the consortium members in attendance.
- A summary analysis of the local labor market based on industry representative needs and education offerings.
- Information on priority industry sectors and occupations for the local area.
- Information on the status of existing talent pipelines for in-demand occupations and the need to expand or leverage existing and/or new resources.

Local workforce development boards are encouraged to consider information obtained from the education and industry consortium to determine effective ways to grow, retain and attract talent to the service delivery area.

As noted above, quarterly education and industry consortium reports shall be published on the local workforce development board's website. Links to education and industry consortium reports and rosters shall be included in each local workforce development board's Workforce Innovation and Opportunity Act local plan.

## IV. AUTHORITY

[Public Law 113-128, Workforce Innovation and Opportunity Act \(2014\)](#)

[Chapter 445.004, Florida Statutes](#)

[Chapter 445.007, Florida Statutes](#)

## **V. ATTACHMENTS**

Consortium Member Appointment Letter Template

Consortium Roster Matrix Template

Quarterly Report Template

[Date]

[Appointee name]

[Position]

[Organization]

[Address]

Dear [appointee name]:

Thank you for volunteering to serve on the [name of education and industry consortium].

Section 445.007, Florida Statutes, requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated workforce service delivery area. Local consortiums are required to meet quarterly and provide reports to the local workforce development board that includes community-based information related to educational programs and industry needs. Consortium reports inform the local workforce development board and staff on programs, services and partnerships in the service delivery area.

The relationship between industry and education is vital to the state and local workforce development system. I am confident your representation on this consortium will enhance communication and help ensure the local workforce development board has access to independent and actionable information to enhance workforce opportunities to businesses and job seekers in our local area.

Information about the role of education and industry consortiums is available in the statewide strategic policy [insert link].

Your appointment to the consortium is effective [Jan. 1 or other date if interim appointment is made] and concludes on Dec. 31, [2025]. Thank you again for offering your time, talent and energy to this important initiative. If you have any questions, please do not hesitate to contact [insert local contact].

Sincerely,

[Name]

[Chair]

[Local workforce development board]

cc: [President/CEO, local workforce development board]  
[Senior staff responsible for maintaining consortium rosters]

# [Local Workforce Development Board] [NAME OF EDUCATION AND INDUSTRY CONSORTIUM] ROSTER

## GENERAL INFORMATION

Section 445.007 (15), Florida Statutes, requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated workforce service delivery area.

The chair of the local workforce development board shall appoint the consortium members. A member of a local workforce development board shall not serve as a member of the consortium. Consortium members shall be appointed for two-year terms beginning on Jan. 1 of the year of the appointment, and any vacancy on the consortium must be filled for the remainder of the unexpired term in the same manner as the original appointment.

The membership of the education and industry consortium must meet the following requirements:

### Industry Representative Requirements:

- Chief Executive Officers or presidents or other executive level staff from the top public and private employers in the local area.
- Industry representatives should reflect the priority industries in the local area.

### Education Representative Requirements:

- Superintendents, presidents, or other leadership staff from education institutions in the local area that represent both public and private education entities in:
  - K-12 education
  - District technical colleges
  - State colleges
  - Universities
  - Other degree or credential granting institutions in the local area

If a member of the education and industry consortium is unable to attend a meeting, a designee from the members' executive team may attend.

Chair of consortium: \_\_\_\_\_

Contact information: \_\_\_\_\_

Report prepared by: \_\_\_\_\_

Board contact: \_\_\_\_\_

Date: \_\_\_\_\_

CONSORTIUM ROSTER

NAME	TITLE	ORGANIZATION NAME	INDUSTRY (For Business Partners Only)	PHONE NUMBER	EMAIL ADDRESS	TERM START DATE	TERM END DATE	CONSORTIUM SEAT FILLED

NAME	TITLE	ORGANIZATION NAME	INDUSTRY (For Business Partners Only)	PHONE NUMBER	EMAIL ADRESS	TERM START DATE	TERM END DATE	CONSORTIUM SEAT FILLED

# [Local Workforce Development Board] [Name of EDUCATION AND INDUSTRY CONSORTIUM] QUARTERLY REPORT

## A. GENERAL INFORMATION

Report quarter: \_\_\_\_\_

Date of meeting: \_\_\_\_\_

Report prepared by: \_\_\_\_\_

Local workforce development board contact: \_\_\_\_\_ Date: \_\_\_\_\_

## B. ATTENDANCE

Name	Organization	Industry or Education Organization	Contact Information



Name	Organization	Industry or Education	Contact Information

## B. SUMMARY REPORT

1. Summary analysis of the local labor market based on the industry representative needs and education offerings. (Provide summary)
2. Information on priority industry sectors and occupations for the local area. (Provide summary)
3. Information on the status of existing talent pipelines for in-demand occupations. (Provide summary)



**POLICY  
NUMBER  
090**

## **Administrative Policy**

<b>Title:</b>	Eligible Training Providers List Requirements		
<b>Program:</b>	Workforce Innovation and Opportunity Act		
<b>Effective:</b>	3/1/2016	<b>Revised:</b>	TBD

### **I. PURPOSE AND SCOPE**

The purpose of this policy is to provide guidance to local workforce development boards (LWDBs) on the Eligible Training Provider List (ETPL) and related federal and state requirements, performance standards, data reporting, and procedures for determining initial and continued eligibility of training providers and programs of study.

### **II. BACKGROUND**

Workforce Innovation and Opportunity Act (WIOA) Title I training can be provided through a variety of contract mechanisms, or it may be funded through an Individual Training Account (ITA) that is used to purchase training from an Eligible Training Provider (ETP). ETPs are postsecondary providers of training services that are eligible to receive funds from LWDBs as prescribed in Section 133(b) of WIOA. The ETPL is mandated by Section 122 of WIOA, which requires the Governor, through the state workforce development board, CareerSource Florida, Inc., to establish criteria, information requirements, and procedures on the eligibility of training providers of training services in the state. Additionally, Florida's 2021 Reimagining Education and Career Help (REACH) Act charges the Florida Department of Commerce (FloridaCommerce) with establishing ETP criteria focused on participant outcomes.

The workforce development system established under WIOA emphasizes informed consumer choices, job-driven training, provider performance, and continuous improvement. The quality and selection of training providers and programs of study are vital to achieving these core principles.

### **III. AUTHORITY**

Workforce Innovation and Opportunity Act of 2014, Public Law 113-128

20 Code of Federal Regulations (CFR) 680.400 et seq., Subpart D – Eligible Training Providers

Training and Employment Guidance Letter (TEGL) No. 8-19 and TEGL No. 8-19, Change 1

TEGL No. 13-16

TEGL No. 3-18

TEGL No. 21-22

Section 445.003(7)(b), Florida Statutes (F.S.)

Section 445.004(4)(h), F.S.

Section 1005.21, F.S.

Section 1008.39, F.S.

### **IV. POLICIES AND PROCEDURES**

An ITA may be used to pay for any allowable type of training if the program of training services (also referred to as a “program of study”) is on the ETPL. ETPs are entities that are eligible to receive WIOA Title I-B funds for adult and dislocated worker participants who enroll in training programs, through ITAs. ITAs may also be used for WIOA Title I Youth funds to provide training to older, out-of-school youth, ages 18-24, and in-school youth, ages 16-21.

WIOA requires that each state ensure qualified providers offering a variety of job-driven training programs are available. A training provider must provide a program of study to be included on the ETPL.

#### **A. STATE AND LOCAL ETPL**

FloridaCommerce and the LWDBs must work together to identify ETPs to be included on the state ETPL. LWDBs must select approved training providers from the state ETPL. In addition to the criteria outlined in this policy, LWDBs may add additional requirements for training providers, except registered apprenticeship programs (RAPs), that supplement the criteria and information requirements for an ETP or program of study. This will result in training providers that are on the state

ETPL that may not be eligible for inclusion on the local ETPL; therefore, the local ETPL will be a subset of the state ETPL. LWDBs that do not establish additional requirements through local policy must include all state ETPs on its local ETPL. Note: All ETPs on a local ETPL must first be on the state ETPL.

State and local ETPLs must be maintained in the state's online labor exchange and case management system, Employ Florida. Also, LWDBs must make the state ETPL or their local ETPL, as appropriate, publicly available through their local websites.

## **B. PROVIDER AND PROGRAM ELIGIBILITY UNDER WIOA**

To be eligible to apply for inclusion on the ETPL and to receive training funds under WIOA Section 133(b), the training provider must be one of the following types of entities detailed in 20 CFR 680.410(d):

1. Institutions of higher education such as universities, colleges, or other public or private institutions of higher education that provide programs that lead to a recognized postsecondary credential.
2. RAPs.
3. Other public or private training providers, which may include community-based organizations and joint labor-management organizations.
4. Eligible providers of adult education and literacy activities under WIOA Title II, if these activities are provided in combination with training services as described in 20 CFR 680.350.

Additionally, LWDBs may be included on the ETPL if they meet the conditions of WIOA Section 107(g)(1), which states that authority may be permitted to LWDBs to provide training services pursuant to a request from the LWDB if the local board:

1. Submits a request or an application to FloridaCommerce for approval by the CareerSource Florida Board of Directors, which must include:
  - a. Satisfactory evidence that there is an insufficient number of eligible providers of such a program of training services to meet local demand in the local area;
  - b. Information demonstrating that the LWDB meets the requirements for an eligible provider of training services under WIOA Section 122; and
  - c. Information demonstrating that the program of training services prepares participants for an in-demand industry sector or occupation in the local area; and
2. Makes the proposed request or application available to eligible providers of training services and other interested members of the public for a public comment period of not less than 30 days.

### **C. PROGRAM OF STUDY**

A program of study is a course, class, or structured regimen that provides training leading to:

1. An industry-recognized postsecondary credential, a secondary school diploma, or equivalent;
2. Employment; or
3. Measurable skills gains leading to one of the above.

Training services may be delivered in person, online, or using a blended method or approach. Online training providers may apply and be considered for inclusion on the state and local ETPLs but are required to meet the same eligibility and performance criteria established for classroom-based instruction providers. Training programs must also be made physically and programmatically accessible for individuals who are employed and individuals with barriers to employment, such as persons with disabilities.

ETPs may offer programs of study that include:

1. Occupational skills training including training for non-traditional employment;
2. On-the-Job Training (OJT);
3. Incumbent Worker Training (IWT);
4. Programs that combine workplace training with related instruction, which may include cooperative education programs;
5. Private-sector training programs;
6. Skill upgrading and retraining;
7. Entrepreneurial training;
8. Job readiness training provided in combination with training services or transitional jobs;
9. Adult education and literacy activities, including activities of English language acquisition and integrated education and training programs, provided concurrently or in combination with services provided in the programs listed in numbers 1. through 7., above; and
10. Customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training.

### **D. INITIAL ELIGIBILITY (TRAINING PROVIDERS)**

Initial eligibility for the ETPL applies to all training providers except RAPs registered with the Florida Department of Education (DOE). The training provider must supply verifiable, program-specific performance information pursuant to the criteria established by federal regulations and state statutes under which the provider applies

to become an ETP. The information provided must support the training provider's ability to serve participants.

To meet initial eligibility to be included on the ETPL, a training provider must provide the following:

1. A description of the training or educational institution including the provider's address, email, Federal Employer Identification Number (FEIN), and the name of the contact person;
2. Verification the provider is licensed, certified and/or otherwise authorized under Florida law to provide training services (this applies to in-state and out-of-state providers);
3. A detailed description of each program of training services being submitted for initial eligibility determination;
4. Data supporting the cost of attendance (including, but not limited to, tuition and fees);
5. Verification that the program leads to a credential on the Master Credentials List (MCL) and information on any other associated MCL credentials which can be used as part of a sequence in an individual's career lattice;
6. Whether the provider has developed the training in partnership or collaboration with a business or industry (identifying the business or industry);
7. Identification of the in-demand industry sectors and occupations that best fit with the training program;
8. A description of prerequisites, skills, and knowledge required prior to the commencement of the training; and
9. Information related to WIOA performance indicators (employment, median earnings, credentials) other than measurable skills gains.

All eligibility determinations are made based on the review of required information, which must be submitted through the ETPL portal in Employ Florida, as outlined in **Section IV. I – ETPL Portal** of this policy.

Training providers seeking initial eligibility determinations should contact an LWDB in the local area or planning region in which they plan to operate. The LWDB will provide the training provider with guidance and assistance with the ETPL application process and requirements, as needed. The LWDB will review the application to ensure documentation requirements are met and notify the State ETPL Coordinator via email at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov) that a determination of initial eligibility request has been submitted. When conducting a preliminary review of training provider applications, the LWDB must do so using only the state's criteria. The LWDB should not apply any additional local requirements or criteria during the preliminary review process.

The State ETPL Coordinator will approve or deny the application and notify the training provider of the determination through Employ Florida or the training provider's preferred mode of communication as indicated in the application. If approved, the ETP will be added to the state ETPL.

Alternatively, training providers may directly contact the State ETPL Coordinator at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov) to request an initial eligibility determination. The State ETPL Coordinator will review the application to ensure that all documentation requirements are met. The State ETPL Coordinator will follow the aforementioned process for determining eligibility and providing notification to the training provider for approval or denial of the initial eligibility request.

Training providers and the programs of study that are approved will receive initial eligibility for one year and will be subject to the continued eligibility requirements subsequent to their initial eligibility period.

#### **E. INITIAL ELIGIBILITY (PROGRAMS OF STUDY)**

A training provider's request for an initial eligibility determination must be accompanied by a request for initial eligibility determination for at least one program of study. A training provider may request initial eligibility determinations for multiple programs of study, but each program of study is reviewed independently. When an ETP with continued eligibility for one or more programs of study requests that a new program of study be added to the ETPL, the new program of study will undergo an initial eligibility determination and may be approved or denied.

Training providers seeking initial eligibility for a program of study should contact an LWDB in the local area or planning region in which they plan to operate. The LWDB will provide the training provider with guidance and assistance with the ETPL application process and requirements, as needed. The LWDB will review the application to ensure documentation requirements are met and notify the State ETPL Coordinator via email at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov) that a determination of initial eligibility request for a program of study has been submitted.

All eligibility determinations are made based on the review of required information, which must be submitted through the ETPL portal in Employ Florida, as outlined in **Section IV. I – ETPL Portal** of this policy. The State ETPL Coordinator will approve or deny the program application and notify the training provider of the determination(s) through Employ Florida or the preferred mode of communication indicated in the application for initial eligibility.

Alternatively, training providers may directly contact the State ETPL Coordinator at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov) to request an initial eligibility determination for one or more programs of study. The State ETPL Coordinator will review the application to ensure that all documentation requirements are met. The State ETPL Coordinator will follow



the aforementioned process for determining eligibility and providing notification to the training provider for approval or denial of the initial eligibility request.

## **F. CONTINUED/SUBSEQUENT ELIGIBILITY**

After a training provider has completed the one-year initial eligibility period, the training provider is required to apply for continued eligibility and recertify their program(s) of study every two years to maintain their eligibility for the ETPL. This process requires submission of performance and cost information for each program of study listed on the state ETPL.

Applications for continued eligibility must be submitted three months prior to the end of their current eligibility period. Training providers applying for continued eligibility of programs of study must log in to the ETPL portal to review and update all required fields and forms for each program of study for which continued eligibility is being sought. If the LWDB is assisting the training provider with their subsequent eligibility, the LWDB will review the program application to ensure all documentation requirements are met and notify the State ETPL Coordinator that a continuing eligibility request has been submitted for the program(s) of study. The State ETPL Coordinator will review all information provided and notify the LWDB and the provider of approval or denial through Employ Florida or the preferred mode of communication outlined in the application.

Each training provider seeking continued eligibility must supply the following information as required by 20 CFR 680.410:

1. Verification the provider is licensed, certified, or otherwise authorized under Florida law (if applicable) to be a provider of training services. This requirement applies to in-state and out-of-state providers.
2. Information reported to state agencies on federal and state training programs other than WIOA Title I-B programs as listed below:
  - a. The total number of persons enrolled in the program;
  - b. The total number of WIOA participants enrolled in the program;
  - c. The total number of persons completing the program;
  - d. The total number of WIOA participants completing the program;
  - e. Quality<sup>1</sup> of the program of study including a program that leads to a recognized postsecondary credential;
  - f. Provider's ability to offer industry-recognized certificates and credentials;
  - g. The total number of persons awarded a Recognized Postsecondary Credential (or other credential, if applicable);

<sup>1</sup> Florida defines quality as training programs that meet the minimum criteria as defined in this policy as well as programs that develop skills valued by priority industry sectors.

- h. The total number of WIOA participants awarded a Recognized Postsecondary Credential (or other credential, if applicable);
- i. The total number of persons employed after completing the program;
- j. The total number of WIOA participants employed after completing the program;
- k. Data identifying the cost of attendance and costs of tuition and fees for WIOA participants completing the program;
- l. Information on recognized postsecondary credentials (or other credential, if applicable) received by WIOA participants;
- m. Whether the credential can be used in conjunction with other credentials as part of a sequence to move an individual along a career pathway or up a career ladder;
- n. Description of how the provider will ensure access to programs of study throughout the state, including in rural areas, and using technology (as applicable);
- o. Description of provider's ability to provide trainings that are physically and programmatically accessible for individuals who are employed and individuals with barriers to employment, including individuals with disabilities;
- p. Information reported to state agencies with respect to federal and state programs of study (other than the program carried out under WIOA), including one-stop partner programs;
- q. Performance on WIOA performance indicators;
- r. The degree to which programs of study relate to in-demand industry sectors and occupations in the state;
- s. Timeliness and accuracy of ETP's performance reports; and
- t. Any additional factors that are determined appropriate within the parameters of WIOA and statutes.

## **G. REGISTERED APPRENTICESHIP PROGRAMS**

In accordance with the National Apprenticeship Act (NAA) (50 Stat. 664, chapter 663; 29 U.S.C. 50 et seq.), entities that carry out RAPs are exempt from the initial and continued eligibility requirements described in this policy. RAPs must be included and maintained on the ETPL until:

- 1. The RAP notifies FloridaCommerce it no longer wants to be included on the list;
- 2. The program becomes deregistered under the National Apprenticeship Act;
- 3. The program is determined to have intentionally supplied inaccurate information; or
- 4. A determination is made by FloridaCommerce that the RAP substantially violated any provision of Title I of WIOA or the WIOA regulations, including 29 CFR part 38.

Because RAPs are exempt from all initial and continued eligibility requirements, the LWDBs may not impose additional criteria or information requirements for RAP sponsors except as outlined in Training and Employment Guidance Letter Nos. 08-19 and 08-19, Change 1, and TEGL No. 13-16, Change 1.

A RAP is an ETP if it is registered with DOE, Office of Apprenticeship (OA), or any other state's State Apprenticeship Agency (SAA). Although they are automatically eligible for ETPL inclusion, RAP sponsors seeking to have their apprenticeship programs listed on the ETPL must still "opt-in" by informing the State ETPL Coordinator at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov). RAPs opting-in may be referred to the State ETPL Coordinator by CareerSource Florida, LWDBs, or DOE. If a RAP expresses interest in being on the state ETPL, the ETPL Coordinator must request the RAPs provide the following information:

1. Occupations included in the RAP;
2. The name and address of the RAP sponsor;
3. The name and address of the Related Technical Instruction provider and the location of instruction if different from the program sponsor's address;
4. The method and length of instruction; and
5. The number of active apprentices.

RAPs on the state ETPL must be included on all local ETPLs in the state and shall remain on the ETPLs until removed or upon written request for removal by the RAP sponsor to the ETPL Coordinator at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov).

FloridaCommerce will regularly coordinate with USDOL, CareerSource Florida and DOE to ensure that necessary updates are made to any information previously provided by RAP sponsors or training providers. FloridaCommerce will also coordinate with DOE to ensure that RAPs registered with the DOE are made aware that they are eligible for placement on the ETPL, and that DOE is informed when a RAP that is registered with USDOL's OA or another state's SAA contacts FloridaCommerce to opt-in to inclusion on the ETPL.

Apprenticeship programs that are not registered with DOE, OA, or another state's SAA are not considered RAPs and must complete the initial eligibility and continued eligibility procedures. Pre-apprenticeships, including quality registered pre-apprenticeships leading to RAPs, are not automatically approved for inclusion on the ETPL and are not exempt from requirements outlined in this policy. Other programs of training services offered by a RAP sponsor or a RAP's provider of related instruction are likewise not automatically eligible.

## **H. OUT-OF-LOCAL-AREA AND OUT-OF-STATE PROVIDERS**

State policies and procedures may provide for reciprocal or other agreements established with another state to permit the use of ITAs for ETPs in another state. As

such, participants may choose ETPs and programs of study located outside of the state or local area if the program is on the state's ETPL and in accordance with state and local area policies.

Out-of-state postsecondary training institutions that are not operating in Florida are not required to be licensed by the Florida Commission for Independent Education (CIE). However, out-of-state providers must provide the following information:

1. Information needed for initial eligibility or continuing eligibility determination;
2. Evidence that the institution (and applicable programs) is accredited by an accreditation agency approved by the U.S. Department of Education;
3. Evidence that the institution meets the licensing requirements of its home state; and
4. Evidence that the institution is identified as active on the ETPL in its state of origin or native state. To provide performance information for its programs, out-of-state providers are required to report their student completion data to FloridaCommerce under established reporting mechanisms.

Out-of-local area and out-of-state training providers must request an initial eligibility determination for each program of study to be included on the state ETPL. Out-of-state providers must also provide documentation, uploaded to the ETPL portal, which validates the above-referenced criteria. These training providers must contact the state ETPL Coordinator directly to request their initial eligibility and the initial eligibility of their programs of study.

## **I. ETPL Portal**

The state ETPL is managed by FloridaCommerce and maintained in Employ Florida, the state's online labor exchange and case management system. Employ Florida connects employers and job seekers and provides information about training opportunities available in the state, including training program services eligible for funding under WIOA Section 133(b).

The ETPL portal is the platform used to maintain ETPLs and record consumer information, including, but not limited to, cost and performance information for each approved program of study. The ETPL portal is the mechanism used by FloridaCommerce to manage the ETPL process, and by LWDBs and training providers to apply for initial eligibility and re-apply for continued eligibility.

The ETPL portal supports WIOA participants in making informed choices about ETPs and programs of study and allows FloridaCommerce to disseminate state and local ETPLs to employers, training providers, workforce staff, One-Stop career center partners, and the public, including individuals with disabilities and individuals with limited English proficiency. Consumer choice is ensured by making the state and

local ETPLs, accompanied by performance and cost information, widely available and easily accessible. ETPLs must be disseminated in a format that facilitates comparison between programs of study and is searchable, user-friendly, and easily understood by individuals seeking information on training outcomes.

#### **J. PERFORMANCE CRITERIA**

As required by Section 445.003(7)(b), F.S., FloridaCommerce must establish the minimum criteria a training provider must achieve for completion, earnings, and employment rates of eligible participants. Once criteria are established, training providers will be required to meet at least two of the minimum criteria for subsequent eligibility.

Like the RAP exemption from the eligibility requirements, RAPs also are exempt from ETP performance reporting requirements in WIOA Sections 116(d)(4) and 122, including any additional ETP reporting requirements that have been added by the state or local area.

#### **K. ANNUAL REPORTING**

No later than Aug. 31 of each year, training providers must upload information into the ETPL portal on all enrolled and completer individuals for each program of study being considered for continued eligibility. This student data must be submitted each year for each program of study and must include the social security numbers for each enrolled and completer individual to allow for the calculation of minimum performance levels as required in 20 CFR 680.460(g).

The ETPL portal provides a secure solution for the transmission of Personally Identifiable Information (PII). ETPs, excluding RAP sponsors, must upload student data including the social security numbers and completed training of all individuals enrolled during a specific timeframe as determined by policy. Any transmission of PII shall occur in accordance with FloridaCommerce security policies and any disclosure of PII from an education record must be carried out in accordance with the Family Education Rights and Privacy Act (FERPA), including provisions related to prior written consent. As allowed pursuant to 34 CFR 99.31, DOE has designated FloridaCommerce as an authorized representative to enforce or comply with federal legal requirements relating to WIOA.

#### **L. DENIAL, DEACTIVATION, REMOVAL, OR LOSS OF PROVIDER OR PROGRAM ELIGIBILITY**

There are circumstances under which training providers may be denied, deactivated, removed, or lose their eligibility for inclusion on the state ETPL, as outlined below. Prior to approving an ITA for a WIOA-eligible individual, LWDBs must ensure that

training providers and program of study are, or continue to be, included on the ETPL at the time the participant is enrolled in the program of study.

### **(1) Denial**

A program of study that FloridaCommerce determines does not meet the eligibility requirements shall be issued a denial notice within 30 calendar days of FloridaCommerce's receipt of the application. A separate denial notice will be issued for each program of study being denied and will include the reason(s) for denial and provide appeal rights, as applicable.

### **(2) Deactivation**

Once an ETP or program of study is approved, it will remain on the state's ETPL through the continued eligibility period of two years unless removed by FloridaCommerce for documented training provider and/or program of study violations. Training providers or programs of study are subject to deactivation and removal from the ETPL if:

1. FloridaCommerce determines the training provider intentionally supplied inaccurate information or substantially violated any provision of Title I of WIOA regulations, including 29 CFR Part 38;
2. The program of study fails to meet the states' minimum performance levels as required in 20 CFR 680.460(g); or
3. The training provider loses its license or accreditation from its accrediting body.

### **(3) Loss of Eligibility and Removal**

A program of study may be removed from the state ETPL if:

1. The training provider fails to supply participant data required for the performance review by the annual due date of Aug. 31.
2. It is determined that the training provider intentionally supplied inaccurate information or substantially violated any provisions of Title I of WIOA or the WIOA regulations, including 29 CFR part 38.
3. It is determined that the provider is engaging in fraud or other criminal acts, incapacity, unfitness, neglect of duty, official incompetence, irresponsibility, misfeasance, malfeasance, gross mismanagement, waste, nonfeasance, or lack of performance.

FloridaCommerce will electronically send a notice of removal from the ETPL to the LWDBs and to the training provider. LWDBs must not issue a participant an ITA for a training provider/program of study that is determined to have lost eligibility for inclusion on the ETPL. If WIOA participants are already enrolled

and have received an ITA for a training provider/program of study that subsequently becomes deactivated or removed from the ETPL, LWDBs may allow enrolled participants to complete the training program; however, no new enrollments may occur. LWDBs must develop local operating procedures to ensure no enrollments are made after the effective date of the notice of removal. Procedures should also include how any existing participants who are enrolled in the program of study will be handled.

#### **(4) Re-application**

Training providers may reapply under the initial eligibility criteria provided in this policy.

### **M. APPEALS**

For an appeal of any decision made at the state level, the appellant shall follow the appeals procedure established by FloridaCommerce. For an appeal of any decision made by an LWDB, the appellant shall follow the appeals procedure established in its local plan by the LWDB making the decision.

### **N. ETPL AND NON-ITA TRAINING SERVICES**

There are exceptions to the required use of the ETPL for ITA-funded training by LWDBs. In the following situations covered by these exceptions, a contract for services between the LWDB and the training provider may be attained and implemented to ensure services are provided instead of selecting a training provider from the state ETPL.

#### **(1) Work-Based Training**

WIOA supports training and work experience for job seekers through work-based training, which is coordinated by LWDBs through collaboration with local employers. These activities, like OJT, Customized Training, and IWT do not require inclusion on the ETPL, in accordance with 20 CFR 680.530. Please see [Administrative Policy 100](#) for additional information on work-based training.

#### **(2) Training Contracts**

A program of study may be provided through training contracts instead of ITAs when there is not sufficient availability of eligible training providers in the local area to accomplish the purpose of an ITA. These contracts may be used for cohort training, per TEGL 21-22, Attachment 1, or in one of the other situations prescribed in 20 CFR 680.320. Because training contracts do not use ITAs, the training provider is not required to be included on the state or local ETPL. The LWDB must have written procedures in place that describe how such a

determination is made and the process for contracting with the training provider(s).

### **(3) Non-WIOA**

The ETPL is a requirement of WIOA and only applies to programs that are supported by WIOA funding. Providers of training services that do not intend to seek WIOA funding do not need to request or pursue ETPL inclusion.

## **V. DEFINITIONS**

- 1. Continued Eligibility:** “Continued Eligibility” or “Subsequent Eligibility” is the eligibility determination that allows training providers to remain on the ETPL until the next eligibility determination.
- 2. Credential:** A WIOA indicator consisting of a recognized postsecondary credential (an industry-recognized certificate or certification, a certificate of completion of an apprenticeship, a license recognized by the state involved or federal government, or an associate or baccalaureate degree) or a secondary school diploma, or its recognized equivalent, during participation in or within one year after exit from the program. All credentials must be included on the Master Credentials List and a credential’s inclusion on the Master Credentials List is sufficient to meet the WIOA definition of “credential.”
- 3. Eligible Training Provider (ETP):** A provider of training services or programs of study (as prescribed in 20 CFR 680.410) that has met the eligibility requirements to receive WIOA funds for providing training service programs to eligible individuals.
- 4. Eligible Training Provider List (ETPL):** A statewide or local compilation of ETPs (as prescribed in 20 CFR 680.410) and approved programs of training services or programs of study (as prescribed in 20 CFR 680.420).
- 5. Individual Training Account (ITA):** A payment agreement with an ETP established on behalf of a WIOA participant for a program of training services or programs of study as prescribed in WIOA section 134(c)(3).
- 6. Initial Eligibility:** The initial determination that allows a training provider and approved program of training services or programs of study onto the state or local ETPL for the first year. An established ETP may also request an initial eligibility determination for a new program of study.
- 7. Local ETPL:** A subset of the state ETPL created when LWDBs establish, through local policy, additional requirements for ETPs and programs of study. All ETPs on a local ETPL are also on the state ETPL, maintained in Employ Florida.



- 8. Master Credentials List (MCL):** Required by the Reimagining Education and Career Help (REACH) Act, the Master Credentials List is a comprehensive list of state-approved degree and non-degree credentials of value that prepare Floridians for in-demand occupations. Credentials on the list satisfy the criteria set forth by the Florida Credentials Review Committee in the Framework of Quality. Programs of study must be on the MCL to be on the state ETPL.
- 9. Personally Identifiable Information (PII):** Information used to distinguish or trace an individual's identity, either alone or when combined with other personal or identifying information, linked or linkable to a specific individual.
- 10. Program of Training Services:** A "Program of Training Services" or "Program of Study" as prescribed in 20 CFR 680.420. Such a program consists of one or more courses or classes, or a structured regimen, leading to one or more of the following: A recognized postsecondary credential, secondary school diploma or its equivalent; employment; or a measurable skills gain toward such a credential or employment.
- 11. Registered Apprenticeship Program (RAP):** A program that is registered with the USDOL Office of Apprenticeship (OA) or any State Apprenticeship Agency (SSA) as prescribed in 20 CFR 680.470(a). Florida's State Apprenticeship Agency is the Florida Department of Education's Office of Apprenticeship.
- 12. Sponsor (of a Registered Apprenticeship Program):** Any person, association, committee, or organization operating an apprenticeship program and in whose name the program is (or is to be) registered or approved.
- 13. State ETPL:** A list of all Eligible Training Providers and Programs who have been approved to receive WIOA funding through ITAs. It is maintained by FloridaCommerce within the state's ETPL MIS portal.
- 14. Training Provider:** A university, college, public or private technical or vocational training institution, a private training company or private instructor, or a company employee who is qualified to provide instruction that leads to a recognized postsecondary credential, license, secondary school diploma or equivalent.

## VI. REVISION HISTORY

Date	Description
3/1/2016	Policy issued by the Florida Department of Economic Opportunity.
TBD	Revised by FloridaCommerce to align with TEGF No. 08-19. Approved by the CareerSource Florida Board of Directors.



## BOARD MEETING AGENDA

**REVISED 9-26-2023**

**Wednesday, September 27, 2023 – 11:30 a.m.  
College of Central Florida – Levy Campus  
15390 US-19, Chiefland, FL 32626**

**Join Zoom Meeting: <https://us02web.zoom.us/j/88984262657>  
Conference Line: 1 646 558 8656 Meeting ID: 889 8426 2657**

Call to Order		D. Goddard
Invocation and Pledge of Allegiance		R. Stermer
Roll Call		C. Schnettler
Public Comment		D. Goddard
Approval of Minutes, June 7, 2023	Pages 3 - 56	D. Goddard
Introduction of New Members		D. Goddard

### **PRESENTATION**

Regional Planning	Pages 57 - 150	J. Shapiro
One Stop Operator		T. Waterson / K. Barry

### **DISCUSSION ITEMS**

State Update	Pages 151 - 180	R. Skinner
Workforce Issues that are Important to our Community		R. Skinner

### **ACTION ITEMS**

2023/2024 Budget	Pages 181 – 182	D. French
Regional Planning	Page 183	R. Skinner
Broadband Grant	Pages 184 – 186	D. French
Broadband Grant Subrecipients	Page 187	D. French

### **CONSENT AGENDA**

<u>Performance and Monitoring – 8/15/2023</u>	Page 188	J. Chang
Independent Monitoring Contract		

<u>Business and Economic Development – 8/16/2023</u>		P. Beasley
No Action Items		

<u>Career Center – 8/24/2023</u>		C. Harris
No Action Items		

### **OUR VISION STATEMENT**

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



Nominating Committee – 8/28/2023  
Appointment of Vice-Chair

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K. Baxley

Marketing and Outreach – 8/30/2023  
No Action Items

C. Flanagan

Executive Committee – 9/13/2023  
Severance Pay  
Summit Sponsorship  
Independent Monitoring Contract  
ITA waiver  
Dislocated Worker Fund Transfer  
Final Budget  
Disaster Response Funding

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B. Whiteman /  
R. Skinner

**PROJECT UPDATES**

None

**MATTERS FROM THE FLOOR**

**ADJOURNMENT**

**LUNCH**

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