



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

Page 189

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

Pages 190 - 194

B. Whiteman /
R. Skinner

PROJECT UPDATES

None

MATTERS FROM THE FLOOR

ADJOURNMENT

LUNCH

OUR VISION STATEMENT

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



CAREERSOURCE CITRUS LEVY MARION BOARD MEETING

MINUTES

DATE: June 7, 2023
PLACE: College of Central Florida, Marion Campus
TIME: 11:30 a.m.

MEMBERS PRESENT

Albert Jones
Arno Proctor
Ben Whitehouse
Charles Harris
Debra Stanley
Fred Morgan
Jeff Chang
John Murphy
Jorge Martinez
Judy Houlios
Kathy Judkins
Kevin Cunningham
Lanny Mathis
Mark Paugh
Pat Reddish
Pete Beasley
Tanya Taylor
Theresa Flick

MEMBERS ABSENT

Brandon Whiteman
Angie White
Carl Flanagan
Darlene Goddard
Equilla Wheeler
John Hemken
Joyce Wilson
Kimberly Baxley
Lewrissa Johns
Ted Knight

OTHER ATTENDEES

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

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

CALL TO ORDER

The meeting was called to order by Fred Morgan, Treasurer, at 11:31 a.m.

ROLL CALL

Cira Schnettler called roll and a quorum was declared present.

PUBLIC COMMENT

There were no public comments.

APPROVAL OF MINUTES

Kathy Judkins made a motion to approve the minutes from the March 8, 2023, meeting. Charles Harris seconded the motion. Motion carried.

PRESENTATION

DEO Annual Performance Review

Rusty Skinner explained that DEO provided the draft of the presentation late Monday afternoon. The presentation contained inaccurate information and will need a thorough review. The presentation has been moved to September.

RELATED PARTIES CONTRACT APPROVALS 2023-2024

Master Contracts Requiring 2/3rds Vote

1. Citrus County Chamber of Commerce
Deb Stanley made a motion to approve the Citrus County Chamber of Commerce contract. Kevin Cunningham, and John Murphy abstained due to a conflict. Carl Flanagan disclosed a conflict but was not present to abstain. Mark Paugh seconded the motion. Motion carried.
2. Levy County Schools
Kathy Judkins made a motion to approve the Levy County Schools contract. Tanya Taylor abstained due to a conflict. Charles Harris seconded the motion. Motion carried.
3. College of Central Florida
John Murphy made a motion to approve the College of Central Florida contract. Mark Paugh abstained due to a conflict. Deb Stanley seconded the motion. Motion carried.
4. Marion County School Board
Kathy Judkins made a motion to approve the Marion County School Board contract. Ben Whitehouse abstained due to a conflict. Pat Reddish seconded the motion. Motion carried.

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

5. Ancorp
Charles Harris made a motion to approve the Ancorp contract. Arno Proctor abstained due to a conflict. Pat Reddish seconded the motion. Motion carried.
6. Key Training Center
Mark Paugh made a motion to approve the Key Training Center contract. Theresa Flick abstained due to a conflict. Kathy Judkins seconded the motion. Motion carried.
7. A & M Manufacturing
John Murphy made a motion to approve the A & M Manufacturing contract. John Hemken disclosed a conflict but was not present to abstain. Pat Reddish seconded the motion. Motion carried.
8. Ocala Housing Authority
Charles Harris made a motion to approve the Ocala Housing Authority contract. Judy Houlios abstained due to a conflict. Kathy Judkins seconded the motion. Motion carried.

Contracts Not Requiring 2/3rds Vote – No Conflicts

9. Ocala Metro Chamber and Economic Partnership
10. Eckerd Connects
11. Powell and Jones – Joint Auditing
12. Powell and Jones – Subrecipient Monitoring
13. CD Staffing
14. Region 6 Financial Services Agreement
15. Castle Branch

Ben Whitehouse made a motion to approve all other contracts. Mark Paugh seconded the motion. Motion carried.

DISCUSSION ITEMS

State Update

Rusty Skinner provided the following updates:

- The regional directors met with CareerSource Florida and DEO on May 24 and then CareerSource Florida hosted their board meeting on June 6 and 7. Several topics were discussed during both meetings:
 - System Improvements – There was discussion on how EmployFlorida is not user friendly, full registration is a lengthy process, and self-referrals do not add to the region's goals. These issues are under consideration for improvements.
 - Statewide Pricing – By obtaining improved pricing options for various items, the State has the potential to ensure consistent pricing that benefits all regions.
 - Department of Commerce – DEO will transition to the new title of Department of Commerce. Enterprise Florida will be absorbed through this new entity.
 - Budget – All regional budgets were approved at the CareerSource Florida meeting. Our allocation will stay as a 11% reduction.

Workforce Transition

Rusty Skinner explained that the map provided in the packet was suggested as an initial reference for discussion. The team appeared receptive to receiving input from the regions regarding potential locations and methods for regional collaboration. Along with local metrics there will be regional performance metrics. We will be hearing more on this in the upcoming months and how plans are moving forward.

Workforce Issues that are Important to our Community

There were no discussion items.

Financial Disclosure Forms / Annual Conflicts Reminder

Rusty Skinner reminded the board members of filing their financial disclosures by July 1 to avoid penalties.

ACTION ITEMS

2023/2024 Budget

Dale French reviewed the proposed preliminary budget. A decrease in funding was anticipated and overall, there is 11% reduction. John Murphy asked if operational expenses were being reviewed for efficiencies. Rusty Skinner explained that the lease for the current administrative office space at the College of Central Florida ends June 30, 2024. There is available space at the 14th Street Career Center. Administrative staff

would move to the 14th Street office resulting in significant savings in the next program year. Ben Whitehouse made a motion to approve the preliminary 2023-2024 budget. Kathy Judkins seconded the motion. Motion carried.

FWDA Dues

Mark Paugh made a motion to approve paying the FWDA dues out of unrestricted funds. Kathy Judkins seconded the motion. Motion carried.

CONSENT AGENDA

CEO Contract Review- 5-22-2023, 5/31/2023

CEO Contract Renewal

Attorney Bob Stermer stated that Rusty Skinner requested that his salary remain the same for the upcoming program year. He will receive the 3.5% one-time retention incentive that all staff may receive after the budget is finalized. Kathy Judkins made a motion to approve Rusty Skinner's 2023-2024 contract and retention incentive. Charles Harris seconded the motion. Motion carried.

Performance and Monitoring – 5/9/2023

Youth Build Monitoring Report

Committee Chair Jeff Chang provided a summary of the committee activities.

Business and Economic Development – 5/10/2023

No Action Items

Committee Chair Pete Beasley provided a summary of the committee activities.

Career Center – 5/18/2023

Training Provider Approvals

One Stop Operator Contract Approval (Documented under Executive)

Broadband Grant

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

Marketing and Outreach – 5/24/2023

Top Workplaces

In the absence of Committee Chair Carl Flanagan, Laura Byrnes provided a summary of the committee activities.

Executive Committee – 4/10/2023, 5/31/2023

Area Recertification

Direct Service Provider

Training Provider Approval

Gray Robinson Contract Extension

By-Laws Amendment - Term Limits

Bank Statement Reconciliation Policy

Educational Assistance Policy

Teleflex Policy

Emergency Paid Sick Leave

One Stop Operator

Annual Healthcare Renewal
Schedule of Operations
Regional Planning
Independent Monitoring RFP
Workforce Champion
990
Retention Incentives
Severance Pay

Rusty Skinner provided a summary of the committee activities.

Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.

PUBLIC COMMENT

PROJECT UPDATES

None

MATTERS FROM THE FLOOR

None

ADJOURNMENT

There being no further business, the meeting adjourned at 12:30 p.m.

APPROVED:

CareerSource CLM - All Contracts July 1, 2023 - June 30, 2024

Item #	Contractor	Purpose/Scope of Work Summary	Funding	Board Action	Contractor / SubContractor	Conflicts
		Master Contracts Requiring 2/3rds Vote				
1	Citrus County Chamber of Commerce	Employer outreach and job development services	\$ 20,000.00		C	John Murphy, Carl Flanagan, Kevin Cunningham
2	Levy County Schools	Training services and facility usage and rental fees. Cost is an average based on prior year usage. This is a blanket approval but to not exceed.	\$ 10,000.00		C	Tanya Taylor
3	College of Central Florida	Staff training services and facility usage and rental fees. This is a blanket approval but to not exceed. Have been determined to be contractor services and not subrecipients for the purpose of providing goods or services. Cost is an average based on prior year usage.	\$ 400,000.00		C	Mark Paugh
4	Marion County School Board	Staff training services and facility usage and rental fees. Cost is an average based on prior year usage. This is a blanket approval but to not exceed. Primary location for services is at MTC.	\$ 50,000.00		C	Ben Whitehouse
		Master Contracts Requiring 2/3rds Vote - OJT, CBT, or Apprenticeship Training Opportunities				
5	ANCORP	CBT and/or OJT Training Services - approval but to not exceed	\$ 20,000.00		C	Arno Proctor
6	Key Training Center	CBT and/or OJT Training Services - approval but to not exceed	\$ 20,000.00		C	Theresa Flick
7	A&M Manufacturing	CBT and/or OJT Training Services - approval but to not exceed	\$ 20,000.00		C	John Hemken
8	Ocala Housing Authority	CBT and/or OJT Training Services - approval but to not exceed	\$ 20,000.00		C	Judy Houlios
		Contracts Not Requiring 2/3rds Vote				
9	Ocala Metro Chamber & Economic Partnership (CEP)	Employer outreach and job development services. Have been determined to be contractor for services and not subrecipients for the purpose of providing goods or services.	\$ 30,000.00		C	
10	Eckerd Connects	WIOA youth services provider, supportive services costs providing services to youth in all three counties	\$ 1,196,555.00		S	
11	Powell and Jones	Joint auditing (Financial)	\$ 16,500.00		C	
12	Powell and Jones	Subrecipient monitoring	\$ 3,800.00		C	
13	CD Staffing	Payroll for PWE/PWI agreements	30% Mark up		C	
14	Region 6	Financial Services Agreement	\$ 55,000.00		C	
15	Castle Branch	Background Checks	\$25.10 per check		C	



RECORD OF ACTION/APPROVAL

Board Meeting Tuesday, June 7, 2023

TOPIC/ISSUE:

Approval of 2023-2024 contracts

BACKGROUND:

POINTS OF CONSIDERATION:

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

STAFF RECOMMENDATIONS:

COMMITTEE ACTION:

BOARD ACTION:

Master Contracts Requiring 2/3rds Vote

1. Citrus County Chamber of Commerce
Deb Stanley made a motion to approve the Citrus County Chamber of Commerce contract. Kevin Cunningham, and John Murphy abstained due to a conflict. Carl Flanagan disclosed a conflict but was not present to abstain. Mark Paugh seconded the motion. Motion carried.
2. Levy County Schools
Kathy Judkins made a motion to approve the Levy County Schools contract. Tanya Taylor abstained due to a conflict. Charles Harris seconded the motion. Motion carried.
3. College of Central Florida
John Murphy made a motion to approve the College of Central Florida contract. Mark Paugh abstained due to a conflict. Deb Stanley seconded the motion. Motion carried.
4. Marion County School Board
Kathy Judkins made a motion to approve the Marion County School Board contract. Ben Whitehouse abstained due to a conflict. Pat Reddish seconded the motion. Motion carried.

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

5. Ancorp

Charles Harris made a motion to approve the Ancorp contract. Arno Proctor abstained due to a conflict. Pat Reddish seconded the motion. Motion carried.

6. Key Training Center

Mark Paugh made a motion to approve the Key Training Center contract. Theresa Flick abstained due to a conflict. Kathy Judkins seconded the motion. Motion carried.

7. A & M Manufacturing

John Murphy made a motion to approve the A & M Manufacturing contract. John Hemken disclosed a conflict but was not present to abstain. Pat Reddish seconded the motion. Motion carried.

8. Ocala Housing Authority

Charles Harris made a motion to approve the Ocala Housing Authority contract. Judy Houlios abstained due to a conflict. Kathy Judkins seconded the motion. Motion carried.

Contracts Not Requiring 2/3rds Vote – No Conflicts

9. Ocala Metro Chamber and Economic Partnership

10. Eckerd Connects

11. Powell and Jones – Joint Auditing

12. Powell and Jones – Subrecipient Monitoring

13. CD Staffing

14. Region 6 Financial Services Agreement

15. Castle Branch

Ben Whitehouse made a motion to approve all other contracts. Mark Paugh seconded the motion. Motion carried.

FORM 8B MEMORANDUM OF VOTING CONFLICT FOR COUNTY, MUNICIPAL, AND OTHER LOCAL PUBLIC OFFICERS

LAST NAME—FIRST NAME—MIDDLE NAME Proctor Arno E.	NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE Citrus Levy Marion Reg. Workforce Dev. Board(CareerSource)
MAILING ADDRESS 5393 SW 86th Place	THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
CITY Ocala	COUNTY Marion
DATE ON WHICH VOTE OCCURRED 6/7/2023	NAME OF POLITICAL SUBDIVISION: MY POSITION IS: <input type="checkbox"/> ELECTIVE <input checked="" type="checkbox"/> APPOINTIVE

WHO MUST FILE FORM 8B

This form is for use by any person serving at the county, city, or other local level of government on an appointed or elected board, council, commission, authority, or committee. It applies to members of advisory and non-advisory bodies who are presented with a voting conflict of interest under Section 112.3143, Florida Statutes.

Your responsibilities under the law when faced with voting on a measure in which you have a conflict of interest will vary greatly depending on whether you hold an elective or appointive position. For this reason, please pay close attention to the instructions on this form before completing and filing the form.

INSTRUCTIONS FOR COMPLIANCE WITH SECTION 112.3143, FLORIDA STATUTES

A person holding elective or appointive county, municipal, or other local public office **MUST ABSTAIN** from voting on a measure which would inure to his or her special private gain or loss. Each elected or appointed local officer also **MUST ABSTAIN** from knowingly voting on a measure which would inure to the special gain or loss of a principal (other than a government agency) by whom he or she is retained (including the parent, subsidiary, or sibling organization of a principal by which he or she is retained); to the special private gain or loss of a relative; or to the special private gain or loss of a business associate. Commissioners of community redevelopment agencies (CRAs) under Sec. 163.356 or 163.357, F.S., and officers of independent special tax districts elected on a one-acre, one-vote basis are not prohibited from voting in that capacity.

For purposes of this law, a "relative" includes only the officer's father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, and daughter-in-law. A "business associate" means any person or entity engaged in or carrying on a business enterprise with the officer as a partner, joint venturer, coowner of property, or corporate shareholder (where the shares of the corporation are not listed on any national or regional stock exchange).

* * * * *

ELECTED OFFICERS:

In addition to abstaining from voting in the situations described above, you must disclose the conflict:

PRIOR TO THE VOTE BEING TAKEN by publicly stating to the assembly the nature of your interest in the measure on which you are abstaining from voting; *and*

WITHIN 15 DAYS AFTER THE VOTE OCCURS by completing and filing this form with the person responsible for recording the minutes of the meeting, who should incorporate the form in the minutes.

* * * * *

APPOINTED OFFICERS:

Although you must abstain from voting in the situations described above, you are not prohibited by Section 112.3143 from otherwise participating in these matters. However, you must disclose the nature of the conflict before making any attempt to influence the decision, whether orally or in writing and whether made by you or at your direction.

IF YOU INTEND TO MAKE ANY ATTEMPT TO INFLUENCE THE DECISION PRIOR TO THE MEETING AT WHICH THE VOTE WILL BE TAKEN:

- You must complete and file this form (before making any attempt to influence the decision) with the person responsible for recording the minutes of the meeting, who will incorporate the form in the minutes. (Continued on page 2)

APPOINTED OFFICERS (continued)

- A copy of the form must be provided immediately to the other members of the agency.
- The form must be read publicly at the next meeting after the form is filed.

IF YOU MAKE NO ATTEMPT TO INFLUENCE THE DECISION EXCEPT BY DISCUSSION AT THE MEETING:

- You must disclose orally the nature of your conflict in the measure before participating.
- You must complete the form and file it within 15 days after the vote occurs with the person responsible for recording the minutes of the meeting, who must incorporate the form in the minutes. A copy of the form must be provided immediately to the other members of the agency, and the form must be read publicly at the next meeting after the form is filed.

DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, Arno Proctor, hereby disclose that on June 7, 20 23 :

(a) A measure came or will come before my agency which (check one or more)

- ☐ inured to my special private gain or loss;
- ☐ inured to the special gain or loss of my business associate, _____ ;
- ☐ inured to the special gain or loss of my relative, _____ ;
- aep ☒ inured to the special gain or loss of ANCORP, by _____ , by whom I am retained; or
- ☐ inured to the special gain or loss of _____ , which is the parent subsidiary, or sibling organization or subsidiary of a principal which has retained me.

(b) The measure before my agency and the nature of my conflicting interest in the measure is as follows:

If disclosure of specific information would violate confidentiality or privilege pursuant to law or rules governing attorneys, a public officer, who is also an attorney, may comply with the disclosure requirements of this section by disclosing the nature of the interest in such a way as to provide the public with notice of the conflict.

6/7/2023

Date Filed

Signature

NOTICE: UNDER PROVISIONS OF FLORIDA STATUTES §112.317, A FAILURE TO MAKE ANY REQUIRED DISCLOSURE CONSTITUTES GROUNDS FOR AND MAY BE PUNISHED BY ONE OR MORE OF THE FOLLOWING: IMPEACHMENT, REMOVAL OR SUSPENSION FROM OFFICE OR EMPLOYMENT, DEMOTION, REDUCTION IN SALARY, REPRIMAND, OR A CIVIL PENALTY NOT TO EXCEED \$10,000.

FORM 8B MEMORANDUM OF VOTING CONFLICT FOR COUNTY, MUNICIPAL, AND OTHER LOCAL PUBLIC OFFICERS

LAST NAME—FIRST NAME—MIDDLE NAME <i>Whitehorse, Benjamin Paul</i>		NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE Citrus Levy Marion Reg. Workforce Dev. Board(CareerSource)
MAILING ADDRESS <i>3901 SE 9th Avenue</i>		THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF:
CITY <i>Ocala</i>	COUNTY <i>Marion</i>	<input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
DATE ON WHICH VOTE OCCURRED 6/7/2023		NAME OF POLITICAL SUBDIVISION:
		MY POSITION IS: <input type="checkbox"/> ELECTIVE <input checked="" type="checkbox"/> APPOINTIVE

WHO MUST FILE FORM 8B

This form is for use by any person serving at the county, city, or other local level of government on an appointed or elected board, council, commission, authority, or committee. It applies to members of advisory and non-advisory bodies who are presented with a voting conflict of interest under Section 112.3143, Florida Statutes.

Your responsibilities under the law when faced with voting on a measure in which you have a conflict of interest will vary greatly depending on whether you hold an elective or appointive position. For this reason, please pay close attention to the instructions on this form before completing and filing the form.

INSTRUCTIONS FOR COMPLIANCE WITH SECTION 112.3143, FLORIDA STATUTES

A person holding elective or appointive county, municipal, or other local public office MUST ABSTAIN from voting on a measure which would inure to his or her special private gain or loss. Each elected or appointed local officer also MUST ABSTAIN from knowingly voting on a measure which would inure to the special gain or loss of a principal (other than a government agency) by whom he or she is retained (including the parent, subsidiary, or sibling organization of a principal by which he or she is retained); to the special private gain or loss of a relative; or to the special private gain or loss of a business associate. Commissioners of community redevelopment agencies (CRAs) under Sec. 163.356 or 163.357, F.S., and officers of independent special tax districts elected on a one-acre, one-vote basis are not prohibited from voting in that capacity.

For purposes of this law, a "relative" includes only the officer's father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, and daughter-in-law. A "business associate" means any person or entity engaged in or carrying on a business enterprise with the officer as a partner, joint venturer, coowner of property, or corporate shareholder (where the shares of the corporation are not listed on any national or regional stock exchange).

* * * * *

ELECTED OFFICERS:

In addition to abstaining from voting in the situations described above, you must disclose the conflict:

PRIOR TO THE VOTE BEING TAKEN by publicly stating to the assembly the nature of your interest in the measure on which you are abstaining from voting; and

WITHIN 15 DAYS AFTER THE VOTE OCCURS by completing and filing this form with the person responsible for recording the minutes of the meeting, who should incorporate the form in the minutes.

* * * * *

APPOINTED OFFICERS:

Although you must abstain from voting in the situations described above, you are not prohibited by Section 112.3143 from otherwise participating in these matters. However, you must disclose the nature of the conflict before making any attempt to influence the decision, whether orally or in writing and whether made by you or at your direction.

IF YOU INTEND TO MAKE ANY ATTEMPT TO INFLUENCE THE DECISION PRIOR TO THE MEETING AT WHICH THE VOTE WILL BE TAKEN:

- You must complete and file this form (before making any attempt to influence the decision) with the person responsible for recording the minutes of the meeting, who will incorporate the form in the minutes. (Continued on page 2)

APPOINTED OFFICERS (continued)

- A copy of the form must be provided immediately to the other members of the agency.
- The form must be read publicly at the next meeting after the form is filed.

IF YOU MAKE NO ATTEMPT TO INFLUENCE THE DECISION EXCEPT BY DISCUSSION AT THE MEETING:

- You must disclose orally the nature of your conflict in the measure before participating.
- You must complete the form and file it within 15 days after the vote occurs with the person responsible for recording the minutes of the meeting, who must incorporate the form in the minutes. A copy of the form must be provided immediately to the other members of the agency, and the form must be read publicly at the next meeting after the form is filed.

DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, Benjamin Whitehouse, hereby disclose that on June 7, 20 23 :

(a) A measure came or will come before my agency which (check one or more)

- ☐ inured to my special private gain or loss;
- ☐ inured to the special gain or loss of my business associate, _____;
- ☐ inured to the special gain or loss of my relative, _____;
- ☒ inured to the special gain or loss of Marion County School Board, by whom I am retained; or
- ☐ inured to the special gain or loss of _____, which is the parent subsidiary, or sibling organization or subsidiary of a principal which has retained me.

(b) The measure before my agency and the nature of my conflicting interest in the measure is as follows:

Contract with Marion County School Board for training and facility usage. I am a current employee of the School Board

If disclosure of specific information would violate confidentiality or privilege pursuant to law or rules governing attorneys, a public officer, who is also an attorney, may comply with the disclosure requirements of this section by disclosing the nature of the interest in such a way as to provide the public with notice of the conflict.

6/7/2023

Date Filed



Signature

NOTICE: UNDER PROVISIONS OF FLORIDA STATUTES §112.317, A FAILURE TO MAKE ANY REQUIRED DISCLOSURE CONSTITUTES GROUNDS FOR AND MAY BE PUNISHED BY ONE OR MORE OF THE FOLLOWING: IMPEACHMENT, REMOVAL OR SUSPENSION FROM OFFICE OR EMPLOYMENT, DEMOTION, REDUCTION IN SALARY, REPRIMAND, OR A CIVIL PENALTY NOT TO EXCEED \$10,000.

FORM 8B MEMORANDUM OF VOTING CONFLICT FOR COUNTY, MUNICIPAL, AND OTHER LOCAL PUBLIC OFFICERS

LAST NAME—FIRST NAME—MIDDLE NAME <i>Murphy John</i>	NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE Citrus Levy Marion Reg. Workforce Dev. Board(CareerSource)
MAILING ADDRESS <i>1624 N Meadowcrest Blvd</i>	THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
CITY COUNTY <i>Crystal River FL Citrus</i>	NAME OF POLITICAL SUBDIVISION:
DATE ON WHICH VOTE OCCURRED 6/7/2023	MY POSITION IS: <input type="checkbox"/> ELECTIVE <input checked="" type="checkbox"/> APPOINTIVE

WHO MUST FILE FORM 8B

This form is for use by any person serving at the county, city, or other local level of government on an appointed or elected board, council, commission, authority, or committee. It applies to members of advisory and non-advisory bodies who are presented with a voting conflict of interest under Section 112.3143, Florida Statutes.

Your responsibilities under the law when faced with voting on a measure in which you have a conflict of interest will vary greatly depending on whether you hold an elective or appointive position. For this reason, please pay close attention to the instructions on this form before completing and filing the form.

INSTRUCTIONS FOR COMPLIANCE WITH SECTION 112.3143, FLORIDA STATUTES

A person holding elective or appointive county, municipal, or other local public office **MUST ABSTAIN** from voting on a measure which would inure to his or her special private gain or loss. Each elected or appointed local officer also **MUST ABSTAIN** from knowingly voting on a measure which would inure to the special gain or loss of a principal (other than a government agency) by whom he or she is retained (including the parent, subsidiary, or sibling organization of a principal by which he or she is retained); to the special private gain or loss of a relative; or to the special private gain or loss of a business associate. Commissioners of community redevelopment agencies (CRAs) under Sec. 163.356 or 163.357, F.S., and officers of independent special tax districts elected on a one-acre, one-vote basis are not prohibited from voting in that capacity.

For purposes of this law, a "relative" includes only the officer's father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, and daughter-in-law. A "business associate" means any person or entity engaged in or carrying on a business enterprise with the officer as a partner, joint venturer, coowner of property, or corporate shareholder (where the shares of the corporation are not listed on any national or regional stock exchange).

* * * * *

ELECTED OFFICERS:

In addition to abstaining from voting in the situations described above, you must disclose the conflict:

PRIOR TO THE VOTE BEING TAKEN by publicly stating to the assembly the nature of your interest in the measure on which you are abstaining from voting; *and*

WITHIN 15 DAYS AFTER THE VOTE OCCURS by completing and filing this form with the person responsible for recording the minutes of the meeting, who should incorporate the form in the minutes.

* * * * *

APPOINTED OFFICERS:

Although you must abstain from voting in the situations described above, you are not prohibited by Section 112.3143 from otherwise participating in these matters. However, you must disclose the nature of the conflict before making any attempt to influence the decision, whether orally or in writing and whether made by you or at your direction.

IF YOU INTEND TO MAKE ANY ATTEMPT TO INFLUENCE THE DECISION PRIOR TO THE MEETING AT WHICH THE VOTE WILL BE TAKEN:

- You must complete and file this form (before making any attempt to influence the decision) with the person responsible for recording the minutes of the meeting, who will incorporate the form in the minutes. (Continued on page 2)

APPOINTED OFFICERS (continued)

- A copy of the form must be provided immediately to the other members of the agency.
- The form must be read publicly at the next meeting after the form is filed.

IF YOU MAKE NO ATTEMPT TO INFLUENCE THE DECISION EXCEPT BY DISCUSSION AT THE MEETING:

- You must disclose orally the nature of your conflict in the measure before participating.
- You must complete the form and file it within 15 days after the vote occurs with the person responsible for recording the minutes of the meeting, who must incorporate the form in the minutes. A copy of the form must be provided immediately to the other members of the agency, and the form must be read publicly at the next meeting after the form is filed.

DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, John Murphy, hereby disclose that on June 7, 20 23 :

(a) A measure came or will come before my agency which (check one or more)

- ☒ inured to my special private gain or loss;
- ☐ inured to the special gain or loss of my business associate, _____ ;
- ☐ inured to the special gain or loss of my relative, _____ ;
- ☐ inured to the special gain or loss of _____ , by
whom I am retained; or
- ☐ inured to the special gain or loss of _____ , which
is the parent subsidiary, or sibling organization or subsidiary of a principal which has retained me.

(b) The measure before my agency and the nature of my conflicting interest in the measure is as follows:

Board Member of Citrus County Chamber

If disclosure of specific information would violate confidentiality or privilege pursuant to law or rules governing attorneys, a public officer, who is also an attorney, may comply with the disclosure requirements of this section by disclosing the nature of the interest in such a way as to provide the public with notice of the conflict.

6/7/2023

Date Filed

[Signature]
Signature

NOTICE: UNDER PROVISIONS OF FLORIDA STATUTES §112.317, A FAILURE TO MAKE ANY REQUIRED DISCLOSURE CONSTITUTES GROUNDS FOR AND MAY BE PUNISHED BY ONE OR MORE OF THE FOLLOWING: IMPEACHMENT, REMOVAL OR SUSPENSION FROM OFFICE OR EMPLOYMENT, DEMOTION, REDUCTION IN SALARY, REPRIMAND, OR A CIVIL PENALTY NOT TO EXCEED \$10,000.

FORM 8B MEMORANDUM OF VOTING CONFLICT FOR COUNTY, MUNICIPAL, AND OTHER LOCAL PUBLIC OFFICERS

LAST NAME—FIRST NAME—MIDDLE NAME Houlios, Judoth C		NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE Citrus Levy Marion Reg. Workforce Dev. Board(CareerSource)	
MAILING ADDRESS 5720 SE 22 Place		THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF:	
CITY Ocala	COUNTY Marion	<input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY	
DATE ON WHICH VOTE OCCURRED 6/7/2023		NAME OF POLITICAL SUBDIVISION:	
		MY POSITION IS: <input type="checkbox"/> ELECTIVE <input checked="" type="checkbox"/> APPOINTIVE	

WHO MUST FILE FORM 8B

This form is for use by any person serving at the county, city, or other local level of government on an appointed or elected board, council, commission, authority, or committee. It applies to members of advisory and non-advisory bodies who are presented with a voting conflict of interest under Section 112.3143, Florida Statutes.

Your responsibilities under the law when faced with voting on a measure in which you have a conflict of interest will vary greatly depending on whether you hold an elective or appointive position. For this reason, please pay close attention to the instructions on this form before completing and filing the form.

INSTRUCTIONS FOR COMPLIANCE WITH SECTION 112.3143, FLORIDA STATUTES

A person holding elective or appointive county, municipal, or other local public office **MUST ABSTAIN** from voting on a measure which would inure to his or her special private gain or loss. Each elected or appointed local officer also **MUST ABSTAIN** from knowingly voting on a measure which would inure to the special gain or loss of a principal (other than a government agency) by whom he or she is retained (including the parent, subsidiary, or sibling organization of a principal by which he or she is retained); to the special private gain or loss of a relative; or to the special private gain or loss of a business associate. Commissioners of community redevelopment agencies (CRAs) under Sec. 163.356 or 163.357, F.S., and officers of independent special tax districts elected on a one-acre, one-vote basis are not prohibited from voting in that capacity.

For purposes of this law, a "relative" includes only the officer's father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, and daughter-in-law. A "business associate" means any person or entity engaged in or carrying on a business enterprise with the officer as a partner, joint venturer, coowner of property, or corporate shareholder (where the shares of the corporation are not listed on any national or regional stock exchange).

* * * * *

ELECTED OFFICERS:

In addition to abstaining from voting in the situations described above, you must disclose the conflict:

PRIOR TO THE VOTE BEING TAKEN by publicly stating to the assembly the nature of your interest in the measure on which you are abstaining from voting; *and*

WITHIN 15 DAYS AFTER THE VOTE OCCURS by completing and filing this form with the person responsible for recording the minutes of the meeting, who should incorporate the form in the minutes.

* * * * *

APPOINTED OFFICERS:

Although you must abstain from voting in the situations described above, you are not prohibited by Section 112.3143 from otherwise participating in these matters. However, you must disclose the nature of the conflict before making any attempt to influence the decision, whether orally or in writing and whether made by you or at your direction.

IF YOU INTEND TO MAKE ANY ATTEMPT TO INFLUENCE THE DECISION PRIOR TO THE MEETING AT WHICH THE VOTE WILL BE TAKEN:

- You must complete and file this form (before making any attempt to influence the decision) with the person responsible for recording the minutes of the meeting, who will incorporate the form in the minutes. (Continued on page 2)

APPOINTED OFFICERS (continued)

- A copy of the form must be provided immediately to the other members of the agency.
- The form must be read publicly at the next meeting after the form is filed.

IF YOU MAKE NO ATTEMPT TO INFLUENCE THE DECISION EXCEPT BY DISCUSSION AT THE MEETING:

- You must disclose orally the nature of your conflict in the measure before participating.
- You must complete the form and file it within 15 days after the vote occurs with the person responsible for recording the minutes of the meeting, who must incorporate the form in the minutes. A copy of the form must be provided immediately to the other members of the agency, and the form must be read publicly at the next meeting after the form is filed.

DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, Judith Houlios, hereby disclose that on June 7, 20 23 :

(a) A measure came or will come before my agency which (check one or more)

- ☐ inured to my special private gain or loss;
- ☐ inured to the special gain or loss of my business associate, _____ ;
- ☐ inured to the special gain or loss of my relative, _____ ;
- ☒ inured to the special gain or loss of Ocala Housing Authority, by whom I am retained; or
- ☐ inured to the special gain or loss of _____, which is the parent subsidiary, or sibling organization or subsidiary of a principal which has retained me.

(b) The measure before my agency and the nature of my conflicting interest in the measure is as follows:

I am an employee of the Ocala Housing Authority

Employee of Ocala Housing Authority

If disclosure of specific information would violate confidentiality or privilege pursuant to law or rules governing attorneys, a public officer, who is also an attorney, may comply with the disclosure requirements of this section by disclosing the nature of the interest in such a way as to provide the public with notice of the conflict.

6/7/2023

Date Filed

Judith Houlios
Signature

NOTICE: UNDER PROVISIONS OF FLORIDA STATUTES §112.317, A FAILURE TO MAKE ANY REQUIRED DISCLOSURE CONSTITUTES GROUNDS FOR AND MAY BE PUNISHED BY ONE OR MORE OF THE FOLLOWING: IMPEACHMENT, REMOVAL OR SUSPENSION FROM OFFICE OR EMPLOYMENT, DEMOTION, REDUCTION IN SALARY, REPRIMAND, OR A CIVIL PENALTY NOT TO EXCEED \$10,000.

FORM 8B MEMORANDUM OF VOTING CONFLICT FOR COUNTY, MUNICIPAL, AND OTHER LOCAL PUBLIC OFFICERS

LAST NAME—FIRST NAME—MIDDLE NAME Cunningham Kevin David		NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE Citrus Levy Marion Reg. Workforce Dev. Board (CareerSource)
MAILING ADDRESS 2421 N. Lecanto Hwy		THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF:
CITY Lecanto FL	COUNTY Citrus	<input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
DATE ON WHICH VOTE OCCURRED 6/7/2023		NAME OF POLITICAL SUBDIVISION:
		MY POSITION IS: <input type="checkbox"/> ELECTIVE <input checked="" type="checkbox"/> APPOINTEE

WHO MUST FILE FORM 8B

This form is for use by any person serving at the county, city, or other local level of government on an appointed or elected board, council, commission, authority, or committee. It applies to members of advisory and non-advisory bodies who are presented with a voting conflict of interest under Section 112.3143, Florida Statutes.

Your responsibilities under the law when faced with voting on a measure in which you have a conflict of interest will vary greatly depending on whether you hold an elective or appointive position. For this reason, please pay close attention to the instructions on this form before completing and filing the form.

INSTRUCTIONS FOR COMPLIANCE WITH SECTION 112.3143, FLORIDA STATUTES

A person holding elective or appointive county, municipal, or other local public office **MUST ABSTAIN** from voting on a measure which would inure to his or her special private gain or loss. Each elected or appointed local officer also **MUST ABSTAIN** from knowingly voting on a measure which would inure to the special gain or loss of a principal (other than a government agency) by whom he or she is retained (including the parent, subsidiary, or sibling organization of a principal by which he or she is retained); to the special private gain or loss of a relative; or to the special private gain or loss of a business associate. Commissioners of community redevelopment agencies (CRAs) under Sec. 163.356 or 163.357, F.S., and officers of independent special tax districts elected on a one-acre, one-vote basis are not prohibited from voting in that capacity.

For purposes of this law, a "relative" includes only the officer's father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, and daughter-in-law. A "business associate" means any person or entity engaged in or carrying on a business enterprise with the officer as a partner, joint venturer, coowner of property, or corporate shareholder (where the shares of the corporation are not listed on any national or regional stock exchange).

ELECTED OFFICERS:

In addition to abstaining from voting in the situations described above, you must disclose the conflict:

PRIOR TO THE VOTE BEING TAKEN by publicly stating to the assembly the nature of your interest in the measure on which you are abstaining from voting; *and*

WITHIN 15 DAYS AFTER THE VOTE OCCURS by completing and filing this form with the person responsible for recording the minutes of the meeting, who should incorporate the form in the minutes.

APPOINTED OFFICERS:

Although you must abstain from voting in the situations described above, you are not prohibited by Section 112.3143 from otherwise participating in these matters. However, you must disclose the nature of the conflict before making any attempt to influence the decision, whether orally or in writing and whether made by you or at your direction.

IF YOU INTEND TO MAKE ANY ATTEMPT TO INFLUENCE THE DECISION PRIOR TO THE MEETING AT WHICH THE VOTE WILL BE TAKEN:

- You must complete and file this form (before making any attempt to influence the decision) with the person responsible for recording the minutes of the meeting, who will incorporate the form in the minutes. (Continued on page 2)

APPOINTED OFFICERS (continued)

- A copy of the form must be provided immediately to the other members of the agency.
- The form must be read publicly at the next meeting after the form is filed.

IF YOU MAKE NO ATTEMPT TO INFLUENCE THE DECISION EXCEPT BY DISCUSSION AT THE MEETING:

- You must disclose orally the nature of your conflict in the measure before participating.
- You must complete the form and file it within 15 days after the vote occurs with the person responsible for recording the minutes of the meeting, who must incorporate the form in the minutes. A copy of the form must be provided immediately to the other members of the agency, and the form must be read publicly at the next meeting after the form is filed.

DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, Kevin D. Cunningham, hereby disclose that on June 7, 20 23 :

(a) A measure came or will come before my agency which (check one or more)

- ☐ inured to my special private gain or loss;
- ☐ inured to the special gain or loss of my business associate, _____ ;
- ☐ inured to the special gain or loss of my relative, _____ ;
- ☐ inured to the special gain or loss of _____, by
whom I am retained; or
- ☐ inured to the special gain or loss of _____, which
is the parent subsidiary, or sibling organization or subsidiary of a principal which has retained me.

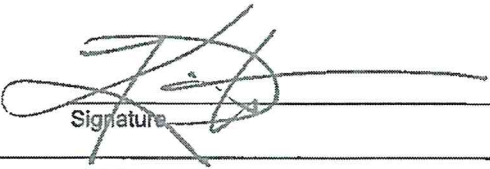
(b) The measure before my agency and the nature of my conflicting interest in the measure is as follows:

Inured to the special gain or loss of Citrus County
Chamber of Commerce which whom I am a Board Member.

If disclosure of specific information would violate confidentiality or privilege pursuant to law or rules governing attorneys, a public officer, who is also an attorney, may comply with the disclosure requirements of this section by disclosing the nature of the interest in such a way as to provide the public with notice of the conflict.

6/7/2023

Date Filed


Signature

NOTICE: UNDER PROVISIONS OF FLORIDA STATUTES §112.317, A FAILURE TO MAKE ANY REQUIRED DISCLOSURE CONSTITUTES GROUNDS FOR AND MAY BE PUNISHED BY ONE OR MORE OF THE FOLLOWING: IMPEACHMENT, REMOVAL OR SUSPENSION FROM OFFICE OR EMPLOYMENT, DEMOTION, REDUCTION IN SALARY, REPRIMAND, OR A CIVIL PENALTY NOT TO EXCEED \$10,000.

FORM 8B MEMORANDUM OF VOTING CONFLICT FOR COUNTY, MUNICIPAL, AND OTHER LOCAL PUBLIC OFFICERS

LAST NAME—FIRST NAME—MIDDLE NAME PAUGH, Mark LEE		NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE Citrus Levy Marion Reg. Workforce Dev. Board(CareerSource)	
MAILING ADDRESS 3001 SW College Rd, Marion		THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF:	
CITY Ocala		<input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY	
DATE ON WHICH VOTE OCCURRED 6/7/2023		NAME OF POLITICAL SUBDIVISION:	
		MY POSITION IS <input type="checkbox"/> ELECTIVE <input checked="" type="checkbox"/> APPOINTIVE	

WHO MUST FILE FORM 8B

This form is for use by any person serving at the county, city, or other local level of government on an appointed or elected board, council, commission, authority, or committee. It applies to members of advisory and non-advisory bodies who are presented with a voting conflict of interest under Section 112.3143, Florida Statutes.

Your responsibilities under the law when faced with voting on a measure in which you have a conflict of interest will vary greatly depending on whether you hold an elective or appointive position. For this reason, please pay close attention to the instructions on this form before completing and filing the form.

INSTRUCTIONS FOR COMPLIANCE WITH SECTION 112.3143, FLORIDA STATUTES

A person holding elective or appointive county, municipal, or other local public office **MUST ABSTAIN** from voting on a measure which would inure to his or her special private gain or loss. Each elected or appointed local officer also **MUST ABSTAIN** from knowingly voting on a measure which would inure to the special gain or loss of a principal (other than a government agency) by whom he or she is retained (including the parent, subsidiary, or sibling organization of a principal by which he or she is retained); to the special private gain or loss of a relative; or to the special private gain or loss of a business associate. Commissioners of community redevelopment agencies (CRAs) under Sec. 163.356 or 163.357, F.S., and officers of independent special tax districts elected on a one-acre, one-vote basis are not prohibited from voting in that capacity.

For purposes of this law, a "relative" includes only the officer's father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, and daughter-in-law. A "business associate" means any person or entity engaged in or carrying on a business enterprise with the officer as a partner, joint venturer, coowner of property, or corporate shareholder (where the shares of the corporation are not listed on any national or regional stock exchange).

ELECTED OFFICERS:

In addition to abstaining from voting in the situations described above, you must disclose the conflict:

PRIOR TO THE VOTE BEING TAKEN by publicly stating to the assembly the nature of your interest in the measure on which you are abstaining from voting; *and*

WITHIN 15 DAYS AFTER THE VOTE OCCURS by completing and filing this form with the person responsible for recording the minutes of the meeting, who should incorporate the form in the minutes.

APPOINTED OFFICERS:

Although you must abstain from voting in the situations described above, you are not prohibited by Section 112.3143 from otherwise participating in these matters. However, you must disclose the nature of the conflict before making any attempt to influence the decision, whether orally or in writing and whether made by you or at your direction.

IF YOU INTEND TO MAKE ANY ATTEMPT TO INFLUENCE THE DECISION PRIOR TO THE MEETING AT WHICH THE VOTE WILL BE TAKEN:

- You must complete and file this form (before making any attempt to influence the decision) with the person responsible for recording the minutes of the meeting, who will incorporate the form in the minutes. (Continued on page 2)

APPOINTED OFFICERS (continued)

- A copy of the form must be provided immediately to the other members of the agency.
- The form must be read publicly at the next meeting after the form is filed.

IF YOU MAKE NO ATTEMPT TO INFLUENCE THE DECISION EXCEPT BY DISCUSSION AT THE MEETING:

- You must disclose orally the nature of your conflict in the measure before participating.
- You must complete the form and file it within 15 days after the vote occurs with the person responsible for recording the minutes of the meeting, who must incorporate the form in the minutes. A copy of the form must be provided immediately to the other members of the agency, and the form must be read publicly at the next meeting after the form is filed.

DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, Mark Lee Paugh, hereby disclose that on June 7, 20 23 :

(a) A measure came or will come before my agency which (check one or more)

- ☐ inured to my special private gain or loss;
- ☐ inured to the special gain or loss of my business associate, _____;
- ☐ inured to the special gain or loss of my relative, _____;
- ☒ inured to the special gain or loss of College of Central Florida, by whom I am retained; or
- ☐ inured to the special gain or loss of _____, which is the parent subsidiary, or sibling organization or subsidiary of a principal which has retained me.

(b) The measure before my agency and the nature of my conflicting interest in the measure is as follows:

Employee of CF

If disclosure of specific information would violate confidentiality or privilege pursuant to law or rules governing attorneys, a public officer, who is also an attorney, may comply with the disclosure requirements of this section by disclosing the nature of the interest in such a way as to provide the public with notice of the conflict.

6/7/2023

Date Filed

Mark Lee Paugh
Signature

NOTICE: UNDER PROVISIONS OF FLORIDA STATUTES §112.317, A FAILURE TO MAKE ANY REQUIRED DISCLOSURE CONSTITUTES GROUNDS FOR AND MAY BE PUNISHED BY ONE OR MORE OF THE FOLLOWING: IMPEACHMENT, REMOVAL OR SUSPENSION FROM OFFICE OR EMPLOYMENT, DEMOTION, REDUCTION IN SALARY, REPRIMAND, OR A CIVIL PENALTY NOT TO EXCEED \$10,000.

FORM 8B MEMORANDUM OF VOTING CONFLICT FOR COUNTY, MUNICIPAL, AND OTHER LOCAL PUBLIC OFFICERS

LAST NAME—FIRST NAME—MIDDLE NAME <i>Taylor, Tanya - Michelle</i>	NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE Citrus Levy Marion Reg. Workforce Dev. Board(CareerSource)
MAILING ADDRESS <i>480 Marshburn Drive Bronson, FL 32621</i>	THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF: <input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY
CITY <i>Bronson, FL</i>	COUNTY <i>Levy</i>
DATE ON WHICH VOTE OCCURRED 6/7/2023	NAME OF POLITICAL SUBDIVISION: MY POSITION IS: <input type="checkbox"/> ELECTIVE <input checked="" type="checkbox"/> APPOINTIVE

WHO MUST FILE FORM 8B

This form is for use by any person serving at the county, city, or other local level of government on an appointed or elected board, council, commission, authority, or committee. It applies to members of advisory and non-advisory bodies who are presented with a voting conflict of interest under Section 112.3143, Florida Statutes.

Your responsibilities under the law when faced with voting on a measure in which you have a conflict of interest will vary greatly depending on whether you hold an elective or appointive position. For this reason, please pay close attention to the instructions on this form before completing and filing the form.

INSTRUCTIONS FOR COMPLIANCE WITH SECTION 112.3143, FLORIDA STATUTES

A person holding elective or appointive county, municipal, or other local public office **MUST ABSTAIN** from voting on a measure which would inure to his or her special private gain or loss. Each elected or appointed local officer also **MUST ABSTAIN** from knowingly voting on a measure which would inure to the special gain or loss of a principal (other than a government agency) by whom he or she is retained (including the parent, subsidiary, or sibling organization of a principal by which he or she is retained); to the special private gain or loss of a relative; or to the special private gain or loss of a business associate. Commissioners of community redevelopment agencies (CRAs) under Sec. 163.356 or 163.357, F.S., and officers of independent special tax districts elected on a one-acre, one-vote basis are not prohibited from voting in that capacity.

For purposes of this law, a "relative" includes only the officer's father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, and daughter-in-law. A "business associate" means any person or entity engaged in or carrying on a business enterprise with the officer as a partner, joint venturer, coowner of property, or corporate shareholder (where the shares of the corporation are not listed on any national or regional stock exchange).

* * * * *

ELECTED OFFICERS:

In addition to abstaining from voting in the situations described above, you must disclose the conflict:

PRIOR TO THE VOTE BEING TAKEN by publicly stating to the assembly the nature of your interest in the measure on which you are abstaining from voting; *and*

WITHIN 15 DAYS AFTER THE VOTE OCCURS by completing and filing this form with the person responsible for recording the minutes of the meeting, who should incorporate the form in the minutes.

* * * * *

APPOINTED OFFICERS:

Although you must abstain from voting in the situations described above, you are not prohibited by Section 112.3143 from otherwise participating in these matters. However, you must disclose the nature of the conflict before making any attempt to influence the decision, whether orally or in writing and whether made by you or at your direction.

IF YOU INTEND TO MAKE ANY ATTEMPT TO INFLUENCE THE DECISION PRIOR TO THE MEETING AT WHICH THE VOTE WILL BE TAKEN:

- You must complete and file this form (before making any attempt to influence the decision) with the person responsible for recording the minutes of the meeting, who will incorporate the form in the minutes. (Continued on page 2)

APPOINTED OFFICERS (continued)

- A copy of the form must be provided immediately to the other members of the agency.
- The form must be read publicly at the next meeting after the form is filed.

IF YOU MAKE NO ATTEMPT TO INFLUENCE THE DECISION EXCEPT BY DISCUSSION AT THE MEETING:

- You must disclose orally the nature of your conflict in the measure before participating.
- You must complete the form and file it within 15 days after the vote occurs with the person responsible for recording the minutes of the meeting, who must incorporate the form in the minutes. A copy of the form must be provided immediately to the other members of the agency, and the form must be read publicly at the next meeting after the form is filed.

DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, Tanya Taylor, hereby disclose that on June 7, 20 23 :

(a) A measure came or will come before my agency which (check one or more)

- ☐ inured to my special private gain or loss;
- ☒ inured to the special gain or loss of my business associate, L Levy County Schools ;
- ☐ inured to the special gain or loss of my relative, _____ ;
- ☐ inured to the special gain or loss of _____ , by
whom I am retained; or
- ☐ inured to the special gain or loss of _____ , which
is the parent subsidiary, or sibling organization or subsidiary of a principal which has retained me.

(b) The measure before my agency and the nature of my conflicting interest in the measure is as follows:

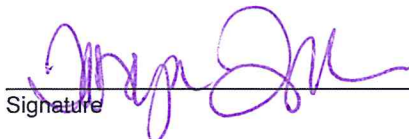
L Levy County Schools employee

If disclosure of specific information would violate confidentiality or privilege pursuant to law or rules governing attorneys, a public officer, who is also an attorney, may comply with the disclosure requirements of this section by disclosing the nature of the interest in such a way as to provide the public with notice of the conflict.

6/7/2023

Date Filed

Signature



NOTICE: UNDER PROVISIONS OF FLORIDA STATUTES §112.317, A FAILURE TO MAKE ANY REQUIRED DISCLOSURE CONSTITUTES GROUNDS FOR AND MAY BE PUNISHED BY ONE OR MORE OF THE FOLLOWING: IMPEACHMENT, REMOVAL OR SUSPENSION FROM OFFICE OR EMPLOYMENT, DEMOTION, REDUCTION IN SALARY, REPRIMAND, OR A CIVIL PENALTY NOT TO EXCEED \$10,000.

FORM 8B MEMORANDUM OF VOTING CONFLICT FOR COUNTY, MUNICIPAL, AND OTHER LOCAL PUBLIC OFFICERS

LAST NAME—FIRST NAME—MIDDLE NAME <i>Flick, Theresa Darts</i>		NAME OF BOARD, COUNCIL, COMMISSION, AUTHORITY, OR COMMITTEE Citrus Levy Marion Reg. Workforce Dev. Board(CareerSource)	
MAILING ADDRESS <i>11309 W. Amerindian Ave.</i>		THE BOARD, COUNCIL, COMMISSION, AUTHORITY OR COMMITTEE ON WHICH I SERVE IS A UNIT OF:	
CITY <i>Crystal River</i>	COUNTY <i>Citrus</i>	<input type="checkbox"/> CITY <input type="checkbox"/> COUNTY <input checked="" type="checkbox"/> OTHER LOCAL AGENCY	
DATE ON WHICH VOTE OCCURRED <i>6/7/2023</i>		NAME OF POLITICAL SUBDIVISION:	
		MY POSITION IS: <input type="checkbox"/> ELECTIVE <input checked="" type="checkbox"/> APPOINTIVE	

WHO MUST FILE FORM 8B

This form is for use by any person serving at the county, city, or other local level of government on an appointed or elected board, council, commission, authority, or committee. It applies to members of advisory and non-advisory bodies who are presented with a voting conflict of interest under Section 112.3143, Florida Statutes.

Your responsibilities under the law when faced with voting on a measure in which you have a conflict of interest will vary greatly depending on whether you hold an elective or appointive position. For this reason, please pay close attention to the instructions on this form before completing and filing the form.

INSTRUCTIONS FOR COMPLIANCE WITH SECTION 112.3143, FLORIDA STATUTES

A person holding elective or appointive county, municipal, or other local public office **MUST ABSTAIN** from voting on a measure which would inure to his or her special private gain or loss. Each elected or appointed local officer also **MUST ABSTAIN** from knowingly voting on a measure which would inure to the special gain or loss of a principal (other than a government agency) by whom he or she is retained (including the parent, subsidiary, or sibling organization of a principal by which he or she is retained); to the special private gain or loss of a relative; or to the special private gain or loss of a business associate. Commissioners of community redevelopment agencies (CRAs) under Sec. 163.356 or 163.357, F.S., and officers of independent special tax districts elected on a one-acre, one-vote basis are not prohibited from voting in that capacity.

For purposes of this law, a "relative" includes only the officer's father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, and daughter-in-law. A "business associate" means any person or entity engaged in or carrying on a business enterprise with the officer as a partner, joint venturer, coowner of property, or corporate shareholder (where the shares of the corporation are not listed on any national or regional stock exchange).

ELECTED OFFICERS:

In addition to abstaining from voting in the situations described above, you must disclose the conflict:

PRIOR TO THE VOTE BEING TAKEN by publicly stating to the assembly the nature of your interest in the measure on which you are abstaining from voting; *and*

WITHIN 15 DAYS AFTER THE VOTE OCCURS by completing and filing this form with the person responsible for recording the minutes of the meeting, who should incorporate the form in the minutes.

APPOINTED OFFICERS:

Although you must abstain from voting in the situations described above, you are not prohibited by Section 112.3143 from otherwise participating in these matters. However, you must disclose the nature of the conflict before making any attempt to influence the decision, whether orally or in writing and whether made by you or at your direction.

IF YOU INTEND TO MAKE ANY ATTEMPT TO INFLUENCE THE DECISION PRIOR TO THE MEETING AT WHICH THE VOTE WILL BE TAKEN:

- You must complete and file this form (before making any attempt to influence the decision) with the person responsible for recording the minutes of the meeting, who will incorporate the form in the minutes. (Continued on page 2)

APPOINTED OFFICERS (continued)

- A copy of the form must be provided immediately to the other members of the agency.
- The form must be read publicly at the next meeting after the form is filed.

IF YOU MAKE NO ATTEMPT TO INFLUENCE THE DECISION EXCEPT BY DISCUSSION AT THE MEETING:

- You must disclose orally the nature of your conflict in the measure before participating.
- You must complete the form and file it within 15 days after the vote occurs with the person responsible for recording the minutes of the meeting, who must incorporate the form in the minutes. A copy of the form must be provided immediately to the other members of the agency, and the form must be read publicly at the next meeting after the form is filed.

DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, Theresa Flick, hereby disclose that on June 7, 20 23:

(a) A measure came or will come before my agency which (check one or more)

- ☐ inured to my special private gain or loss;
- ☐ inured to the special gain or loss of my business associate, _____;
- ☐ inured to the special gain or loss of my relative, _____;
- ☒ inured to the special gain or loss of Key Training Center, by whom I am retained; or
- ☐ inured to the special gain or loss of _____, which is the parent subsidiary, or sibling organization or subsidiary of a principal which has retained me.

(b) The measure before my agency and the nature of my conflicting interest in the measure is as follows:

Voting on a Master contract to provide OJT, CBT or Apprenticeship Training Opportunities services to Key Training Center

If disclosure of specific information would violate confidentiality or privilege pursuant to law or rules governing attorneys, a public officer, who is also an attorney, may comply with the disclosure requirements of this section by disclosing the nature of the interest in such a way as to provide the public with notice of the conflict.

6/7/2023

Date Filed

Theresa Flick
Signature

NOTICE: UNDER PROVISIONS OF FLORIDA STATUTES §112.317, A FAILURE TO MAKE ANY REQUIRED DISCLOSURE CONSTITUTES GROUNDS FOR AND MAY BE PUNISHED BY ONE OR MORE OF THE FOLLOWING: IMPEACHMENT, REMOVAL OR SUSPENSION FROM OFFICE OR EMPLOYMENT, DEMOTION, REDUCTION IN SALARY, REPRIMAND, OR A CIVIL PENALTY NOT TO EXCEED \$10,000.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023

TOPIC/ISSUE:

Draft program year 2023 Budget (7/1/23-6/30/24)

BACKGROUND:

2022 vs. 2023 Funding Comparison

	2022	2023	% Change
Adult	1,208,208	1,162,150	-4.00%
Dislocated	925,993	574,175	-38.00%
Youth	1,150,624	1,121,786	-3.00%
Welfare Transition	1,762,874	1,547,640	-12.00%
Wagner Peyser	117,879	193,475	64.00%

Total:	5,165,578	4,599,226	-11%
---------------	------------------	------------------	-------------

POINTS OF CONSIDERATION:

This budget is based preliminary allocations and estimated carryforwards.

STAFF RECOMMENDATIONS:

Approve draft 2023 Budget.

COMMITTEE ACTION:

Al Jones made a motion to approve the draft 2023 budget. Charles Harris seconded the motion. Motion carried.

BOARD ACTION:

Ben Whitehouse made a motion to approve the preliminary 2023-2024 budget. Kathy Judkins seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting Tuesday, June 7, 2023

TOPIC/ISSUE:

FWDA Dues

BACKGROUND:

Membership to the Florida Workforce Development Association promotes collaboration, convening and sharing of best practices between member workforce boards.

POINTS OF CONSIDERATION:

STAFF RECOMMENDATIONS:

Approve paying \$5000.00 from unrestricted funds for FWDA dues.

BOARD ACTION:

Mark Paugh made a motion to approve paying the FWDA dues out of unrestricted funds. Kathy Judkins seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
CEO Review Committee, Wednesday, May 31, 2023
CEO Review Committee, Monday, May 22, 2023

TOPIC/ISSUE:

Discussion and recommendation for renewal of CEO contract for 2023 – 2024

BACKGROUND:

CEO Salary History		
Year	Salary	Increase
2016 - 17	\$ 120,000.19	3%
2017 - 18	\$ 123,600.26	3%
2018 - 19	\$ 127,308.00	3%
2019 - 20	\$ 133,036.86	4.5 %
2020 - 21	\$ 137,027.97	3%
2021 - 22	\$ 137,027.97	0%
2022 - 23	\$ 137,027.97	0%

POINTS OF CONSIDERATION:

STAFF RECOMMENDATIONS:

COMMITTEE ACTION:

May 22, 2023: Brandon Whiteman made a motion to table the decision on approving the contract renewal until after the upcoming Executive meeting on May 31, when more budget information may be available. Kim Baxley seconded the motion. Motion carried.
May 31, 2023: Al Jones made a motion to approve Rusty Skinner's contract for the 2023-2024 program year, and also approved the retention incentive intended for all staff. Kim Baxley seconded the motion. Motion carried.

BOARD ACTION:

Kathy Judkins made a motion to approve Rusty Skinner's 2023-2024 contract and retention incentive. Charles Harris seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Performance and Monitoring Committee, Tuesday, May 9, 2023

TOPIC/ISSUE:

Acceptance of the Department of Labor (DOL) YouthBuild monitoring report.

BACKGROUND:

Eric Dent (federal project officer) conducted monitoring on the 2019 YB grant from December 5 through December 9. An exit conference was held on January 20, 2023.

POINTS OF CONSIDERATION:

The final report revealed no Non-compliance issues or Findings. No other issues were reported. DOL staff thanked our staff for running a quality and transparent program. No further action is required.

STAFF RECOMMENDATIONS:

Accept the monitoring report as submitted to us from the DOL.

COMMITTEE ACTION:

Al Jones made a motion to accept the monitoring report. Fred Morgan seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Career Center Committee, Thursday, May 18, 2023

TOPIC/ISSUE:

Approval of the addition of the College of Central Florida training programs to the Area Targeted Occupation List.

BACKGROUND:

All education entities that wish programs to be listed on CareerSource CLM's Area Targeted Occupation List (ATOL) must submit a Training Provider Application that includes performance data for each of the training programs they would like listed on the ATOL pursuant to CLM policy *OPS-28 Area Targeted Occupation List*.

POINTS OF CONSIDERATION:

the College of Central Florida has submitted the required documentation requesting the following training programs listed on the ATOL:

Fiber Optics Technician
Fiber Optics Specialist in Testing and Maintenance
Fiber Optics Splicing Specialist

STAFF RECOMMENDATIONS:

Approve the addition of the above-listed training programs to the ATOL under the College of Central Florida which has been previously approved as an eligible training provider.

COMMITTEE ACTION:

Lanny Mathis made a motion to approve the nursing and fiber optics training programs. Jorge Martinez seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Career Center Committee, Thursday, May 18, 2023

TOPIC/ISSUE:

Approval of Galen College of Nursing (Gainesville Campus) as an eligible training provider AND approval of training programs.

BACKGROUND:

All education entities that wish to be listed on CareerSource CLM's Area Targeted Occupation List (ATOL) must submit a Training Provider Application that includes performance data for each of the training programs they would like listed on the ATOL pursuant to CLM policy *OPS-28 Area Targeted Occupation List*.

POINTS OF CONSIDERATION:

Galen College of Nursing (Gainesville Campus) has submitted the required documentation requesting the following training programs listed on the ATOL:

Associate Degree in Nursing Program, Two-Year Option
Associate Degree in Nursing Program, LPN/LVN to ADN Bridge Option
Baccalaureate Degree in Nursing Program, Prelicensure Option
Practical Nursing Program, 4-quarter Option

STAFF RECOMMENDATIONS:

Approve Galen College of Nursing (Gainesville Campus) as an approved training provider in LWDB 10 and add the above listed training programs to the ATOL.

COMMITTEE ACTION:

Lanny Mathis made a motion to approve the nursing and fiber optics training programs. Jorge Martinez seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Career Center Committee, Thursday, May 18, 2023

TOPIC/ISSUE:

Building Pathways to Infrastructure Jobs Grant Program

BACKGROUND:

The Department of Labor has released a notice of funding for grants designed to develop industry sector partnerships and training tracks for individuals in H1-B occupations. Grant applications are due by July 7, 2023. Grants may be awarded for several infrastructure occupations including broadband installation. Proposals may be for targeted demographics or rural areas.

POINTS OF CONSIDERATION:

We feel this grant is appropriate for Levy County and the surrounding areas (including parts of workforce regions 6 & 7) through regional planning and partnership.

This grant would be a partnership between three workforce regions, College of Central Florida, Central Florida Electric, and several contractors, contracted training providers and educational institutions in the other regions.

The grant is for a duration of five (5) years.

CSCLM will be taking acting as the lead agency for the grant and will heading up the proposal development.

STAFF RECOMMENDATIONS:

Proceed with grant proposal development with CSCLM as the lead agency for the grant.

COMMITTEE ACTION:

Jorge Martinez made a motion to approve proceeding with grant development. Lanny Mathis seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023 Marketing Committee, Wednesday, May 24, 2023

TOPIC/ISSUE:

Top Workplaces Project

BACKGROUND:

Top Workplaces is a free employer-recognition program designed to help bolster businesses' efforts to recruit and retain the right talent.

Based solely on employee feedback, captured by a research-backed employee engagement survey, the program helps organizations measure, shape, and showcase their culture to build a sustainable competitive edge. In addition to helping businesses get noticed and strengthen employer brand, Top Workplaces provides participating organizations with deeper culture insights, employee comments, and statements for important demographics such as DEI.

Directed by the Outreach Committee to explore the viability of Top Workplaces for the CLM region, staff met with the team from Energage (Top Workplaces) and representatives from the Ocala Human Resources Management Association, OHRMA, which is a chapter of the Society of Human Resource Managers (SHRM). A research study funded by the SHRM Foundation shows award-winning organizations excel at recruitment and retention.

POINTS OF CONSIDERATION:

- Participating organizations in our region need 35 or more employees.
- It was determined that Top Workplaces does not conflict with the "Best of" and "Readers' Choice" recognition programs conducted by area media that have members of the community/customers vote for their favorite businesses in a variety of categories. Those programs typically serve as a revenue-generating source for the outlet by charging businesses to get on the ballot and/or for promotional ads.
- Top Workplaces partners with media in major metropolitan areas - in Florida its Orlando, Jacksonville, Miami, Tampa, and Sarasota – to promote the program, host awards events, and provide additional advertising and coverage. Depending on the outlet, it can be used as a revenue source, such as by charging a license fee for the awards badge which Top Workplaces provides for free. Because the

CLM Market Service Area is not considered a major metro we are exploring whether CareerSource CLM could serve as Top Workplaces convener.

- OHRMA representatives expressed interest in the program and have been provided with more information. Next step is setting up a meeting with Energage to meet with their board and/or membership.
- The process is confidential; only those businesses named as Top Workplaces will be identified. However, insights are available to all participating organizations regardless of whether they are named a Top Workplace.
- While each participating organization receives workplace cultural benchmarks at no charge, businesses have the option to obtain further fee-based products/guidance from Energage.

STAFF RECOMMENDATIONS:

Direct staff to pursue partnership with Energage to bring Top Workplaces to the region as a strategy to further assist businesses find, hire, and retain employees. In addition to outreach, the program could include, but is not limited to, recognition events showcasing the area's Top Workplaces.

COMMITTEE ACTION:

John Murphy made a motion to move ahead with the Energage program. Kathy Judkins seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Consortium Meeting, Friday, April 14, 2023
Executive Meeting, Monday, April 10, 2023

TOPIC/ISSUE:

Area Re-designation; Board Certification

BACKGROUND:

WOA requires each workforce development area and Board to be recertified every two years.

POINTS OF CONSIDERATION:

The re-designation must be approved by the Consortium and the local Director.

STAFF RECOMMENDATIONS:

Request approval to sign the certification and submit it and the Board information to the Consortium for their approval.

COMMITTEE ACTION:

Executive Meeting - Al Jones made a motion to approve the recertification request for signatures. Jeff Chang seconded the motion. Motion carried.

Consortium Meeting - Commissioner Hodge made a motion to approve the recertification request for signatures. Commissioner Finegan seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Consortium Meeting, Friday, April 14, 2023
Executive Meeting, Monday, April 10, 2023

TOPIC/ISSUE:

Direct Service Provider Extension

BACKGROUND:

The Citrus Levy Marion Regional Workforce Development Board currently acts as the direct service provider for services made available through the One Stop career centers. We have been granted the ability to be the service provider (in lieu of contracting a provider) through a waiver granted by the governor through CareerSource Florida. This waiver must be renewed every three years and maintained through submission of an annual report at the beginning of each program year.

We have reached the end of the previous extension periods. A full waiver submission is required for program year beginning July 1, 2023.

POINTS OF CONSIDERATION:

The following request details the reasoning and aspects of our business that are positively impacted by direct service provision by the Citrus Levy Marion Regional Workforce Development Board.

STAFF RECOMMENDATIONS:

Approve submission of the attached Direct Services Provider Extension Request.

COMMITTEE ACTION:

Executive Meeting - Al Jones made a motion to approve the extension request for signatures. Pete Beasley seconded the motion. Motion carried.

Consortium Meeting - Commissioner Finegan made a motion to approve the extension request for signatures. Commissioner Hodge seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023

TOPIC/ISSUE:

Approval of the addition of the Withlacoochee Technical College to the Eligible Training Provider List and add training programs to the Area Targeted Occupation List.

BACKGROUND:

All education entities that wish programs to be listed on CareerSource CLM's Area Targeted Occupation List (ATOL) must submit a Training Provider Application that includes performance data for each of the training programs they would like listed on the ATOL pursuant to CLM policy *OPS-28 Area Targeted Occupation List*.

POINTS OF CONSIDERATION:

Withlacoochee Technical College has submitted the required documentation requesting the following training programs listed on the ATOL:

Applied CyberSecurity
Applied Information Technology
Automotive Service Technology
Correctional Officer
Crossover from Correctional Officer to Law Enforcement Officer
Crossover from Law Enforcement Officer to Correctional Officer
Electricity
Florida Law Enforcement Academy
Heating, Ventilation, Air-Condition/Refrigeration
Medical Assisting
Network Systems Administration
Nursing Assistant (Articulated)
Practical Nursing
Welding Technology

STAFF RECOMMENDATIONS:

Approve the addition of the above-listed training programs to the ATOL under Withlacoochee Technical College and approve them as an eligible training provider.

COMMITTEE ACTION:

Al Jones made a motion to approve the addition of the listed training programs provided through Withlacoochee Technical College. Fred Morgan seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.

DRAFT



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023

TOPIC/ISSUE:

Lobbyist Contract

BACKGROUND:

We engaged GR to assist us during the state Realignment process. It was felt that we needed very specific services to promote our remaining as a workforce region of Citrus Levy and Marion Counties. FWDA, the state workforce association, has a lobbyist that provides "system" lobbying services. They do not represent individual region issues, so that was the primary reason that we chose GR.

The contract for the year ending June 30 was at a rate of \$5,000 per month plus expenses such as lobbyist registration and travel.

The proposed renewal would be for monitoring services and limited assistance and is at the reduced rate of \$2,000 per month plus expenses as note above.

Lobbying expenses cannot be charged to our federal grants so, like the current contract, funding would need to come from our Unrestricted funds.

POINTS OF CONSIDERATION:

While there are two phases remaining in Realignment- system improvements and regional planning, neither of these pose a threat to our local area.

STAFF RECOMMENDATIONS:

-

COMMITTEE ACTION:

Al Jones made a motion to not renew the contract with Gray Robinson. Kim Baxley seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023

TOPIC/ISSUE:

By-Laws Amendment

BACKGROUND:

The REACH Act limits board member terms to eight consecutive years.

POINTS OF CONSIDERATION:

The term limitation is not currently in the By-Laws. This amendment brings our By-Laws into compliance with State law.

STAFF RECOMMENDATIONS:

Approve amendment.

COMMITTEE ACTION:

Al Jones made a motion to approve the amendment of the By-Laws for the addition of terms limits. Kim Baxley seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023

TOPIC/ISSUE:

Monthly Statement Reconciliation

BACKGROUND:

During the 2021-2022 DEO Financial Monitoring, it was noted under Technical Assistance CSCLM should include a time frame by which monthly bank reconciliations are to be completed for financial consistency and accountability. This was not considered a finding or non-compliance issue.

POINTS OF CONSIDERATION:

This policy will not supersede existing policies but will provide an overview of procedures and expectations CSCLM staff will use for thorough and consistent reconciliation of all bank statements and activity.

STAFF RECOMMENDATIONS:

Approve Monthly Statement Reconciliation (FIN-10) in accordance with Technical Assistance suggestion posed by DEO.

COMMITTEE ACTION:

Al Jones made a motion to accept the monthly statement reconciliation policy (Fin-10). Charles Harris seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023

TOPIC/ISSUE:

Educational Assistance

BACKGROUND:

Our current educational assistance policy only includes tuition reimbursement for traditional degree programs that are relevant to an employee's job duties.

Specialized credentials are a valuable asset to the organization and provisions should be made to allow staff to pursue certification in specialty areas to enhance the effectiveness and efficiency of the organization.

POINTS OF CONSIDERATION:

- A. CLMRWDB will reimburse One Hundred Percent (100%) of all training, preparatory, or tuition costs and application and testing fees associated with certification programs that are:
 1. Professional designations that require continued education to maintain such designation.
 2. Occupationally or industry relevant to the employee's job duties or projected future work assignment.
 3. Provided by an institution of higher education, school system or another training provider that is recognized or endorsed by the certifying body.
- B. Reimbursement of costs shall be limited to those costs associated with attainment of the knowledge and required processes necessary to obtain certification.
 1. Ongoing re-certification costs may be reimbursed as long as the certification remains relevant to the employee's position or future work assignment and are approved by the Chief Executive Officer (CEO) or Executive Vice President (EVP) dependent on funding availability.
 2. Professional membership fees (annual or otherwise) will not be considered for reimbursement unless approved in advance by the CEO or EVP and are directly related to the execution of the employee's job duties, future work assignments and/or provide direct benefit to CLMRWDB.

STAFF RECOMMENDATIONS:

Approve the addition of certification costs to our existing educational assistance policy.

COMMITTEE ACTION:

Charles Harris made a motion to approve the addition of certification costs to the existing CLM educational assistance policy. Kim Baxley seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023

TOPIC/ISSUE:

Staff telework flex days

BACKGROUND:

Telework flex days were added as a benefit to all CSCLM staff in June of 2021. This benefit has proven to be successful and very helpful to staff while allowing more flexibility to our business model. The first iteration of this policy required staff to use Telework in 8-hour increments. This was designed to avoid issues with commute times, lunch periods, etc. We now wish to further improve the policy by allowing staff to use Telework in 4-hour increments under a structured scheduling pattern.

POINTS OF CONSIDERATION:

- Telework hours may be taken in 4-hour increments to cover the work hours of 8:00am to 12:00pm or 1:00pm to 5:00pm
- Commuting time between in-office and telework hours is unpaid and will occur during the employee's unpaid lunch break.
- When Telework hours are combined with in-office hours the employee's unpaid lunch break must be taken between the hours of 12:00pm and 1:00pm.

STAFF RECOMMENDATIONS:

Approve modification of the existing Telework policy to allow use of Telework hours in 4-hour increments.

COMMITTEE ACTION:

Al Jones made a motion to approve the modification of the existing telework policy. Jeff Chang seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023

TOPIC/ISSUE:

Emergency Paid Sick Leave Elimination

BACKGROUND:

The Family First Coronavirus Response Act (FFCRA) and the American Rescue Plan Act of 2021 had authorized certain employers to provide paid sick leave to individuals affected by Covid-19. This benefit could be applied to any employee that could not work due to being a caregiver for a sick family member, personal illness and side effects from receiving an approved vaccine.

CSCLM opted to offer emergency paid sick leave to staff under this policy modeled closely after the FFCRA sick leave allowance.

POINTS OF CONSIDERATION:

As health mandates and precautions wind down from the pandemic we feel this additional benefit is no longer needed. We would like to retract **OPS-84 Supplemental Guidance** that authorized the use of emergency paid sick leave. This retraction would be effective on July 1, 2023.

STAFF RECOMMENDATIONS:

Retract **OPS-84 Supplemental Guidance** that permitted additional emergency paid sick leave for staff members.

COMMITTEE ACTION:

Al Jones made a motion to retract OPS-84. Charles Harris seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023
Career Center Committee, Thursday, May 18, 2023

TOPIC/ISSUE:

One Stop Operator Procurement and Contracting

BACKGROUND:

Procurement of a One Stop Operator is a requirement under the Workforce Innovation and Opportunity Act. Since the termination of the OSO contract with Thomas P. Miller & Associates in November 2022, CareerSource has been acting as the One Stop Operator until such time the REACH Act and Realignment had been finalized. An ITN was issued on March 9, 2023, with Expression of Interest due on March 23, 2023. Due to no response, the ITN was re-issued April 6, 2023. Southern Indiana Works responded with the Expression of Interest on 4/12/23 and proposal on May 4, 2023. There were no other responses received.

POINTS OF CONSIDERATION:

Tony Waterson, President & CEO of Southern Indiana Works and Kristen Barry, Consultant to Southern Indiana Works have 25 years' combined experience in workforce development. Tony and Kristen have also served in this role previously for CSCLM. This will provide an existing knowledge of the region, the three career centers and many of the staff members.

STAFF RECOMMENDATIONS:

Approve the sole source selection of Southern Indiana Works to provide One Stop Operator duties for CareerSource CLM beginning July 1, 2023, through June 30, 2024 with a renewal review each year up to June 30, 2027.

COMMITTEE ACTION:

Career Center - Jorge Martinez made a motion to approve the contract with Southern Indiana Works as One Stop Operator. Lanny Mathis seconded the motion. Motion carried.

Executive – Al Jones made a motion to approve the contract with Southern Indiana Works as One Stop Operator through sole source selection. Jeff Chang seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023

TOPIC/ISSUE:

Annual benefits renewal.

BACKGROUND:

The annual health insurance renewal is July 1, 2023. Renewal rates were received through Two-Twelve Benefits.

Florida Blue presented rates that average a 5.04% decrease in comparison with PY21 when we last had FB as a provider. We feel that these rates are reasonable based on an increase of 49% presented by our current carrier United Healthcare.

The base contribution toward each employee's benefits will be increased from \$567.30 (UHC Base Contribution) to \$571.17 with Florida Blue. This is a 0.68% increase in the employer funded part.

All plan costs over the baseline employer contribution amount will be paid by the employee. The baseline contribution amount is variable based on the premium increases and has been calculated to keep plan costs/value fair across all plans.

POINTS OF CONSIDERATION:

- The company paid Principal Dental plan rates stayed the same.
- Company paid Principal Group Life Rates Increased by 10.9% (\$139.20 Annual Cost Increase) the renewal is calling for a 10.9% increase due to the following:
 - a) *Demo Change – Lost (3) enrolled lives, gender ratio changed by 4%, natural aging of the group.*
 - b) *6% Risk Adjustment, meaning current rates do not match the current risk of the group.*
 - c) *The last 2 years the full increases on the Life have been waived.*
- Company paid Principal Short-Term disability rates stay the same.
- The company paid Principal dependent Life rates stay the same.
- The company paid Principal Vision plan rates stay the same.

STAFF RECOMMENDATIONS:

Our recommendation is that we contract with Florida Blue for the five (5) options listed below:

1. 128/129 HSA –The monthly company share of the premium will be \$590.70. This plan will be offered at \$0.00 cost to the employee.
2. Blue Options 5302 – a PPO plan with a monthly rate of \$571.17. This plan will be used as the baseline employer contribution amount for the remaining plans. This plan will be offered at \$0.00 cost to the employee.
3. Blue Care 47 – an HMO plan. We recommend the company pay the baseline amount of \$571.17. Monthly employee contribution will be \$189.10.
4. Blue Care 60 – an HMO plan. We recommend the company pay the baseline amount of \$571.17. Monthly employee contribution will be \$267.03.
5. Blue Options 3566 – a PPO plan. We recommend the company pay the baseline amount of \$571.17. Monthly employee contribution will be \$121.91.
6. Continue with all Principal plans as currently contracted – minor changes as shown on the attached spreadsheet.

COMMITTEE ACTION:

Kim Baxley made a motion to accept the proposed annual healthcare renewal. Fred Morgan seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023

TOPIC/ISSUE:

Subgrantee Agreement Compliance- Schedule of Operations

BACKGROUND:

The Subgrantee Agreement calls for certain approvals by the Board.

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

POINTS OF CONSIDERATION:

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

CLM has 11 holiday closures, the same number as the federal schedule, except that instead of Washington's Birthday and Columbus Day, CLM has the Friday after thanksgiving and Christmas Eve.

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

STAFF RECOMMENDATIONS:

Adopt the Federal Holiday Schedule, with the following deviation: substitute the Friday after Thanksgiving and Christmas Eve for Washington's Birthday and Columbus Day.

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

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

COMMITTEE ACTION:

Charles Harris made a motion to approve the 2023-2024 Schedule of Operations. Kim Baxley seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023

TOPIC/ISSUE:

Regional Planning Partnership Procurement

BACKGROUND:

The Ernst & Young report to CareerSource Florida makes a recommendation that local workforce boards look to regional planning involving two or more local workforce boards. The regional planning partnership is a collaboration with the Citrus County Chamber for building a talent stream to support its economic development goals to local business and government leaders. A release of a request for proposal to procure an organization to assist in this process on 4/6/2023. The RFP closed on 4/14/2023. Two proposals were received.

Staff met on 4/21/2023 to review and score each proposal. The initial review and scoring resulted in the following.

Regional Planning RFP	
Scoring Matrix Results - Max Points = 60	
Company	Aggregate Score
Insytanalytics	49.83
Lightcast	27.67

POINTS OF CONSIDERATION:

Based on scoring the overall scoring matrix, Insytanalytics met all the requirements and a meeting via Zoom was held on 5/4/2023. The cost for the regional planning study is \$24,000 plus \$2,000 for travel.

STAFF RECOMMENDATIONS:

Approve the procurement of Insytanalytics for the Regional Planning Partnership.

COMMITTEE ACTION:

Al Jones made a motion to approve the procurement of of Insytanalytics for the Regional Planning Partnership. Fred Morgan seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023

TOPIC/ISSUE:

Independent Monitoring Services RFP

BACKGROUND:

In our effort to maintain consistent transparency, we wish to maintain a 3rd party to monitor programmatic, administrative and board governance areas. This monitoring will include a review of our general business practices, organizational structure and authority, business services, service delivery and participant eligibility, support services administration and contracting and procurement. The current contract with Underwood Sloan and Associates expires 6/30/2023. We will need to put forth a Request for Proposals (RFP) for competitive procurement of an outside monitoring firm to conduct these services. This firm will provide a full report of their review to the Executive Committee and Board. Our intent is to conduct ongoing reviews bi-annually and annually.

POINTS OF CONSIDERATION:

This RFP will solicit proposals for a new contractor to provide these additional services to our existing internal monitoring processes.

STAFF RECOMMENDATIONS:

Approve release of a Request for Proposals for Independent Monitoring Services.

COMMITTEE ACTION:

Kim Baxley made a motion to approve the release of the Request for Proposals for independent monitoring services. Al Jones seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023

TOPIC/ISSUE:

Workforce Champion Nomination

BACKGROUND:

Our recognition program underwent several changes as a result of last year's employee survey. One of those changes was for the Executive Committee/Board to make the final selection of our Workforce Champion that will be recognized during the 2023 Workforce Professional Summit in Orlando Florida September 18-20.

POINTS OF CONSIDERATION:

Our center managers have nominated two staff members and have recorded their nominations for the review by the Executive Committee.

STAFF RECOMMENDATIONS:

Executive Committee members are asked to make a selection from the two presentations provided.

COMMITTEE ACTION:

Al Jones made a motion to select Jerry Flanders as the 2023 Workforce Champion. Charles Harris seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023

TOPIC/ISSUE:

Form 990 Return of Organization Exempt from Income Tax for program year 7/1/21-6/30/22.

BACKGROUND:

POINTS OF CONSIDERATION:

Form 990 was completed by our auditors Powell and Jones, CPAs after the financial statements were audited.

STAFF RECOMMENDATIONS:

Approve Form 990

COMMITTEE ACTION:

Al Jones made a motion to approve the Form 990 for program year 2021-2022. Kim Baxley seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023

TOPIC/ISSUE:

Staff Retention Incentives

BACKGROUND:

It is customary that we try to give all employees a minimum of 3% cost of living adjustment each program year. However, we received an overall budget reduction of 11% this program year restricting our ability to increase payroll costs.

POINTS OF CONSIDERATION:

We would like to provide all CLM staff with a one-time retention incentive equivalent to 3% of their current annual salary. This incentive would be paid from our current balance of unrestricted funds and will only be done so after final budget figures are received from the State, a final budget is developed, and it is decided by the CEO and EVP that proceeding with the incentives is feasible at that time. This is anticipated to occur in mid to late July or August. The expected cost of incentives is \$79,094.00.

STAFF RECOMMENDATIONS:

Permit sr. management to provide retention incentives to staff at a rate of 3% of their annual salary.

COMMITTEE ACTION:

Kim Baxley made a motion to permit senior management to provide retention incentives to staff at a rate of 3%-5% of their annual salary. Al Jones seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.



RECORD OF ACTION/APPROVAL

Board Meeting, Wednesday, June 7, 2023
Executive Committee, Wednesday, May 31, 2023

TOPIC/ISSUE:

Severance pay

BACKGROUND:

We are looking at restructuring our staffing model due to budget concerns stemming from a projected 11% decrease in formula funding.

POINTS OF CONSIDERATION:

Staffing reductions may need to occur due to continued decline in funding and increased focus on business-driven services. Should reductions occur we would like to provide any affected staff with severance pay equal to four (4) weeks of their current wage. All severance pay will be provided in lump sum in the staff's final pay cycle.

- Full-time staff will receive an amount equal to 160 hours.
- Part-time staff will receive an amount equal to 96 hours (based on average hours worked for part-time positions).
- All staff impacted will be placed on administrative leave and paid through the end of the current pay period in which the reduction occurs.
- Severance payments will be made on the staff member's final pay statement.

STAFF RECOMMENDATIONS:

Approve paid administrative leave and severance pay for any staff affected by reductions as detailed above.

COMMITTEE ACTION:

Al Jones made a motion to approve the paid administrative leave and severance pay for any staff affected by reductions and to incorporate this policy into the employee handbook. Charles Harris seconded the motion. Motion carried.

BOARD ACTION:

This item appeared on the board agenda as a consent agenda item. Mark Paugh made a motion to approve the Performance and Monitoring, Career Center, Marketing and Outreach, and Executive committee consent agenda items. John Murphy seconded the motion. Motion carried.

Citrus, Levy, Marion Counties

Commuter Pattern and Occupational Overlap

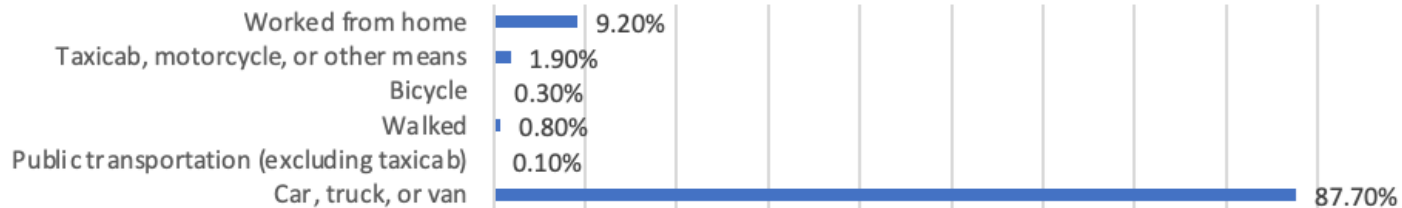
Commuting Patterns

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

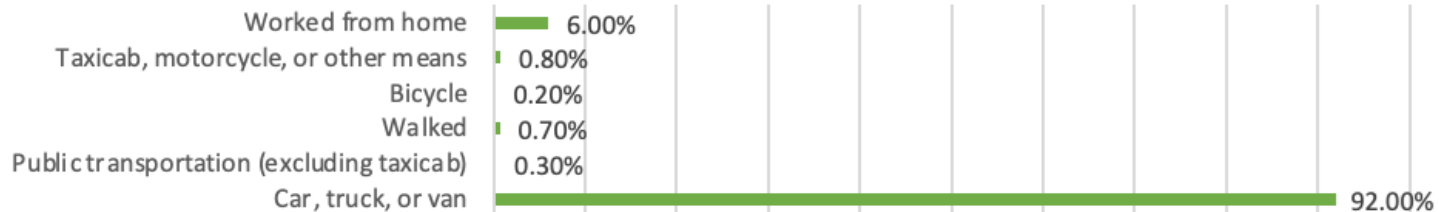
	Citrus County	Levy County	Marion County
Worked in state of residence	98.70%	99.60%	99.10%
Worked in county of residence	75.30%	42.70%	80.50%
Worked outside county of residence	23.40%	56.90%	18.60%

Mode of Commute

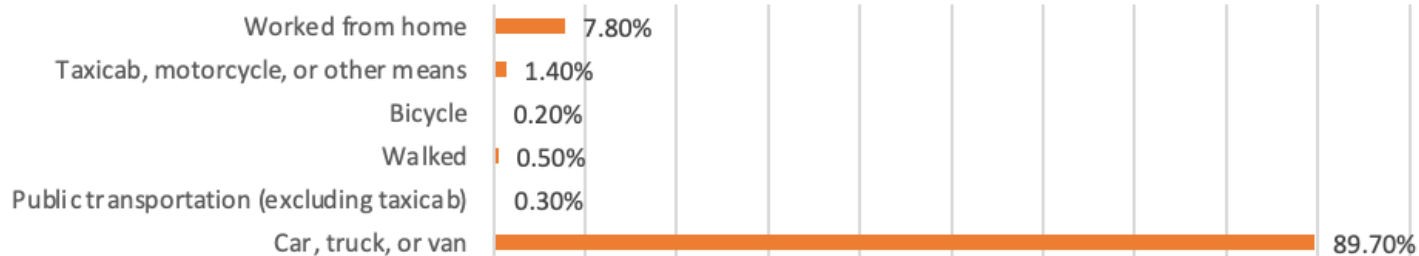
Citrus County



Levy County

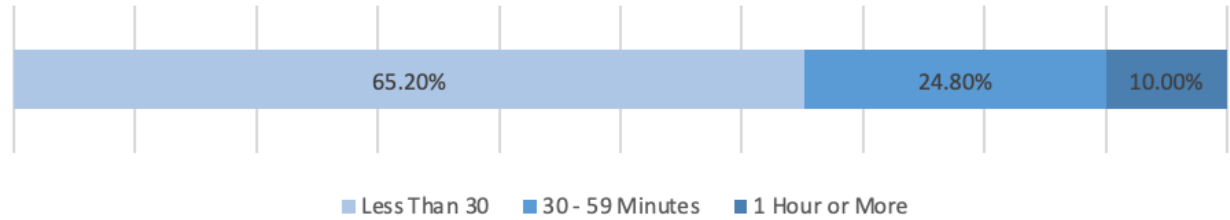


Marion County

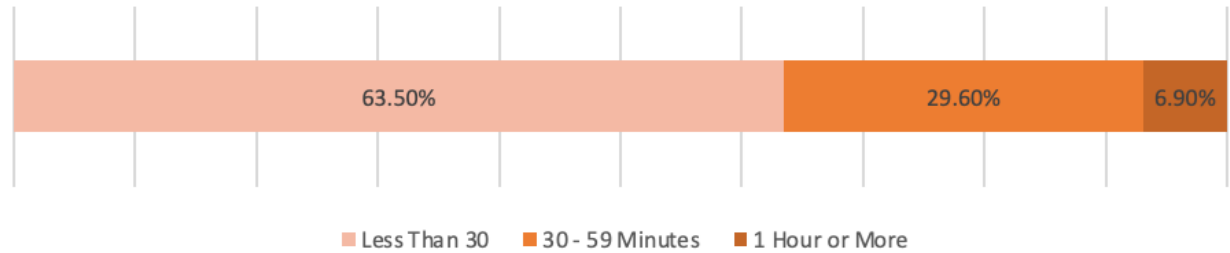


Length of Commute

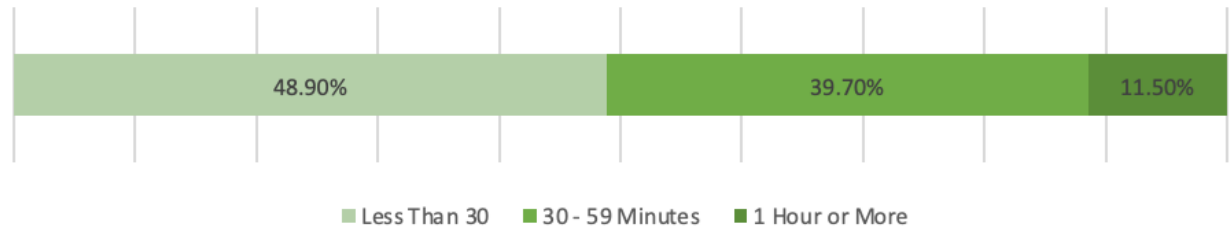
Citrus County



Marion County



Levy County



Main Takeaways

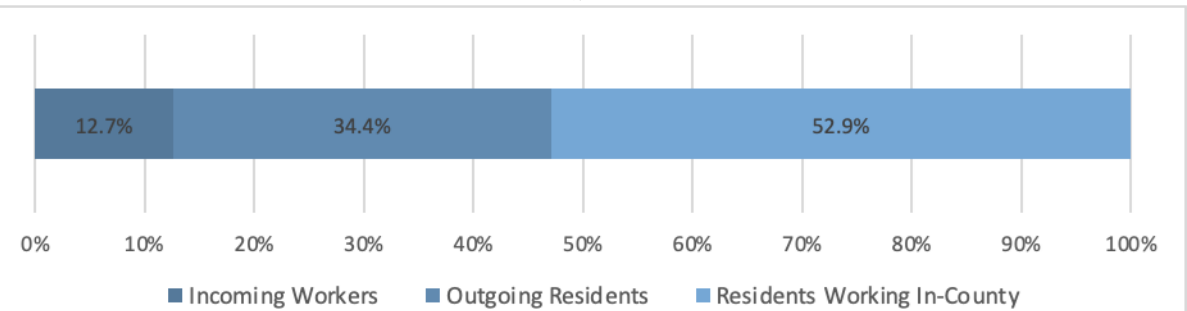
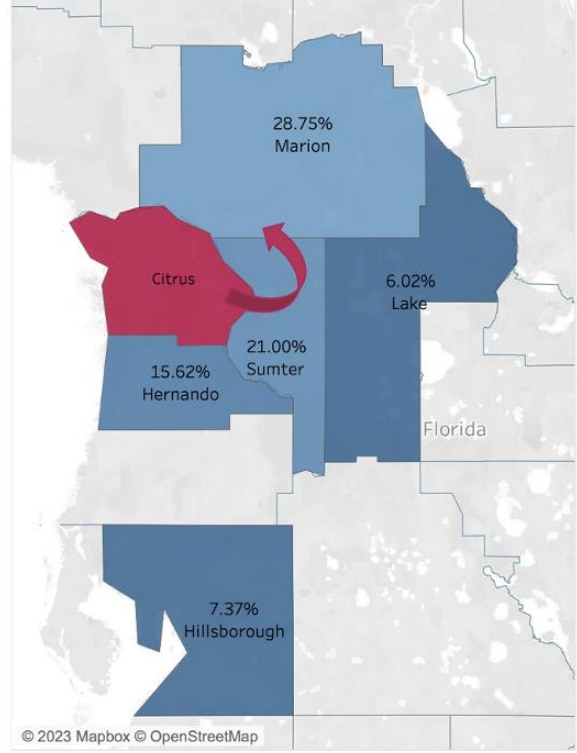
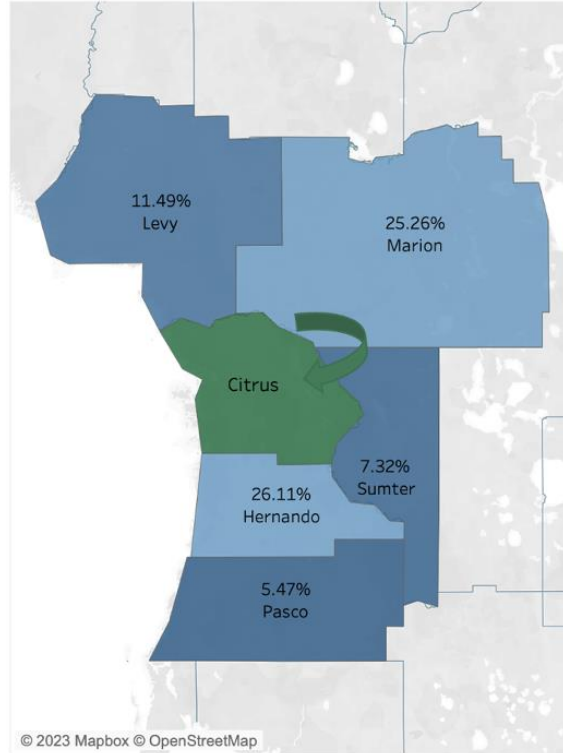
- Most in Citrus, Levy, and Marion commute by car, truck or van
- Between 6 and 9.2 percent work from home
- Average commute time < 30 minutes, but many spend 30-60 minutes, particularly Levy county
- 75.3 percent of Citrus residents don't leave their county for work, 80.5 percent for Marion, and 42.7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

Inflow and Outflow From Citrus, Levy, and Marion

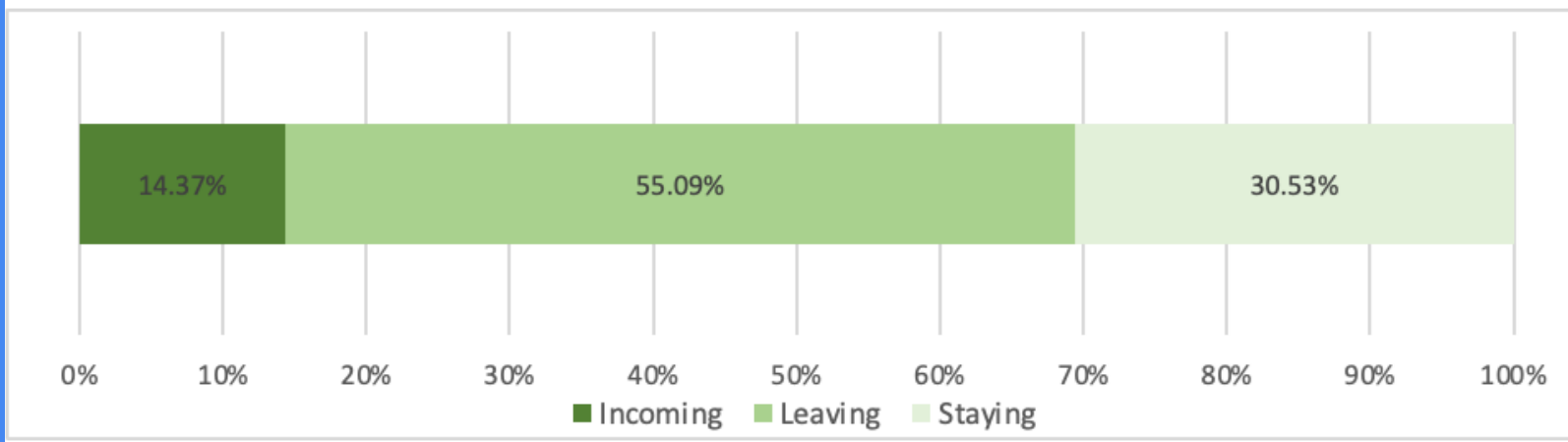
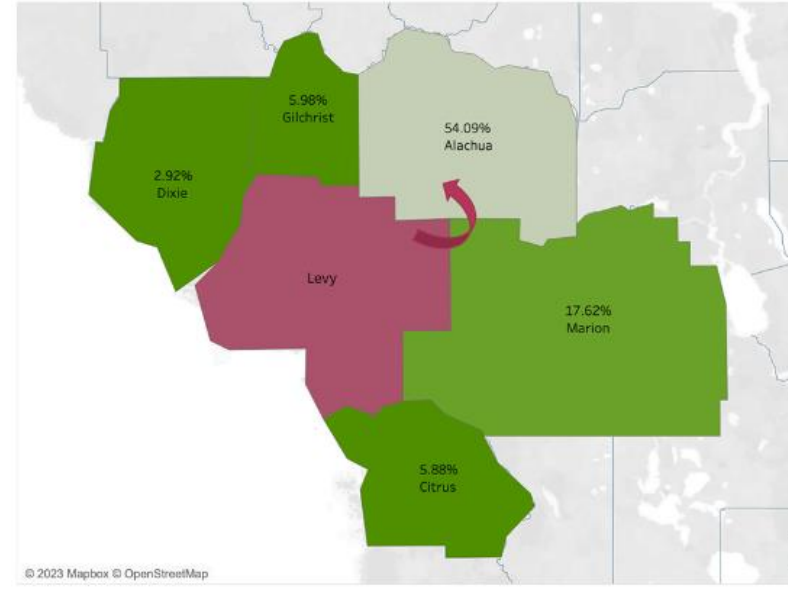
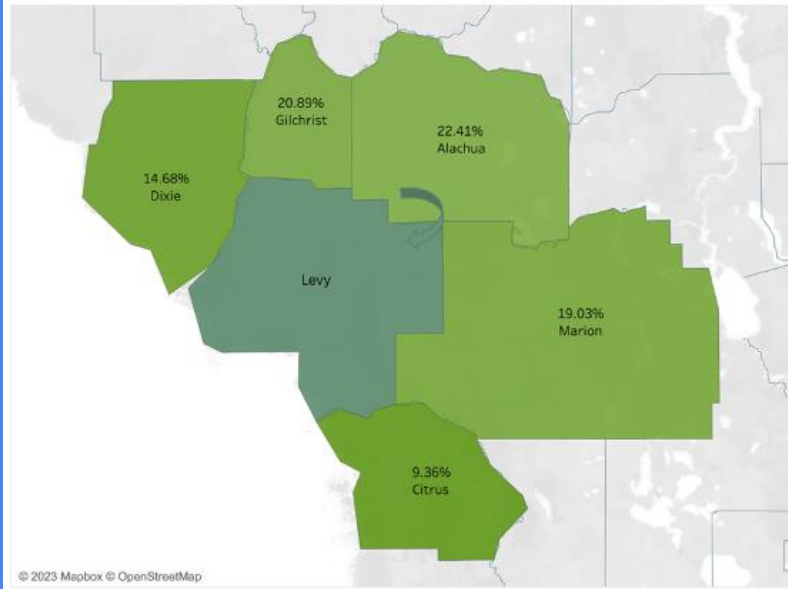
An analysis of where workers are finding their employment.

- 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

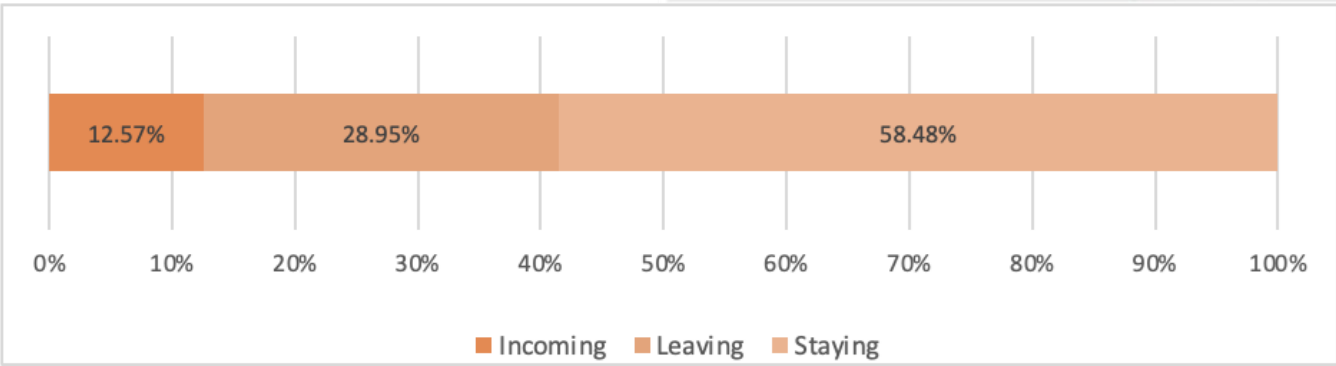
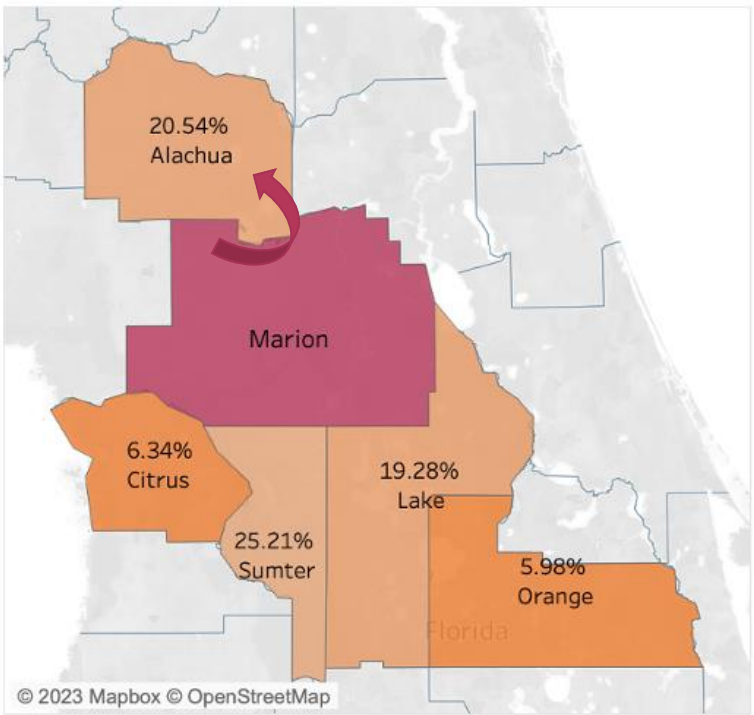
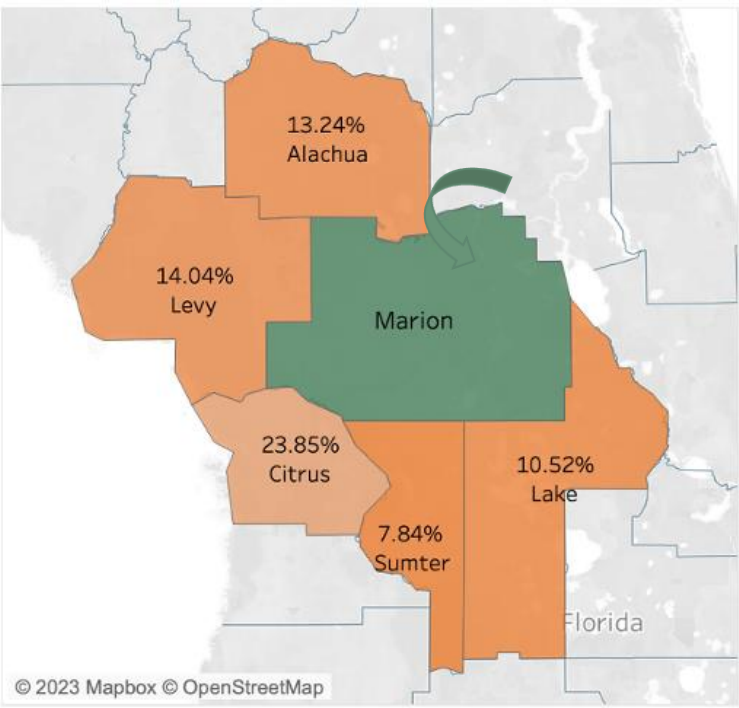
Top Inflow and Outflow Counties for Citrus



Top Inflow and Outflow Counties for Levy



Top Inflow and Outflow Counties for Marion

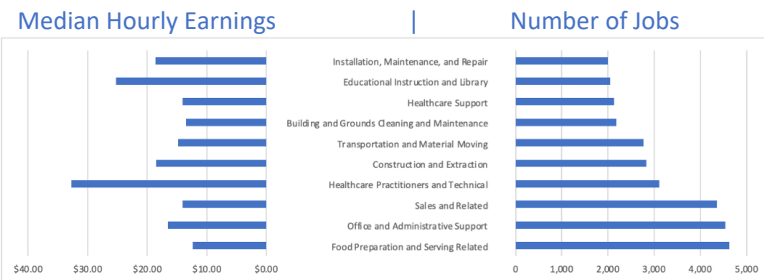


Main Takeaways

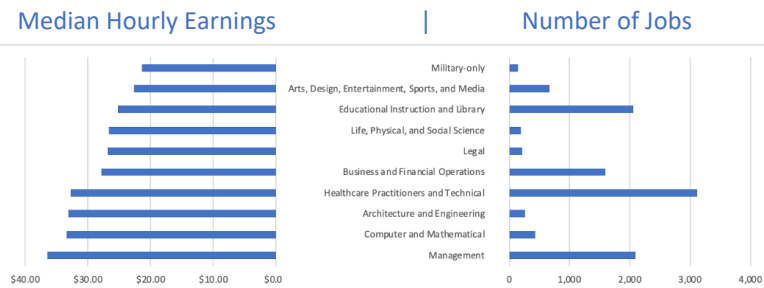
- Citrus and Levy have a large inflow and outflow to/from Marion
- Other important inflow/outflow counties include Hernando, Sumter, Alachua, Gilchrist, and Lake
- The majority work in-county in Marion and Citrus, but not in Levy

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

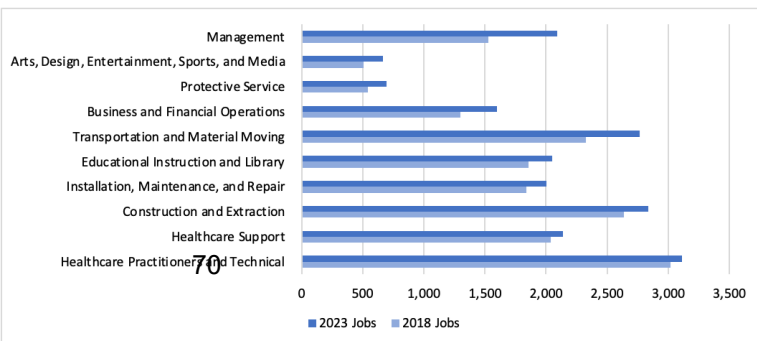
Largest Occupations (2018-2023)



Highest Paying Occupations (2018-2023)

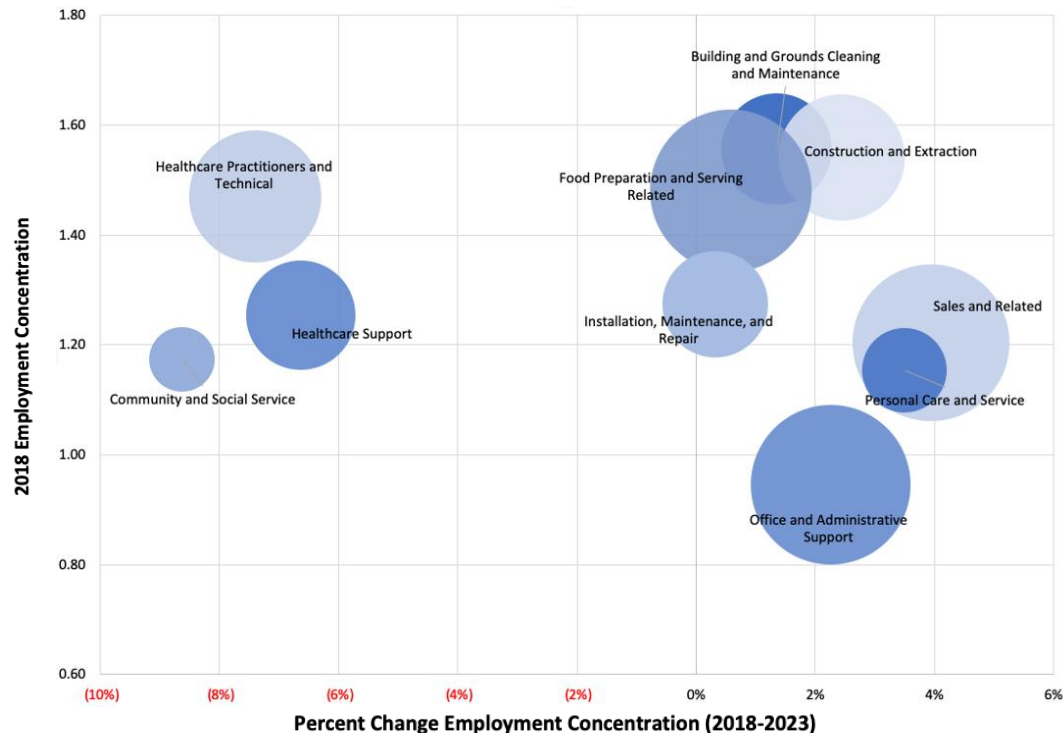


Fastest Growing Occupations (2018-2023)



Citrus County

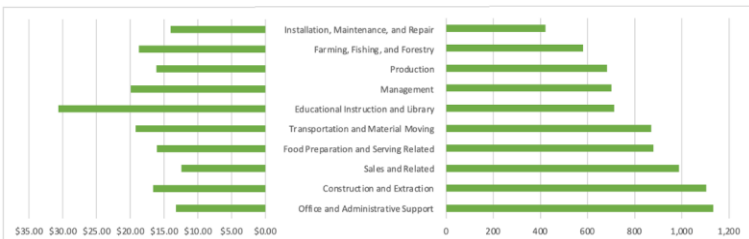
Highest Occupation Employment Concentration



Largest Occupations (2018-2023)

Median Hourly Earnings

Number of Jobs



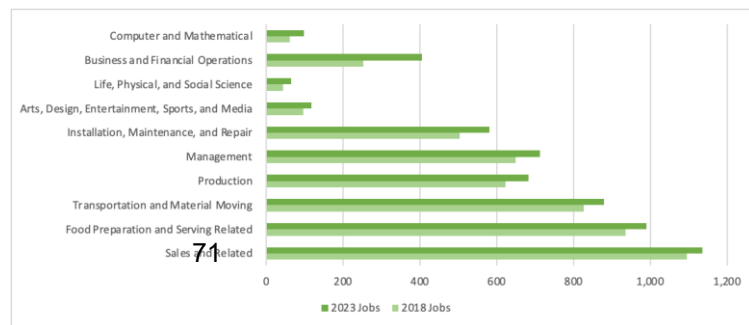
Highest Paying Occupations (2018-2023)

Median Hourly Earnings

Number of Jobs

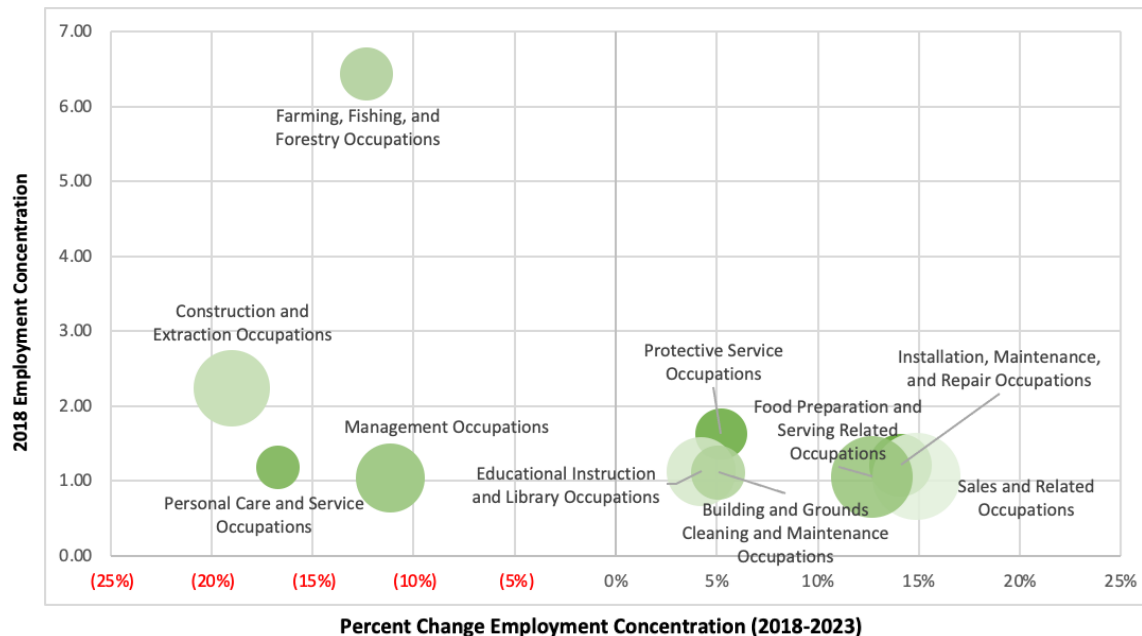


Fastest Growing Occupations (2018-2023)

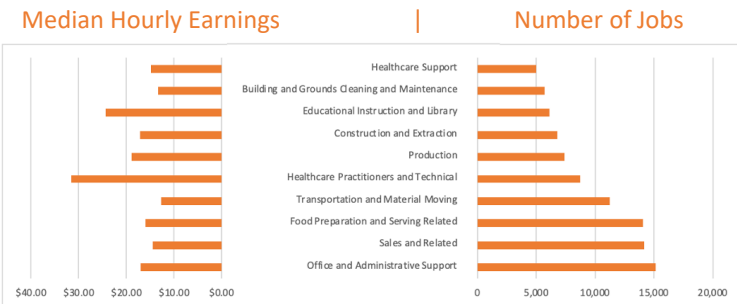


Levy County

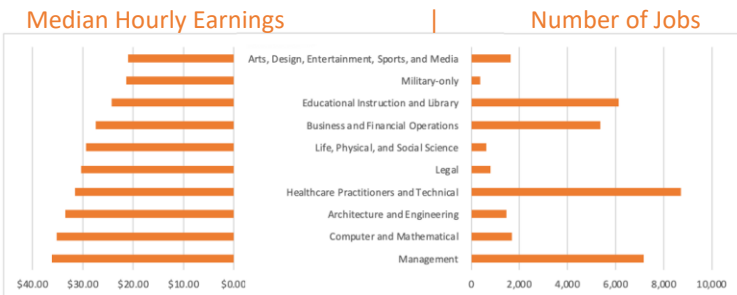
Highest Occupation Employment Concentration



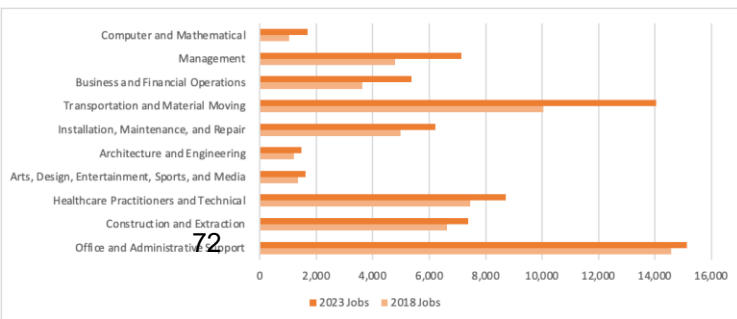
Largest Occupations (2018-2023)



Highest Paying Occupations (2018-2023)

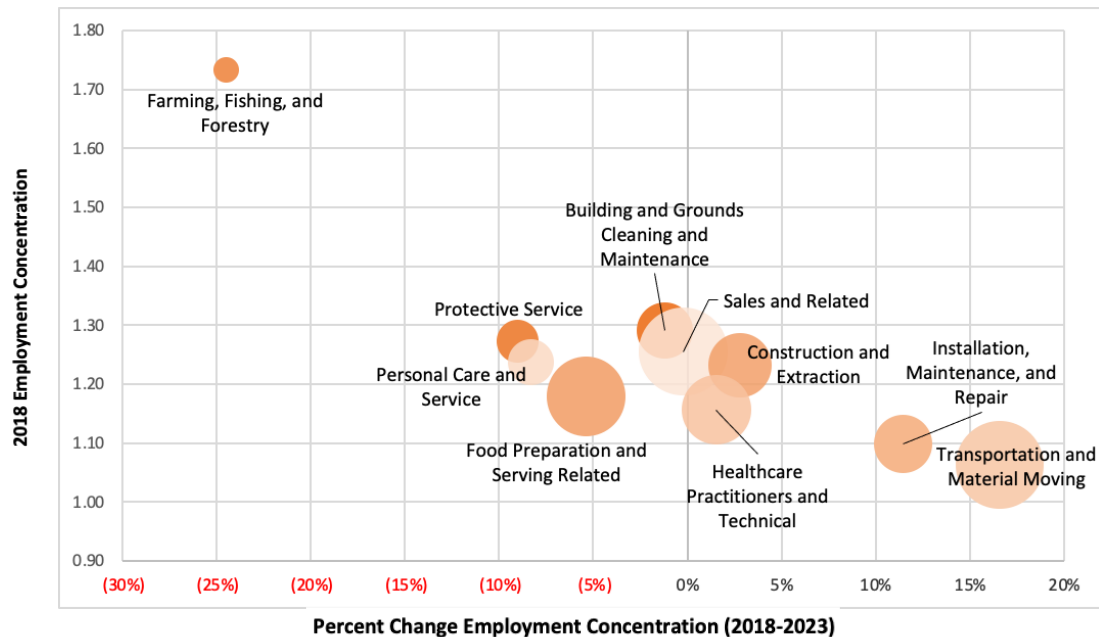


Fastest Growing Occupations (2018-2023)



Marion County

Highest Occupation Employment Concentration

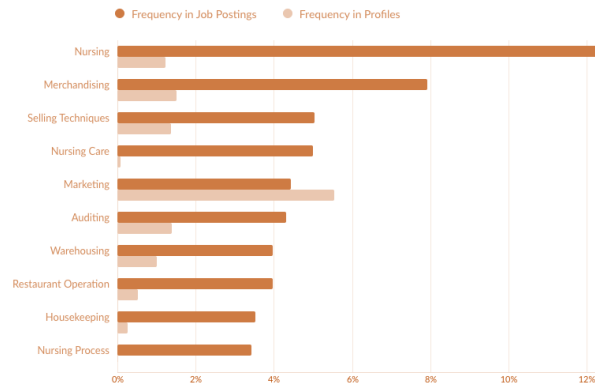


Specialized Skills In Job Postings

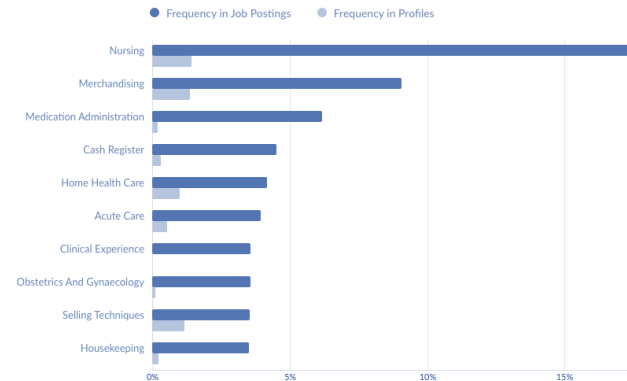
Levy



Marion



Citrus

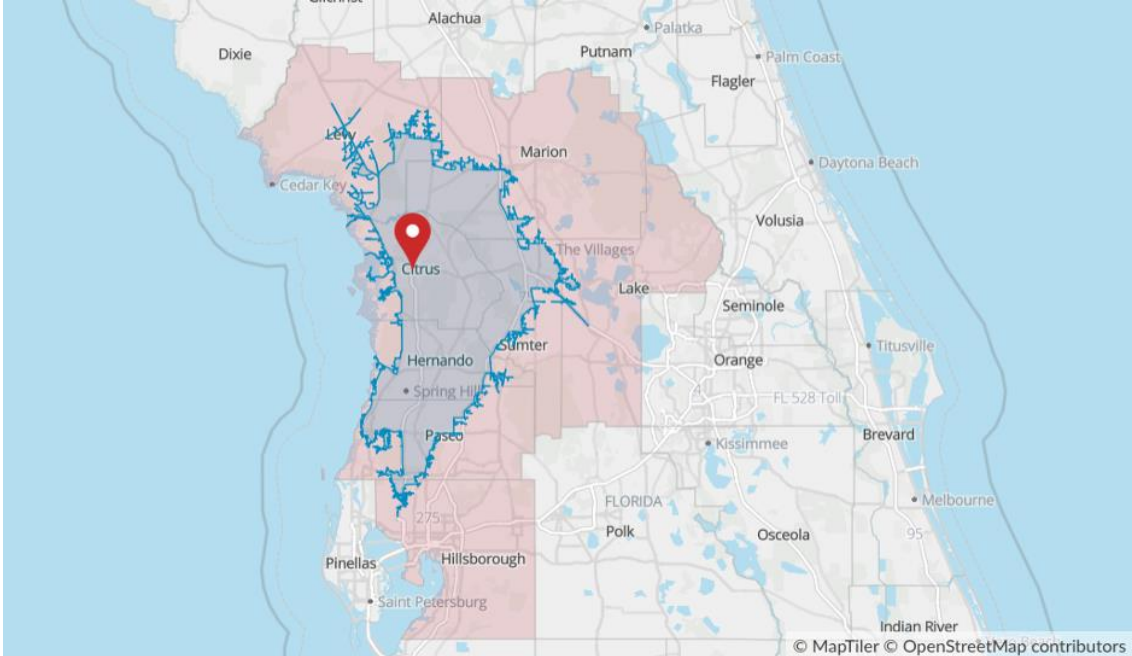


Top Occupations Within a 60 Minute Drive Time

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

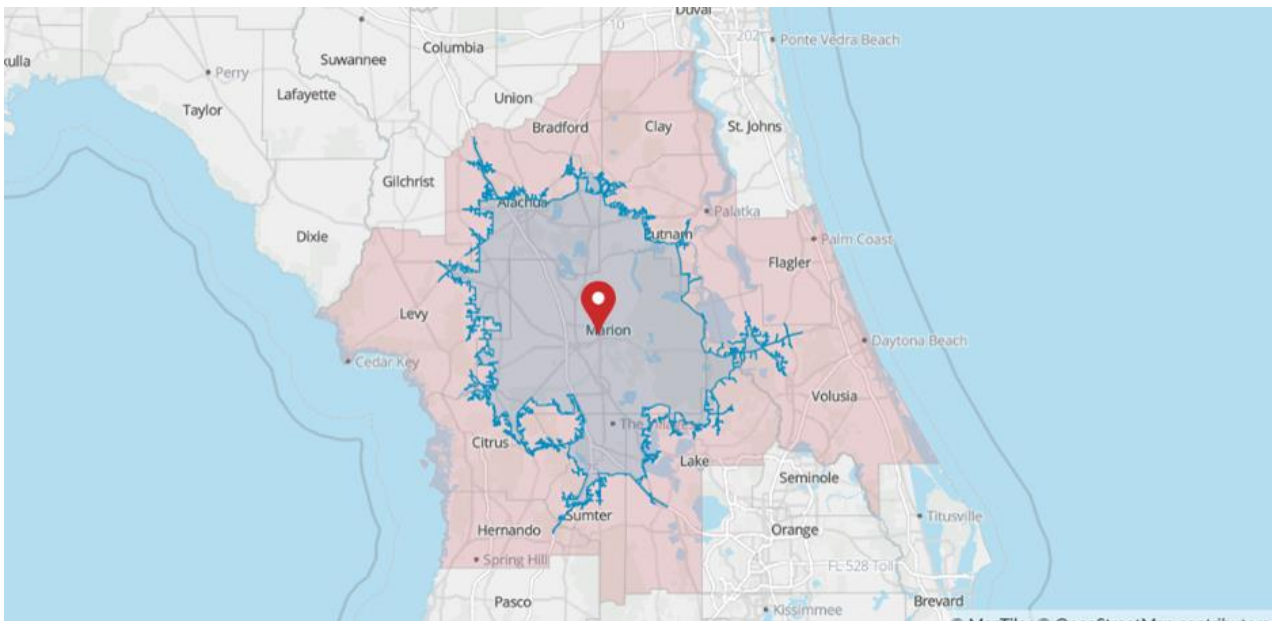
- Retail Salespersons
- Customer Service Representatives
- Stockers and Order Fillers
- Registered Nurses
- Cashiers, Office Clerks, General
- General and Operations Managers
- Fast Food and Counter Workers
- Waiters and Waitresses

Citrus: Top Occupations Within 60 Minute Commute



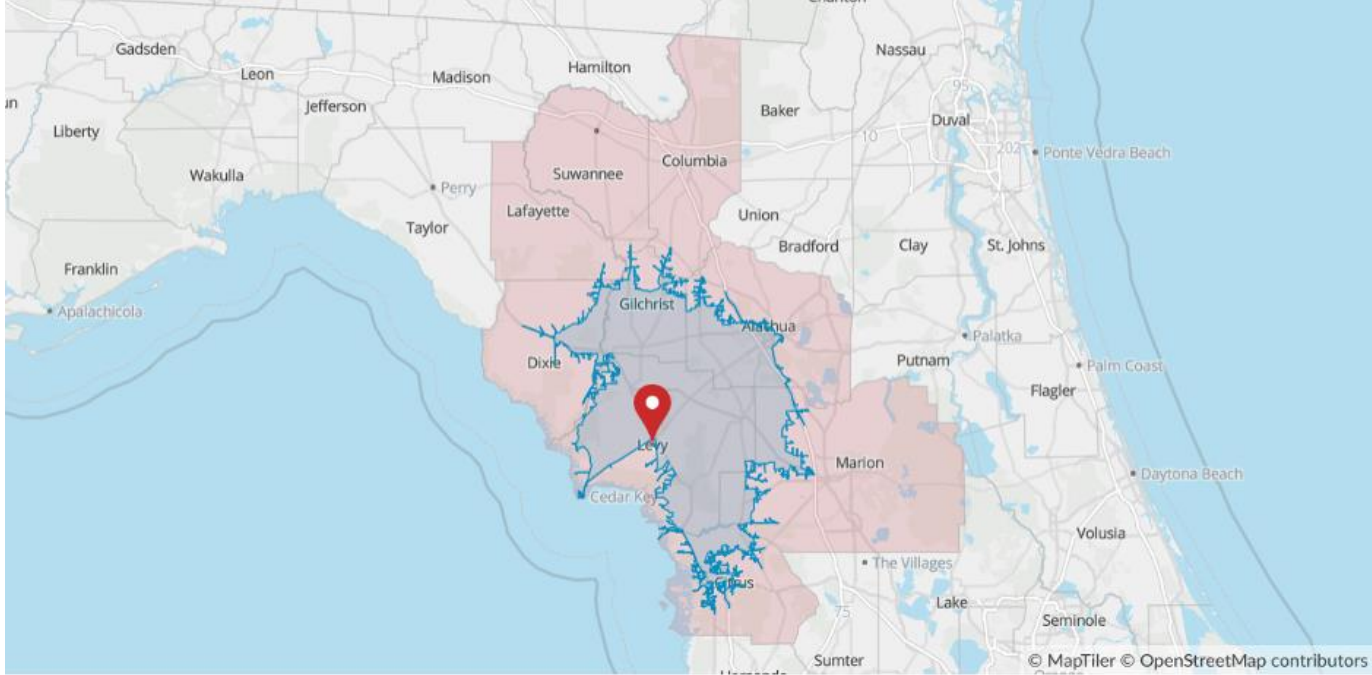
Description	2023 Jobs	COL Adjusted Median Annual Earnings
Retail Salespersons	40,303	\$28,705
Customer Service Representatives	36,882	\$37,554
Stockers and Order Fillers	34,528	\$31,912
Registered Nurses	30,372	\$75,781
Cashiers	29,942	\$25,775
Office Clerks, General	27,436	\$37,866
General and Operations 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

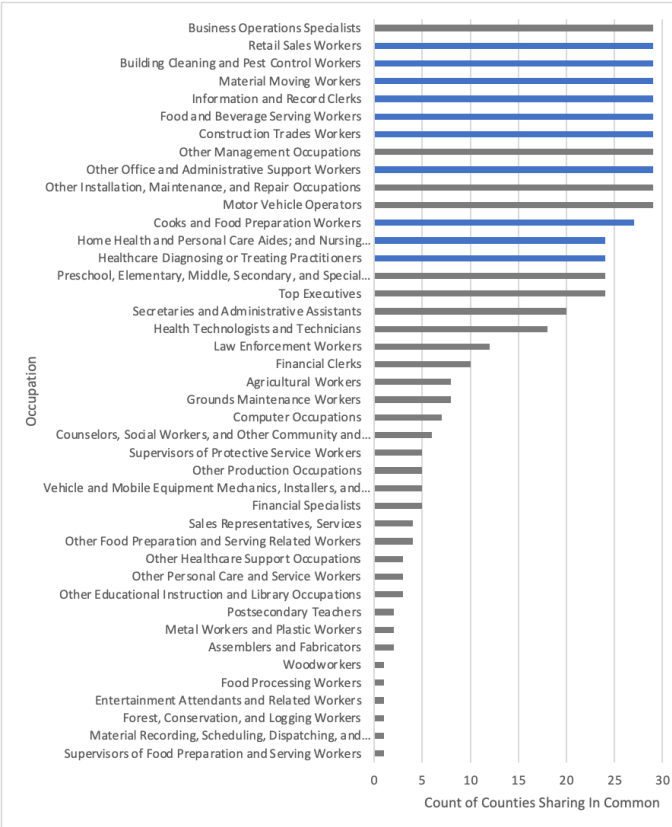
Levy: Top Occupations Within 60 Minute Commute



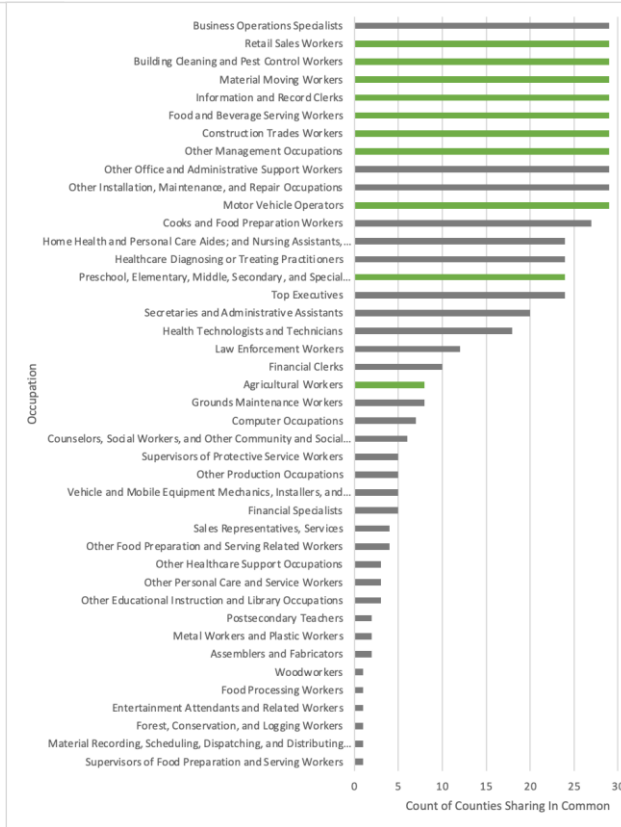
Description	2023 Jobs	COL Adjusted Median Annual Earnings
Retail Salespersons	11,084	\$28,782
Registered Nurses	10,670	\$74,499
Stockers and Order Fillers	9,065	\$32,168
Cashiers	8,980	\$25,840
Fast Food and Counter Workers	8,671	\$24,502
Office Clerks, General	8,079	\$36,421
Postsecondary Teachers	7,314	\$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

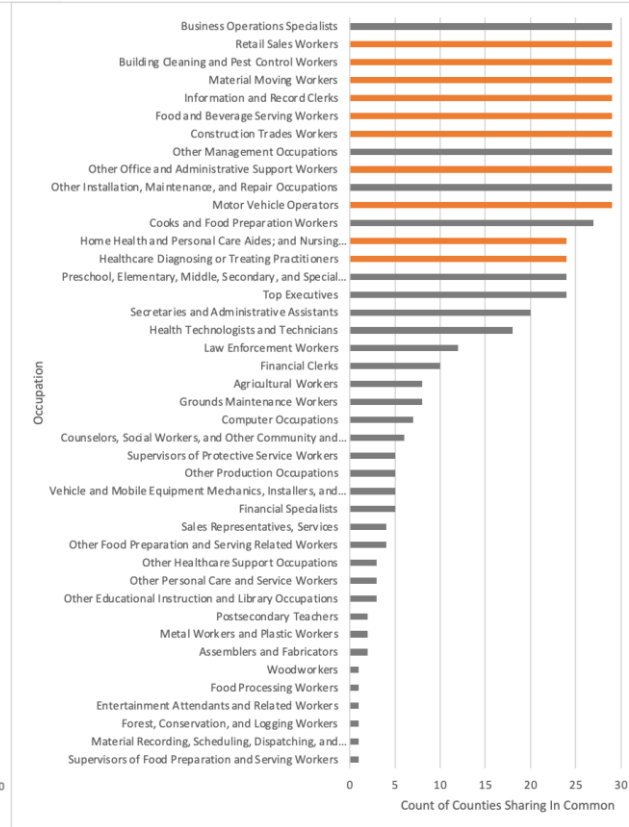
Citrus



Levy



Marion



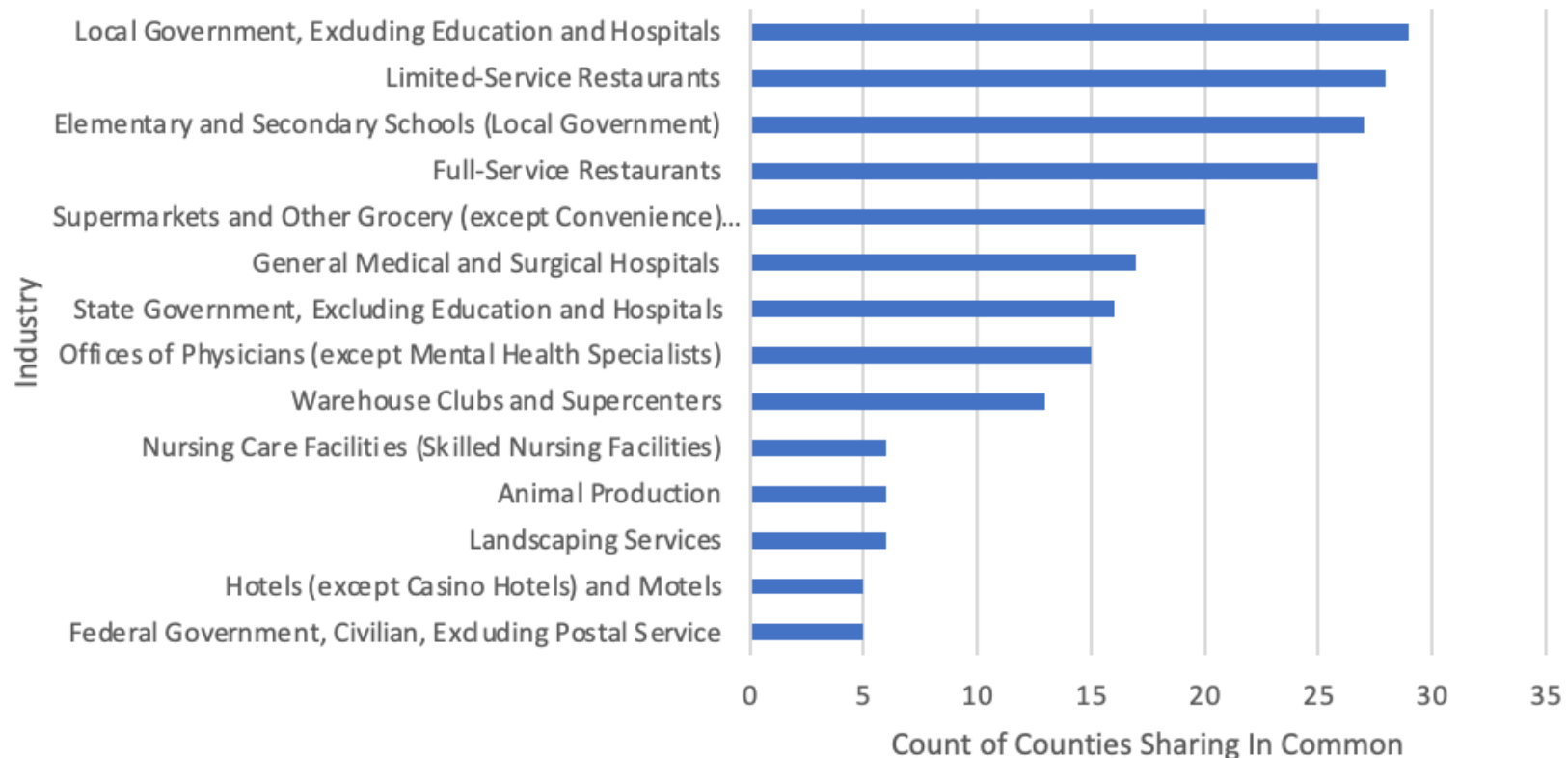
Cross Comparison of Top Occupations By County

	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		

80

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	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	

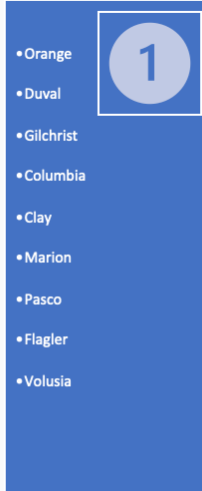


Kmodes Clustering

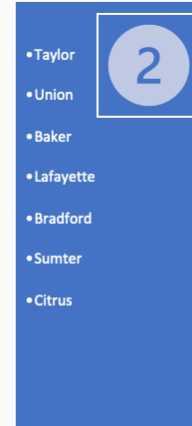
Kmode Clustering Results

- 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



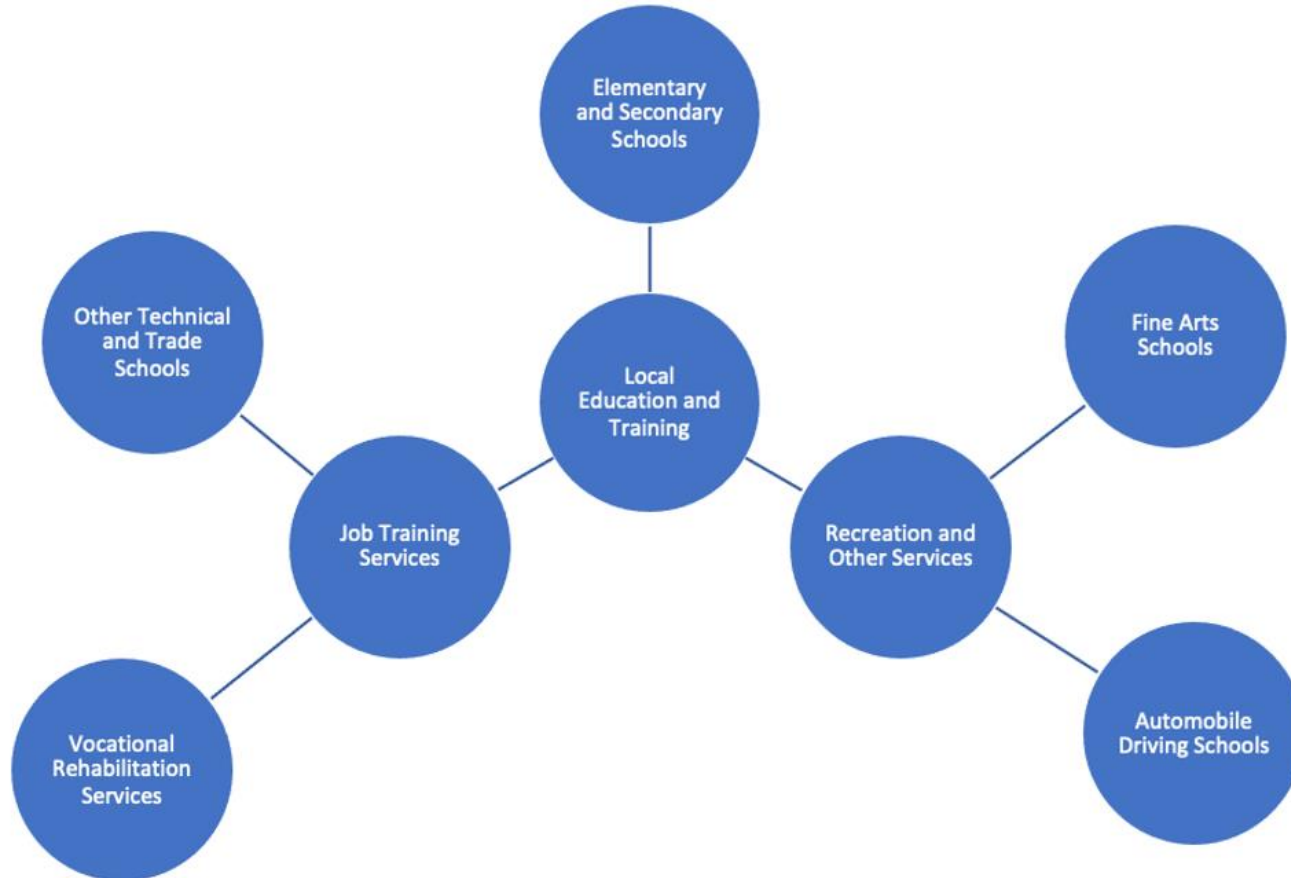
Cluster 3



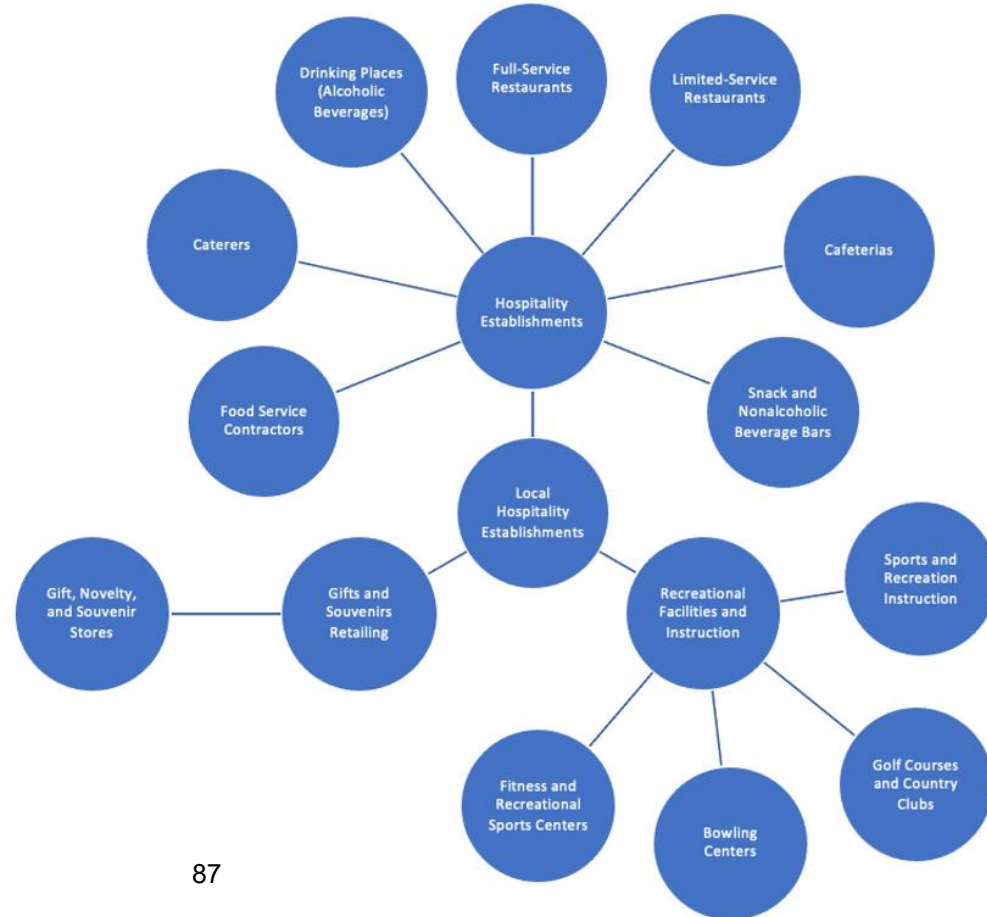
Industry Clusters and Subclusters

Related Industry Webs

Elementary and Secondary Schools



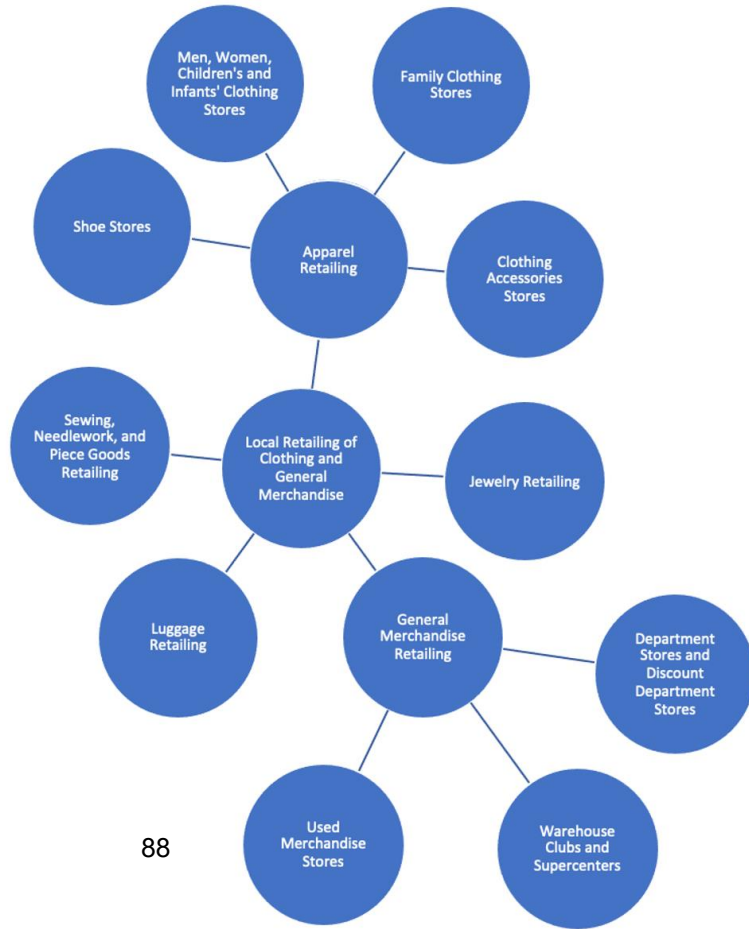
Full-Service Restaurants and Limited-Service Restaurants



Supermarkets and Other Grocery (except Convenience) Stores



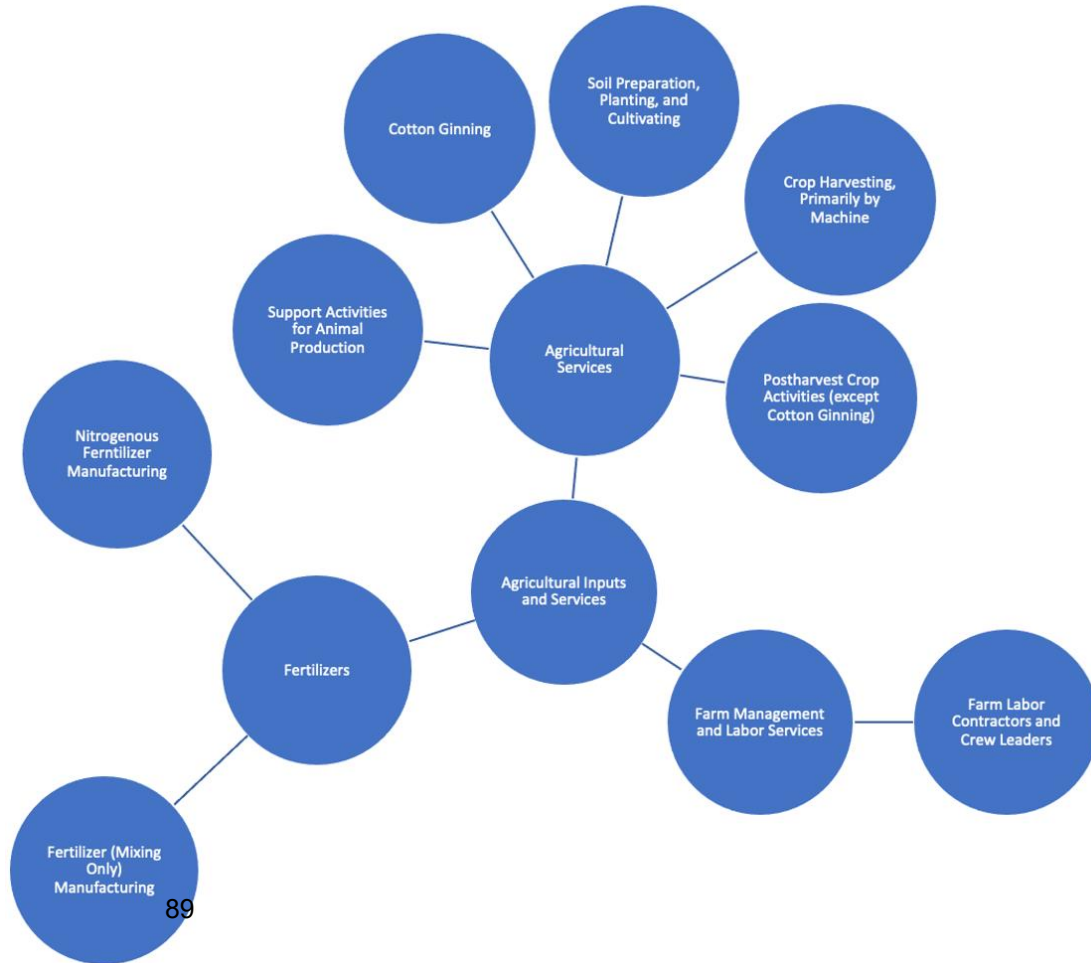
Warehouse Clubs and Supercenters



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



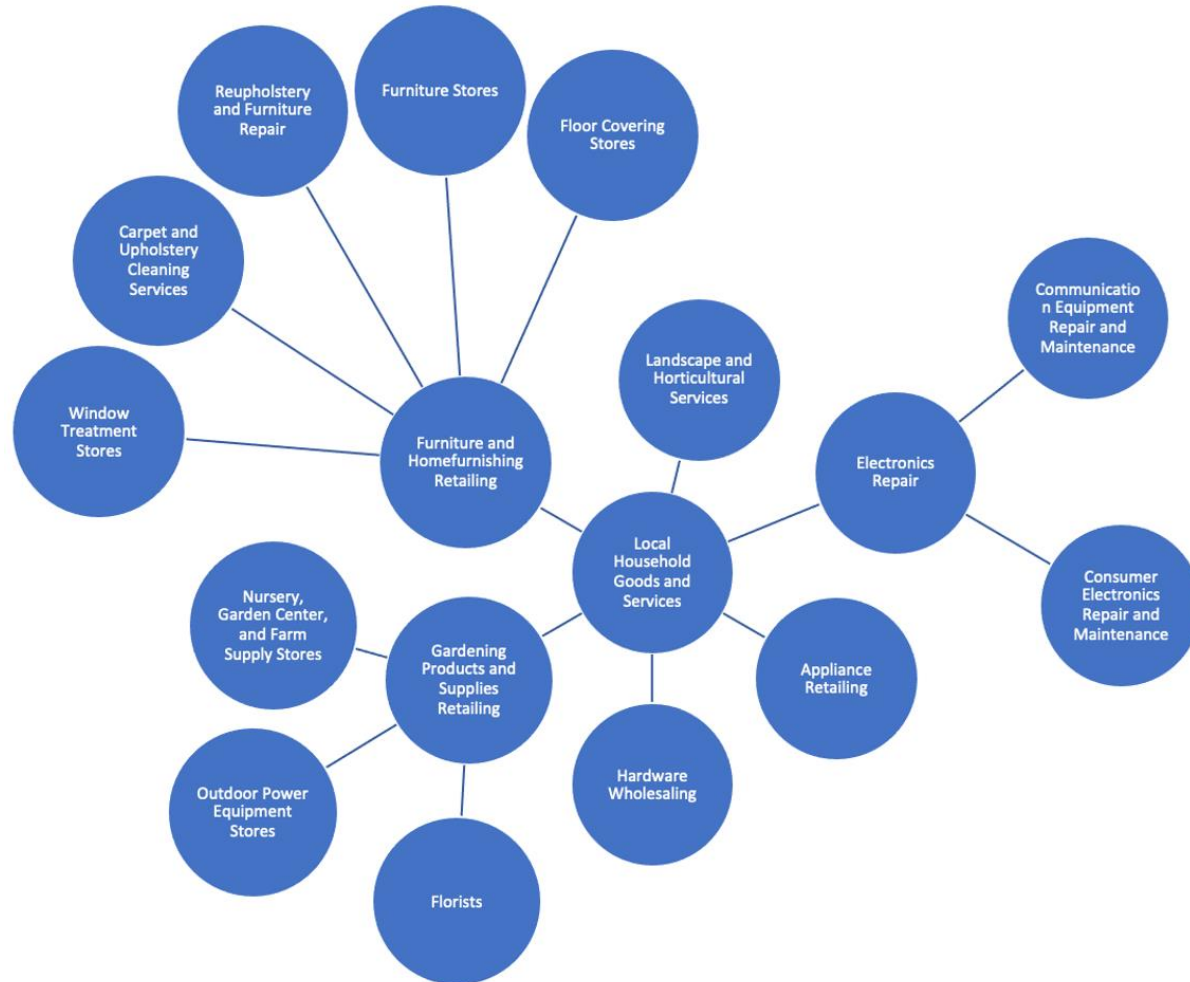
Support Activities for Animal Production



Hotels



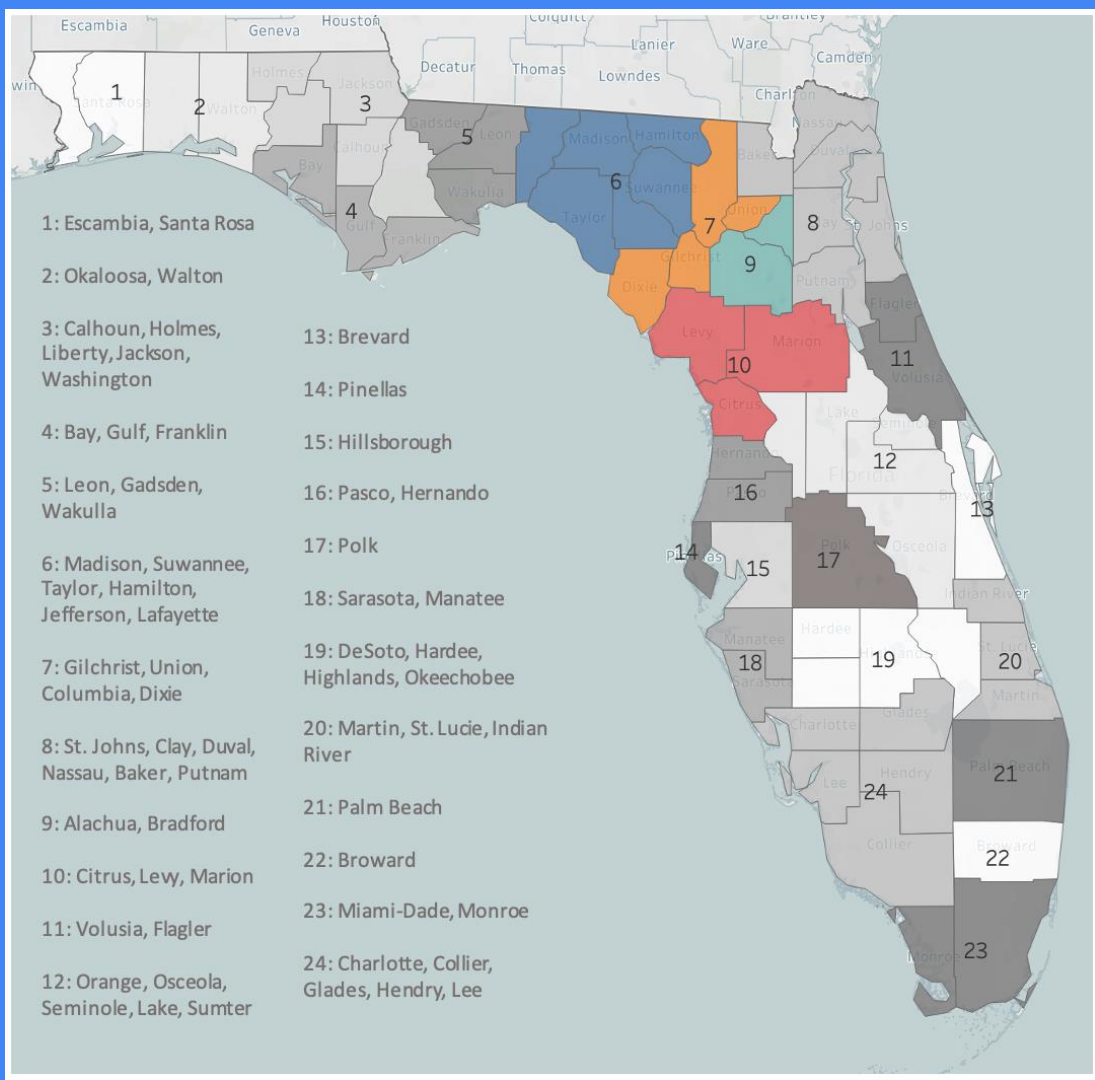
Landscaping Services



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 17 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)
- 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:



Table of Contents

Executive Summary.....	2
Key Findings:	2
Regions.....	3
Commuter Pattern and Occupational Overlap Analysis.....	5
Distance and Mode of Transit.....	6
Commute Method:	6
Commute Time:	7
Commuting Patterns and County Connections	8
Citrus	8
Levy	10
Marion.....	11
Occupations and Job Postings for Citrus, Levy, and Marion Counties	12
Citrus	12
Marion.....	17
Levy	22
Top Occupations Within a 60 Minute Drive Time	27
Citrus	28
Marion.....	29
Levy	30
Occupational Clusters and Commonalities For Related Counties of Interest	31
Occupations in Common.....	31
Kmode Analysis	36
Heatmaps	37
Industry Analysis and Industry Clusters.....	39
Regional Recommendations	48
Region 9: Alachua and Bradford Counties.....	48
Region 7: Gilchrist, Union, Columbia, and Dixie	48
Region 6: Madison, Suwannee, Taylor, Hamilton, and Lafayette	49
Appendix:	49

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

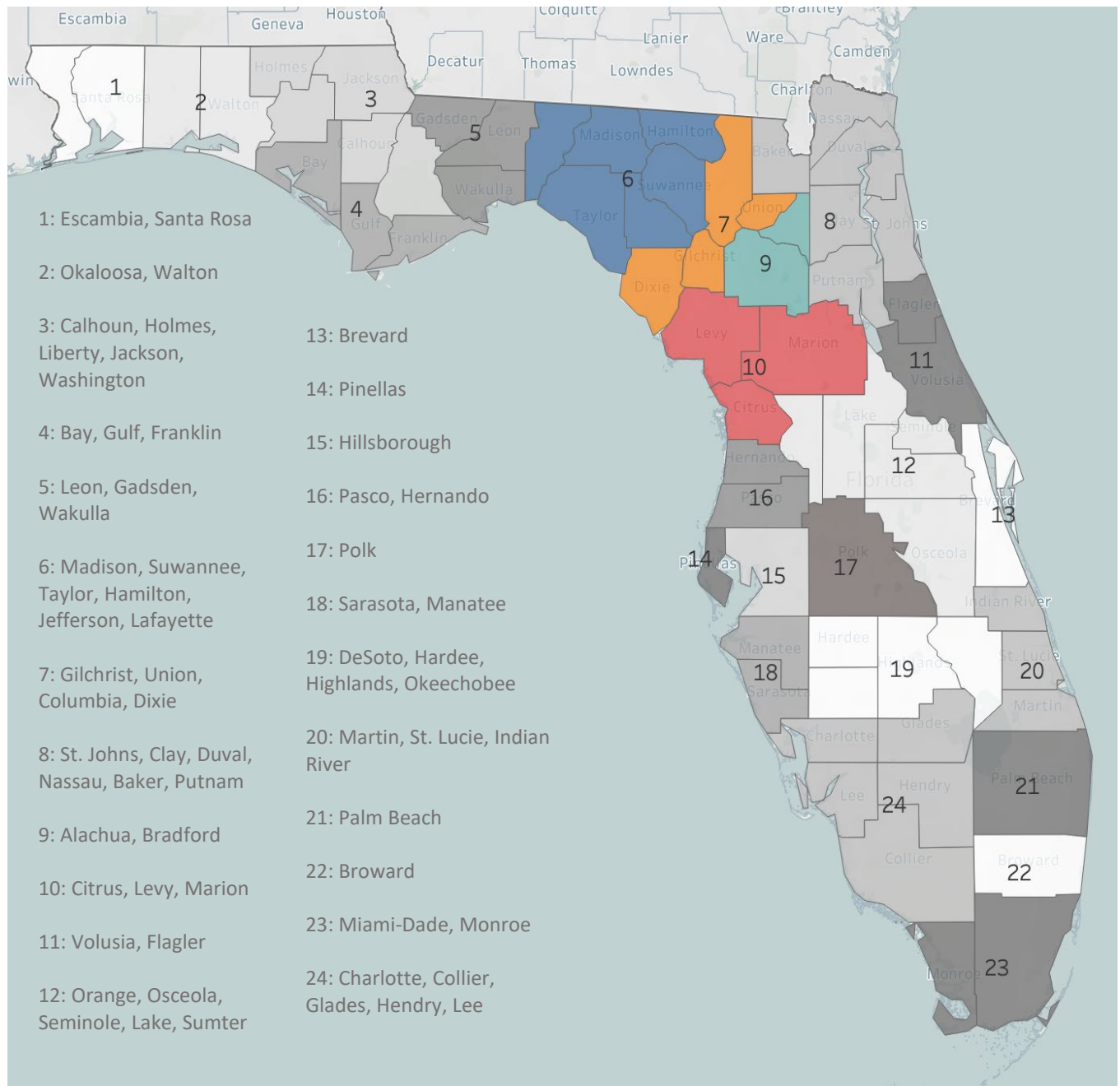
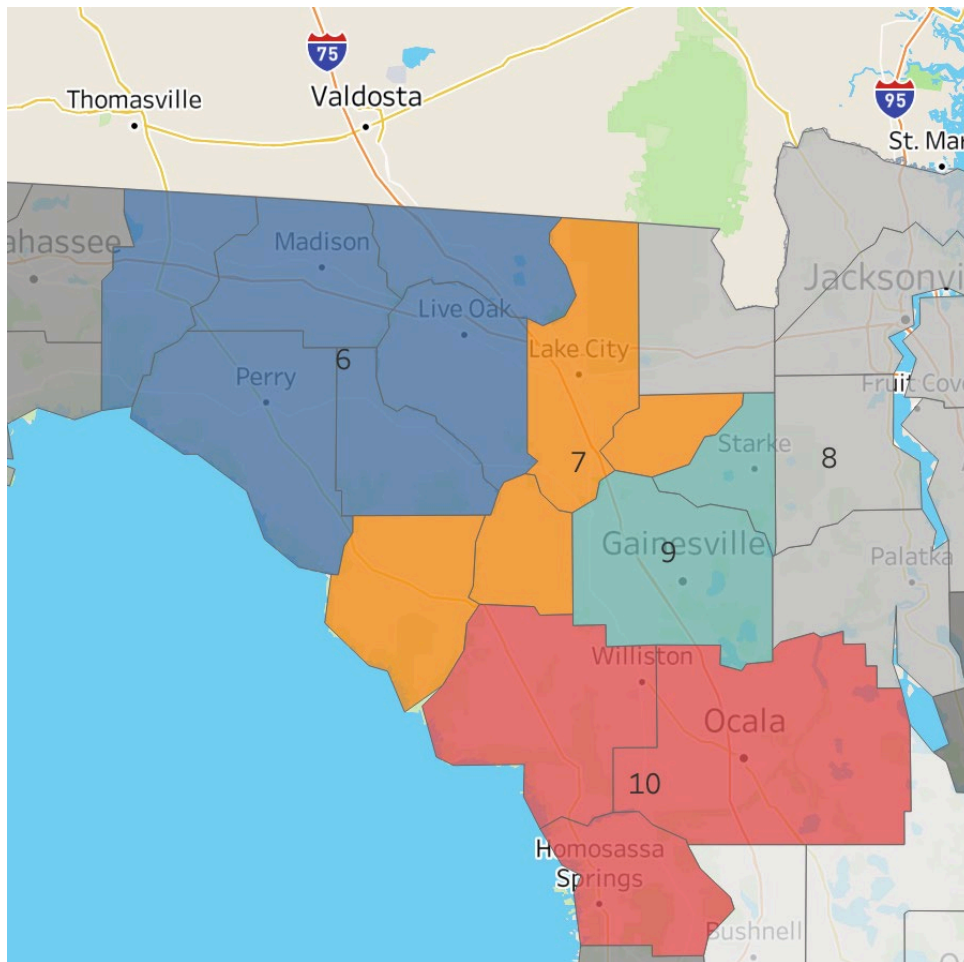


Figure 2. I-75 Route Through Regions 6, 7, 9, and 10



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

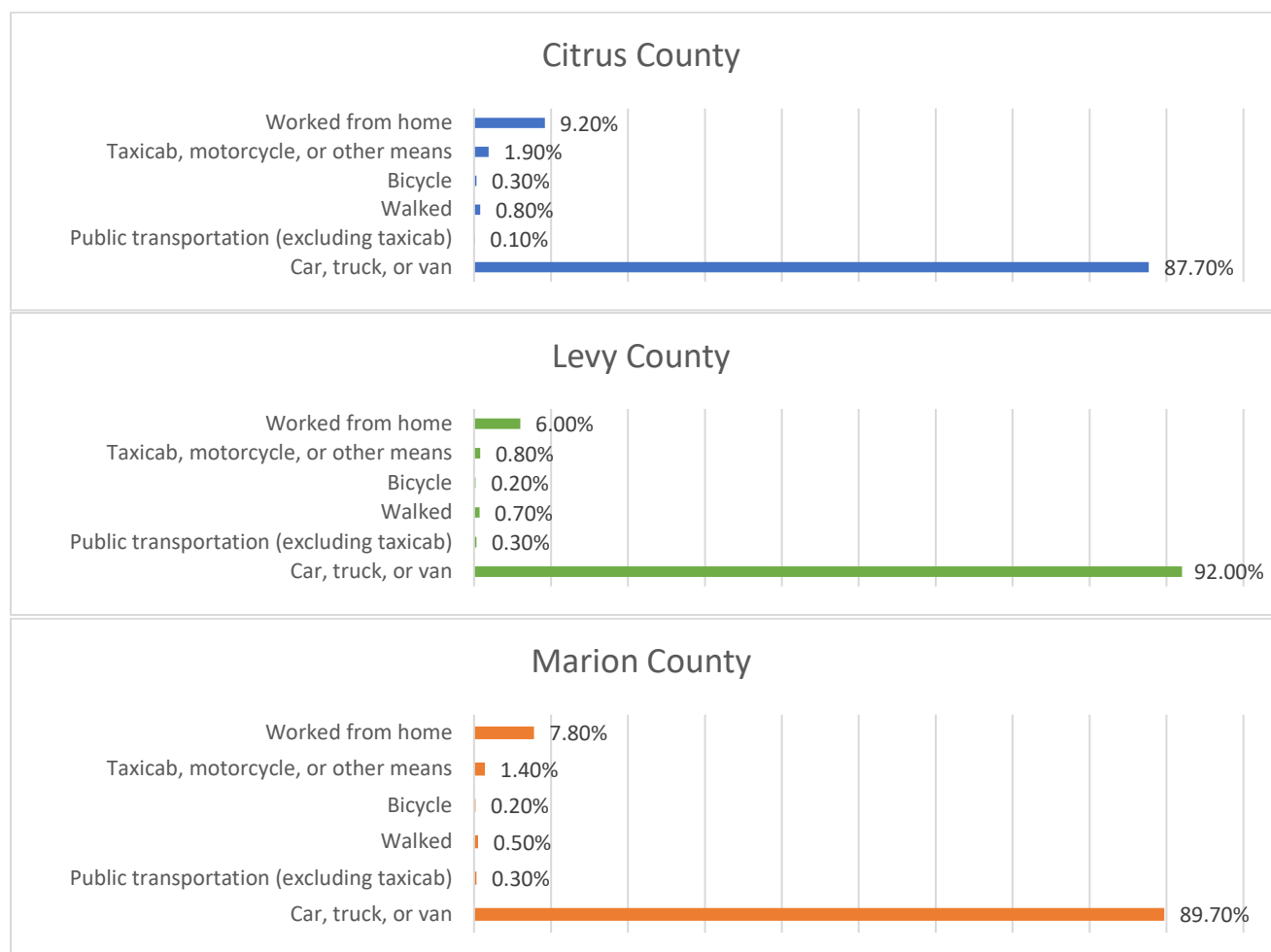
Marion and Citrus more than the two differ from one another, however amongst all considered counties there are many occupations and industries that overlap, and those skills and abilities can be applied in multiple similar industries.

Distance and Mode of Transit

Commute Method¹:

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



¹ US Census Bureau 5 Year Estimates: S0801

<https://data.census.gov/table?q=S0801:+COMMUTING+CHARACTERISTICS+BY+SEX&g=050XX00US12017,12075,12083&tid=AC SST5Y2021.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

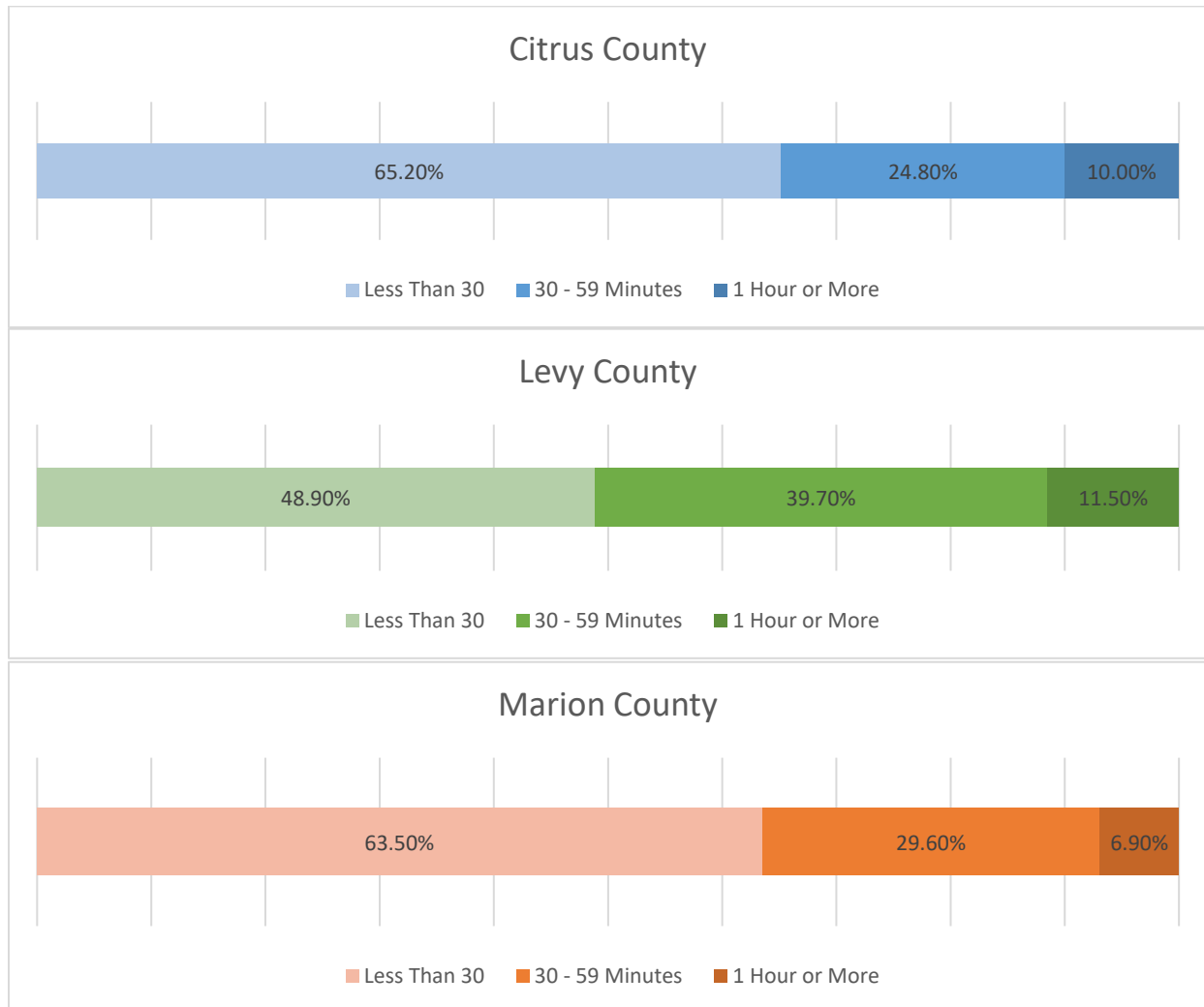


Table 1. Percent Working In County of Residence

	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 LODES², CareerSource Labor Shed data³, 2016-2020 5-Year ACS Commuting Flows⁴, FloridaCommerce County-to-County Worker Flow⁵, and Census Transportation Planning Product data (CTPP)⁶. 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.

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

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

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

⁵ 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>

⁶ 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

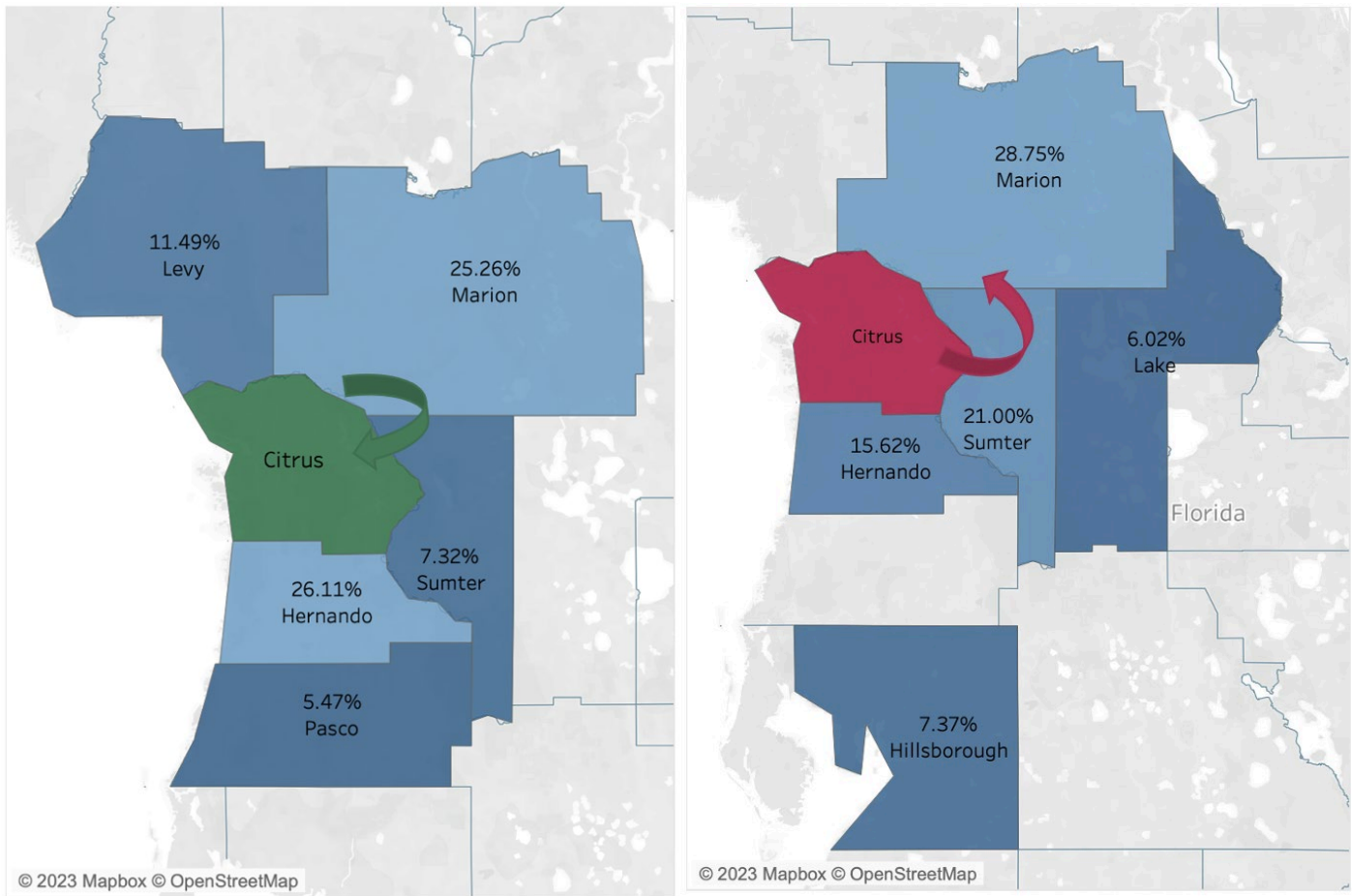
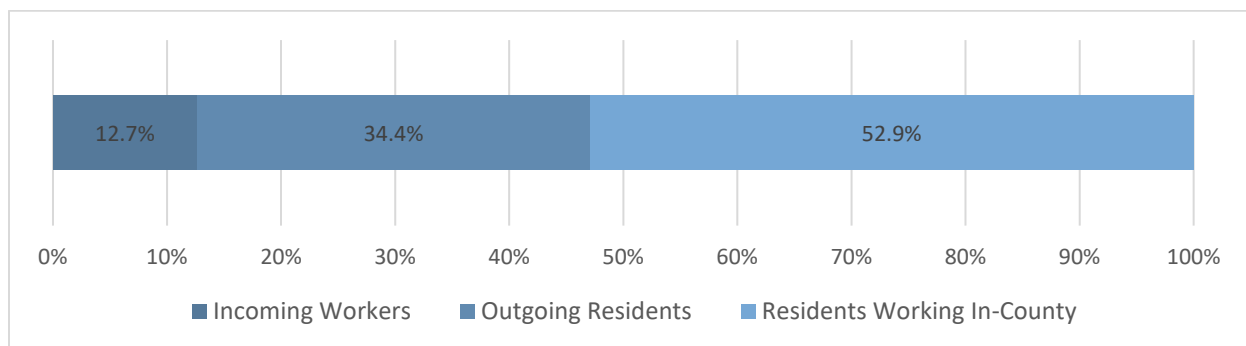


Figure 6. Proportion of Incoming, Outgoing, and In-County Workers



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

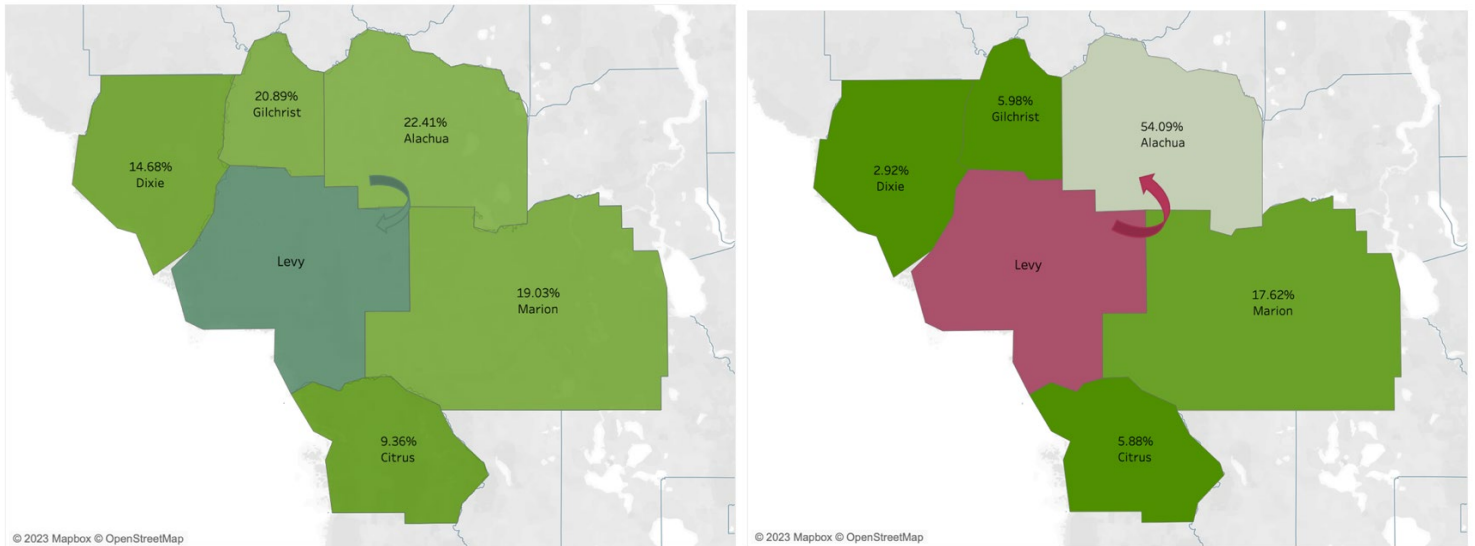
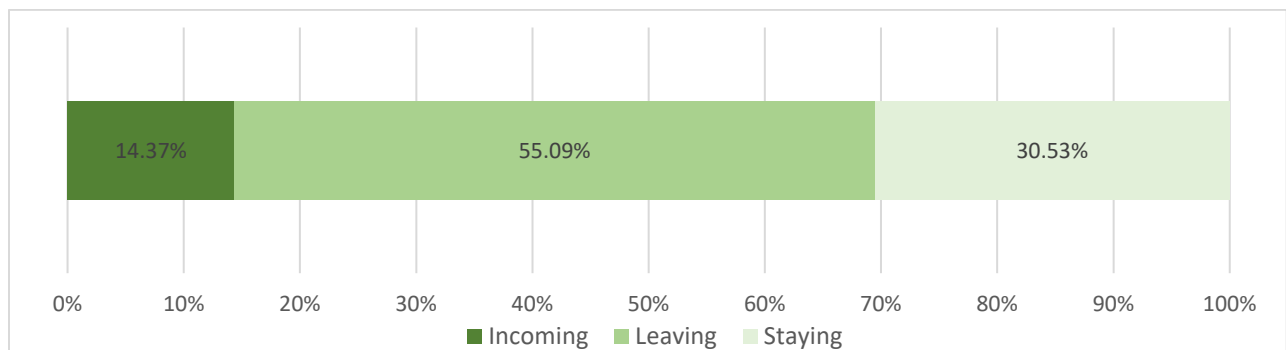


Figure 8. Proportion of Incoming, Outgoing, and In-County Workers



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

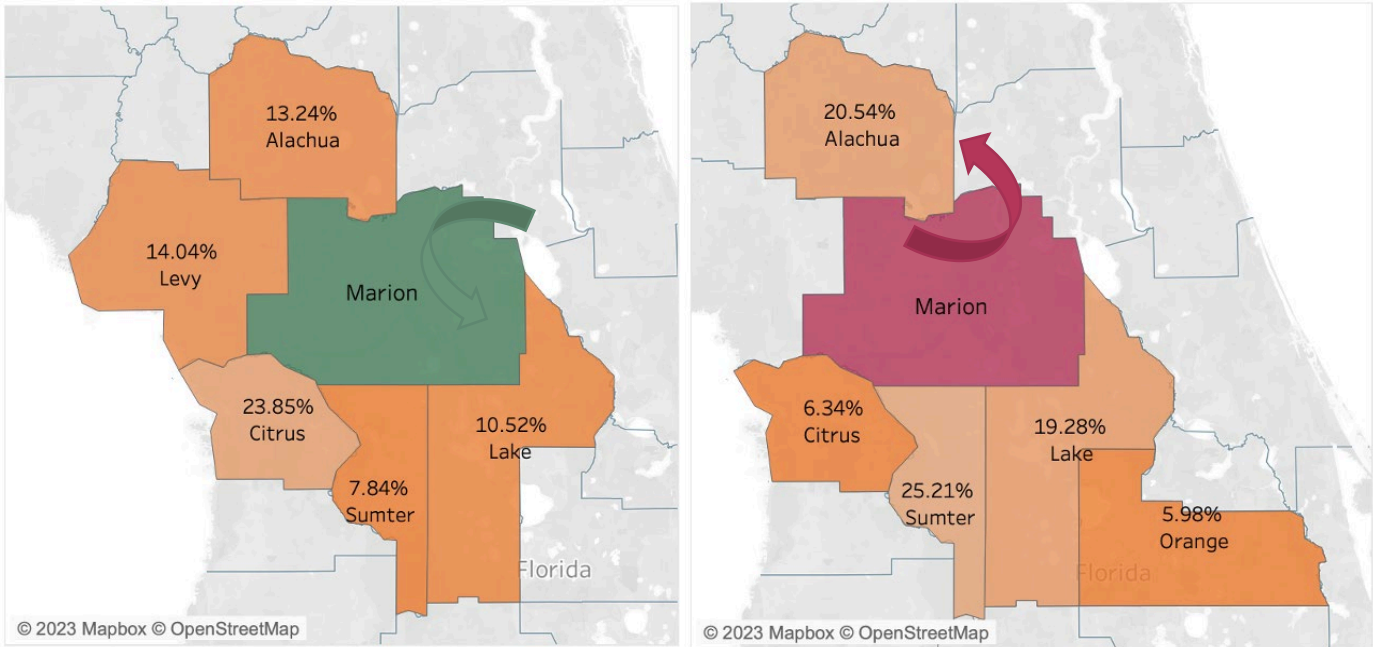
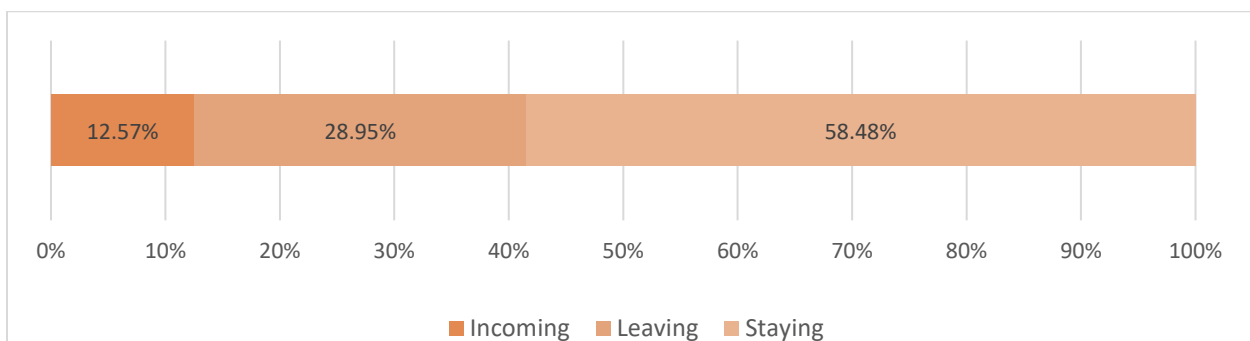


Figure 10. Proportion of Incoming, Outgoing, and In-County Workers



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

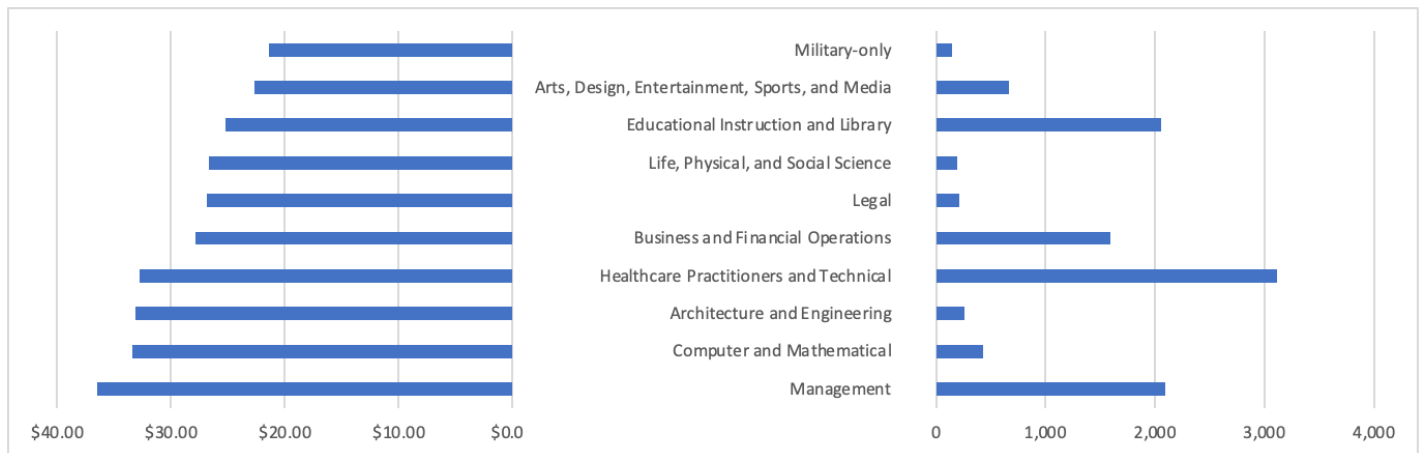


Figure 13. Fastest Growing Occupations (2018-2023) In Citrus

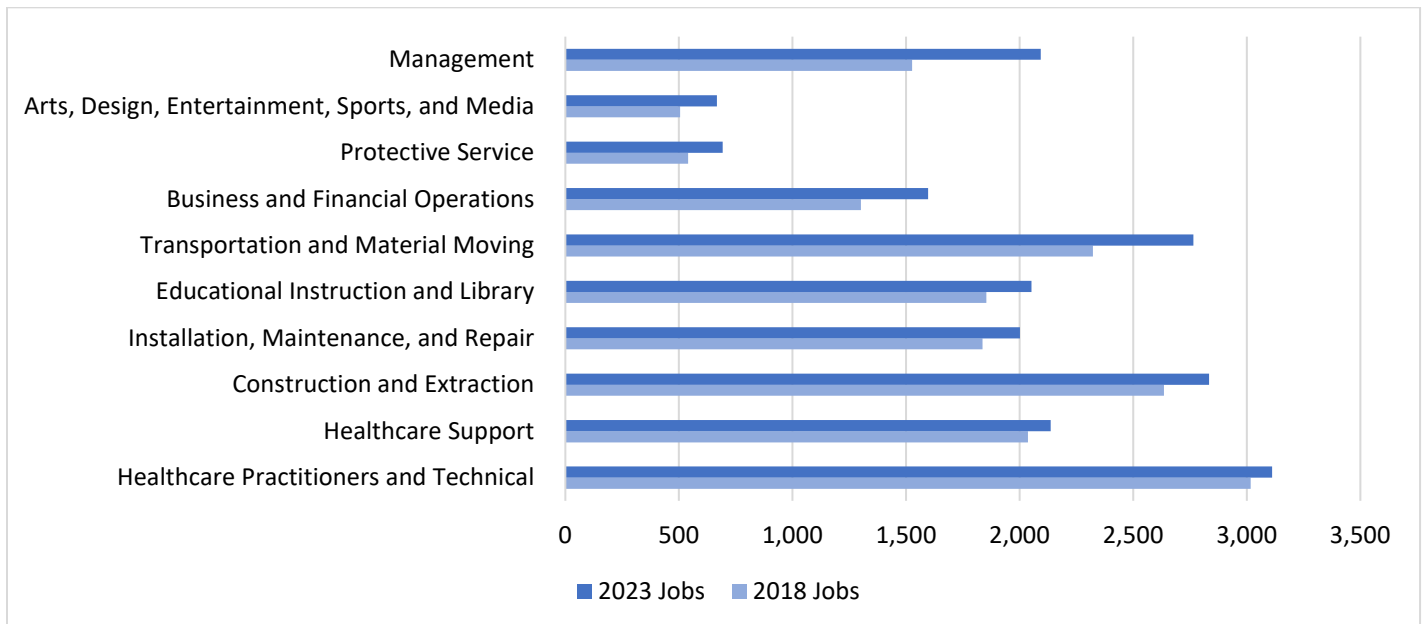
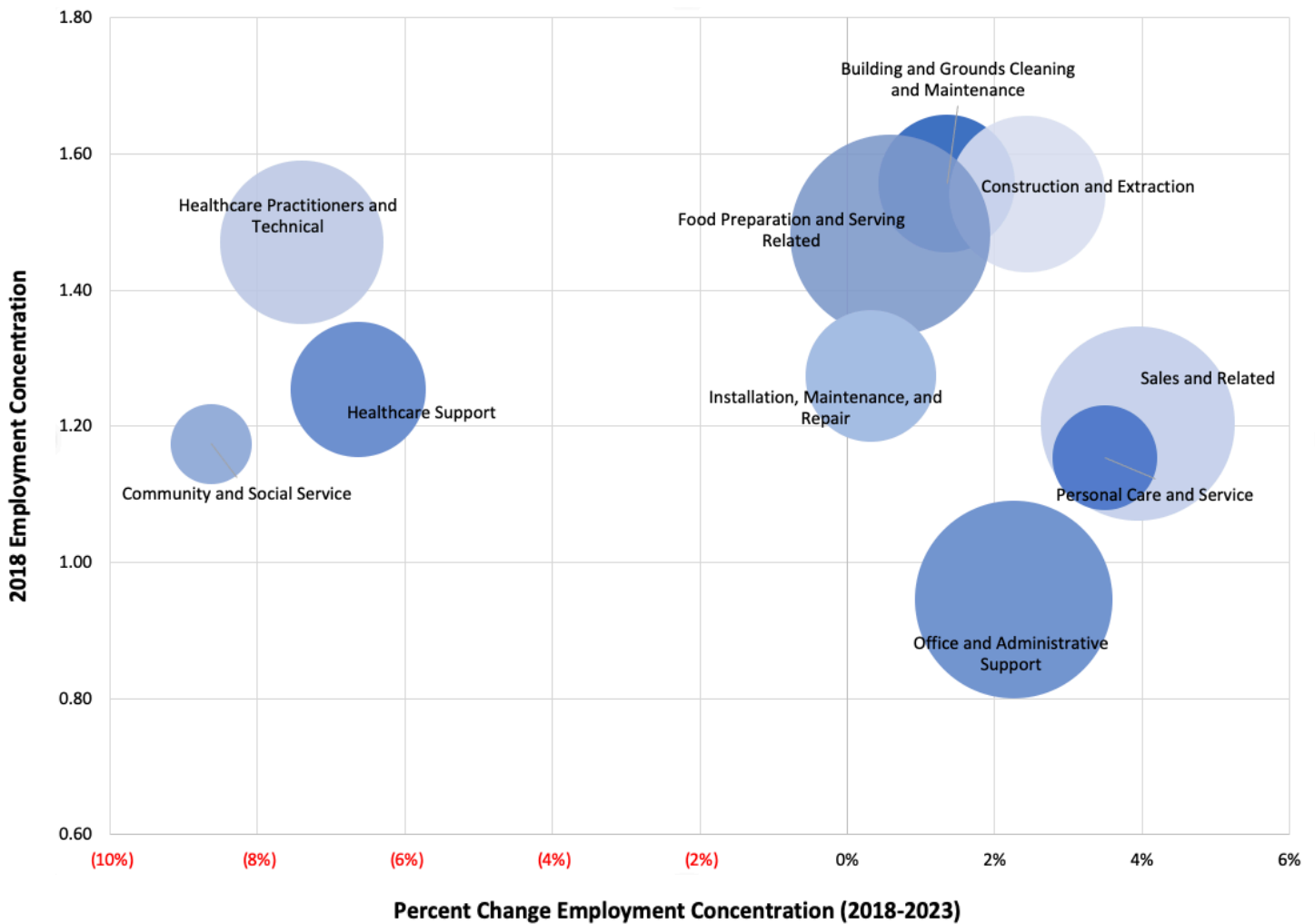


Figure 14. Highest Occupation Employment Concentration In Citrus



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

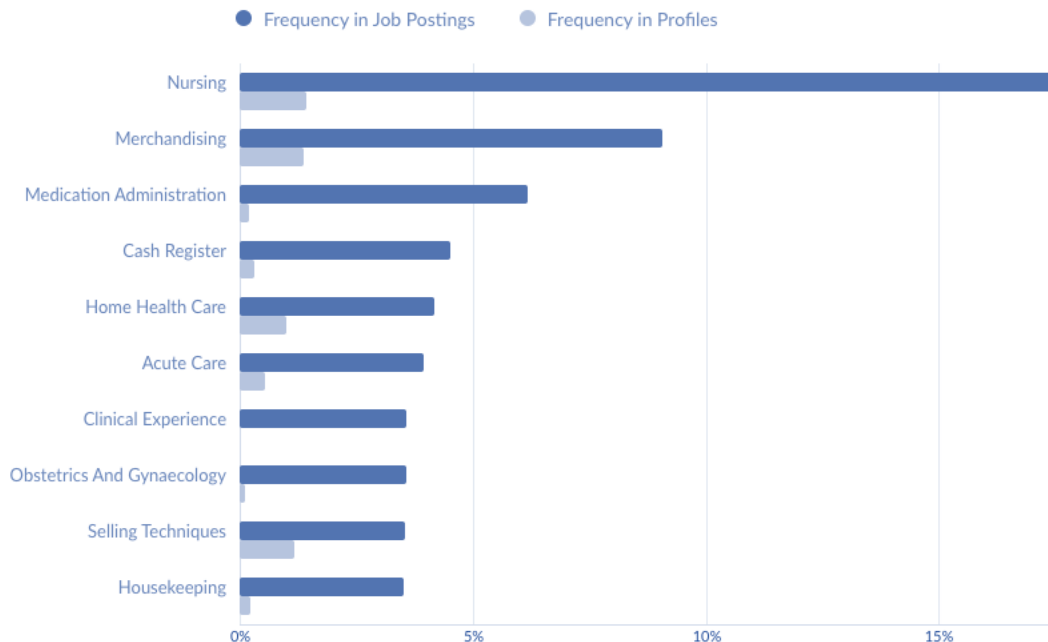


Figure 16. Common Skills In Citrus Job Postings

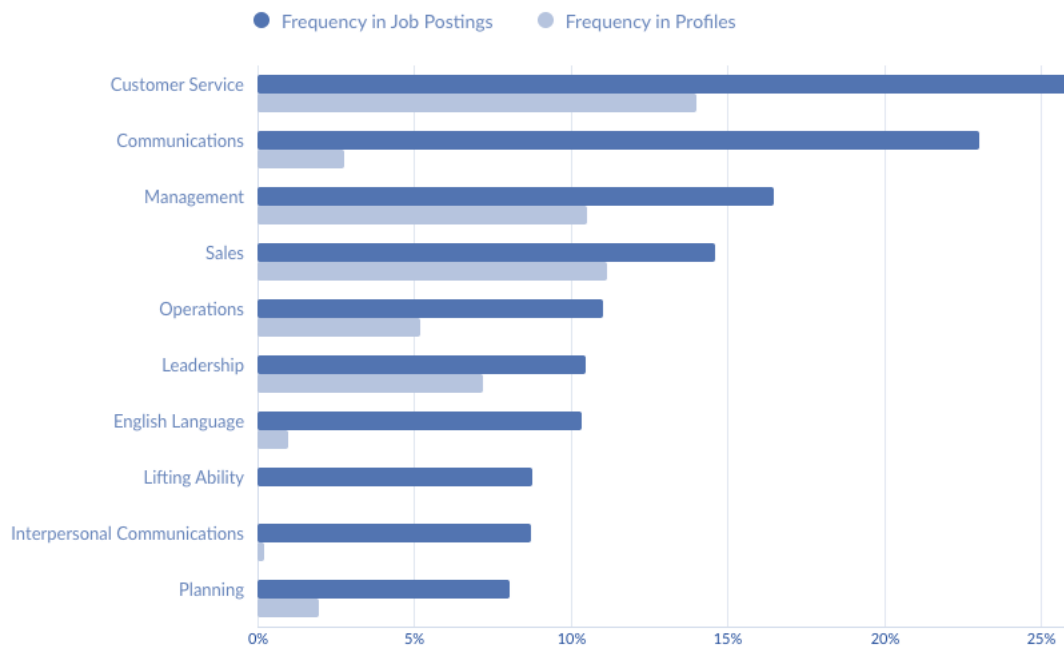


Table 2. Top Posted Occupations and Industries in Citrus

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

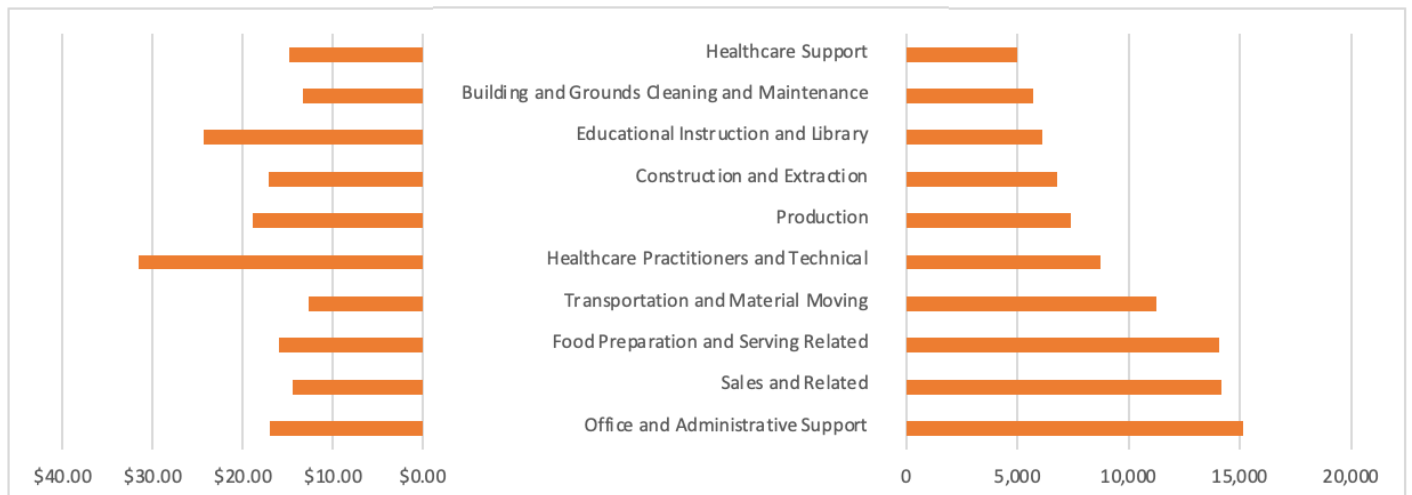


Figure 18. Highest Paying Occupations (2018-2023) In Marion: 2022 Median Hourly Earnings | 2023 Jobs

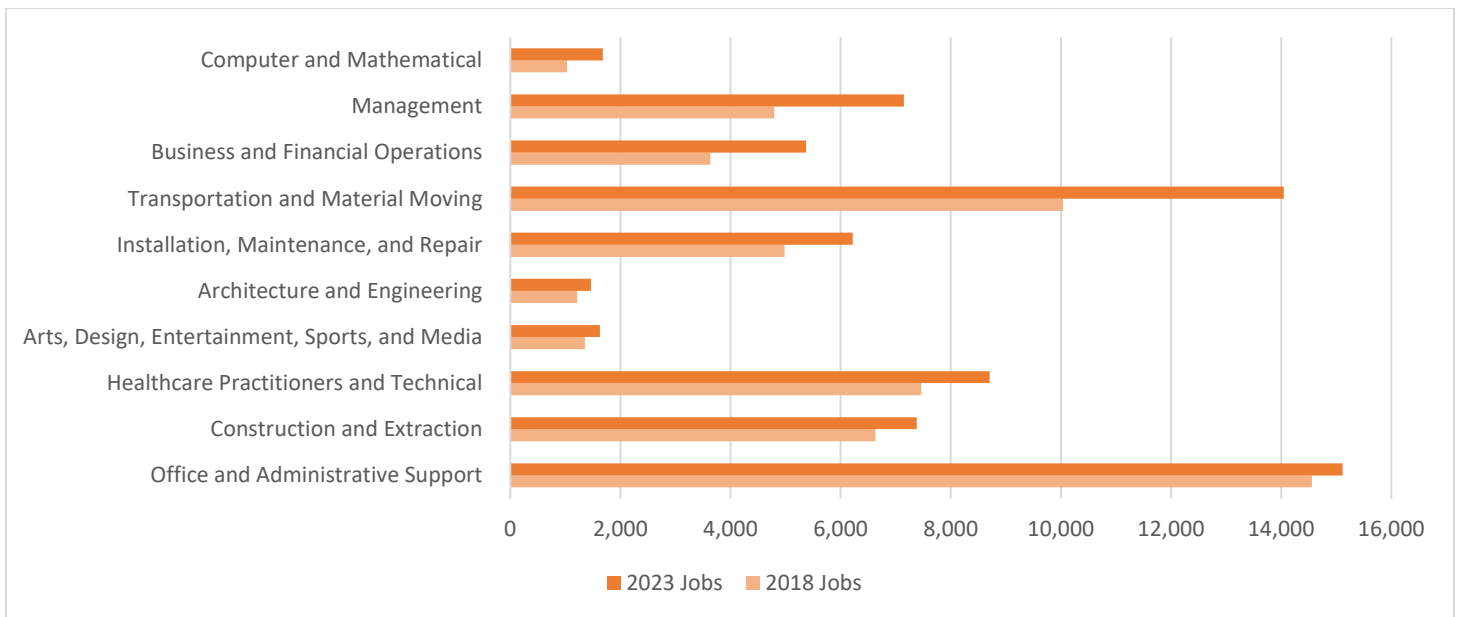


Figure 19. Fastest Growing Occupations (2018-2023) In Marion

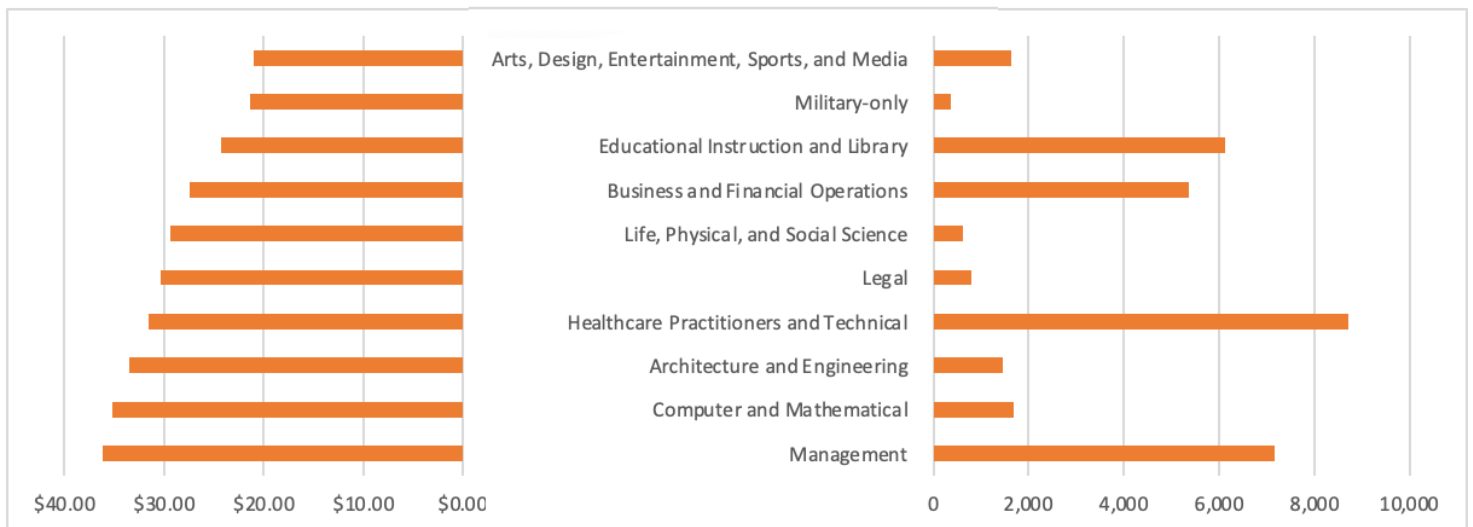
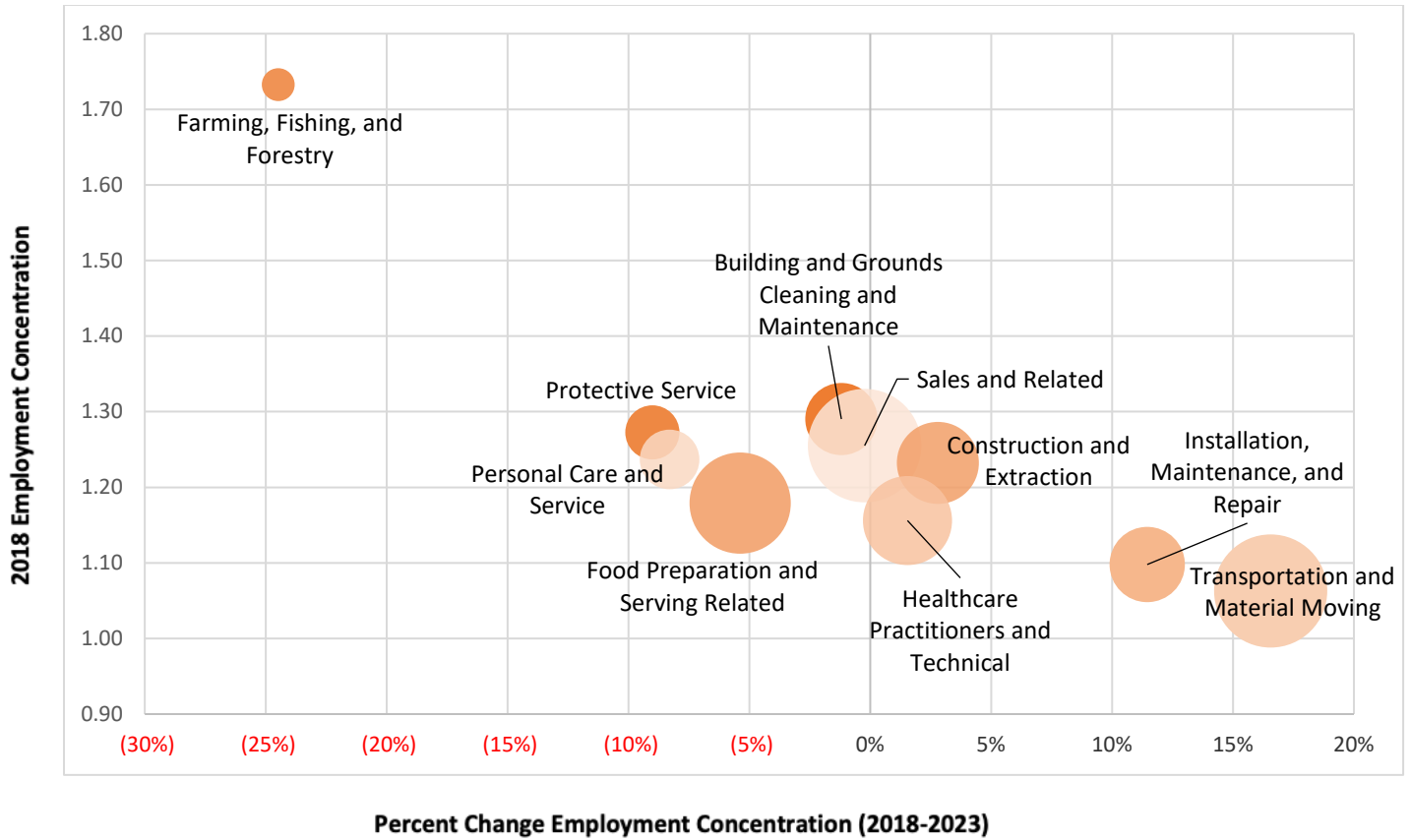


Figure 20. Highest Occupation Employment Concentration In Marion



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

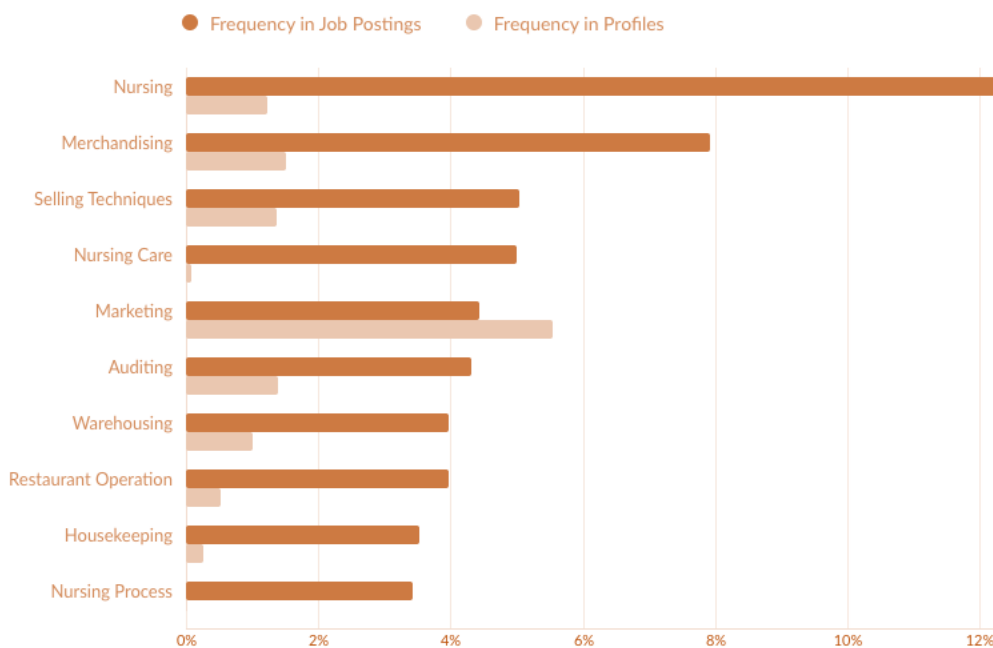


Figure 22. Common Skills In Marion Job Postings

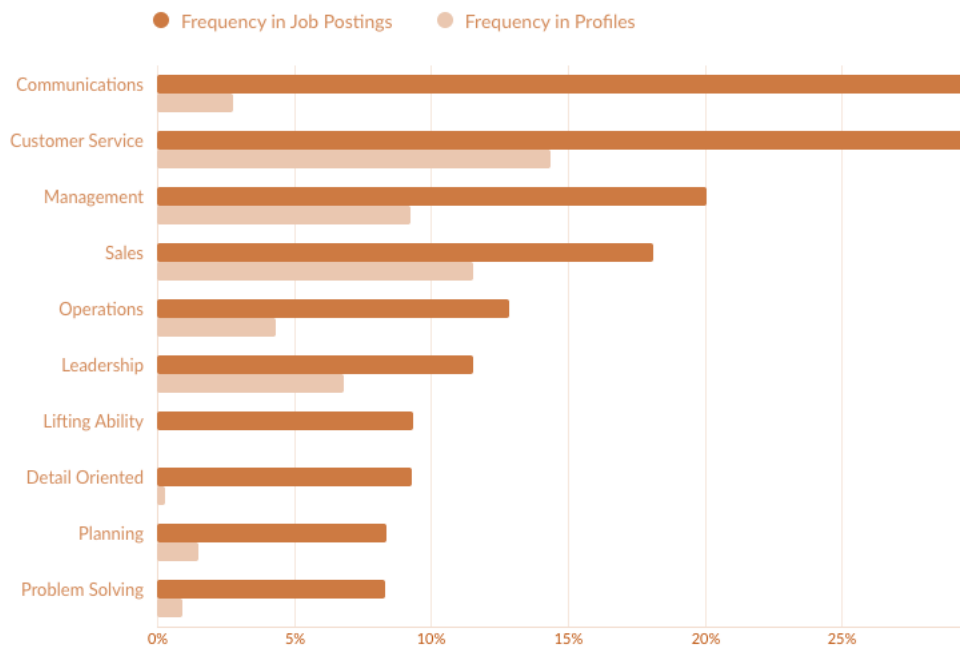


Table 3. Top Posted Occupations and Industries in Marion

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

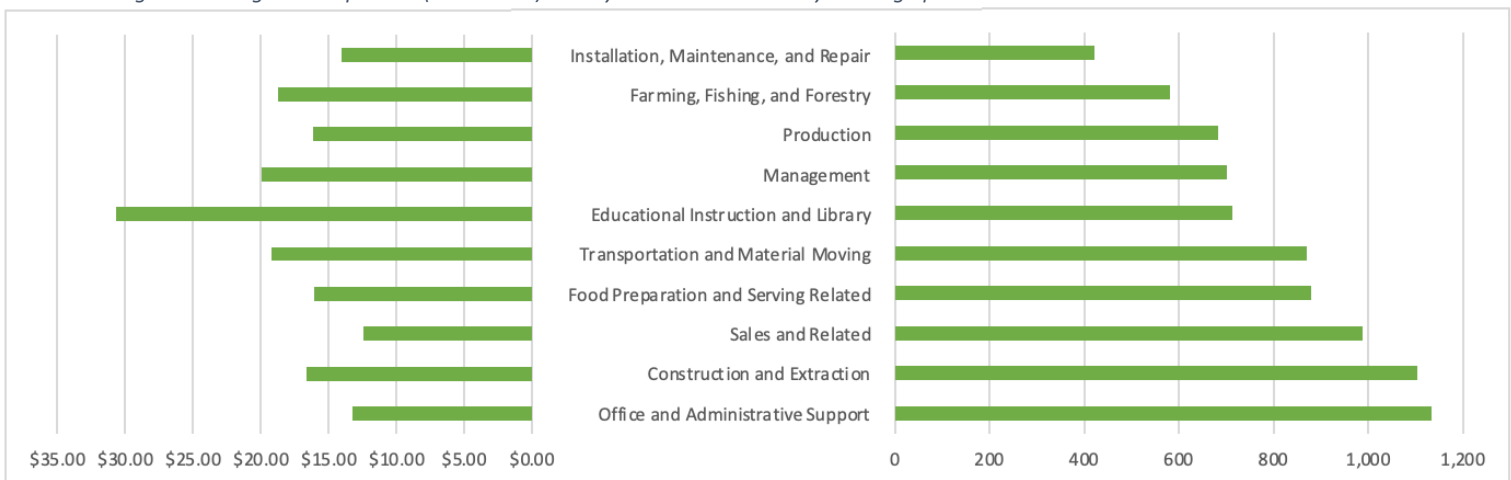


Figure 24. Highest Paying Occupations (2018-2023) In Levy: 2022 Median Hourly Earnings | 2023 Jobs

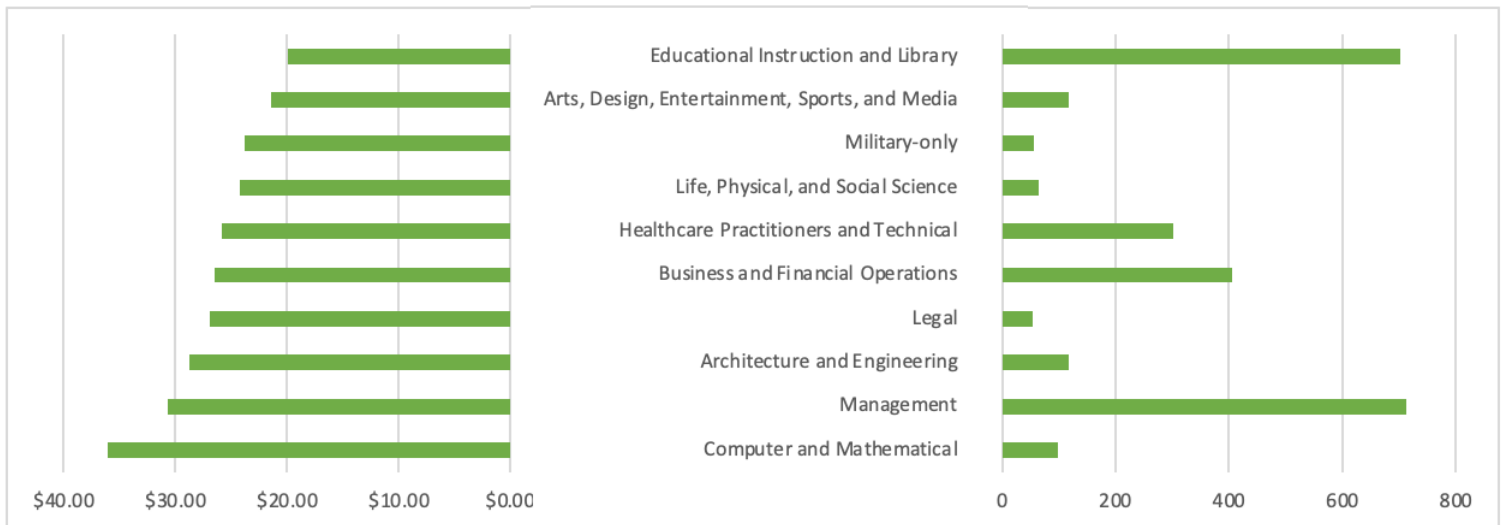


Figure 25. Fastest Growing Occupations (2018-2023) In Levy

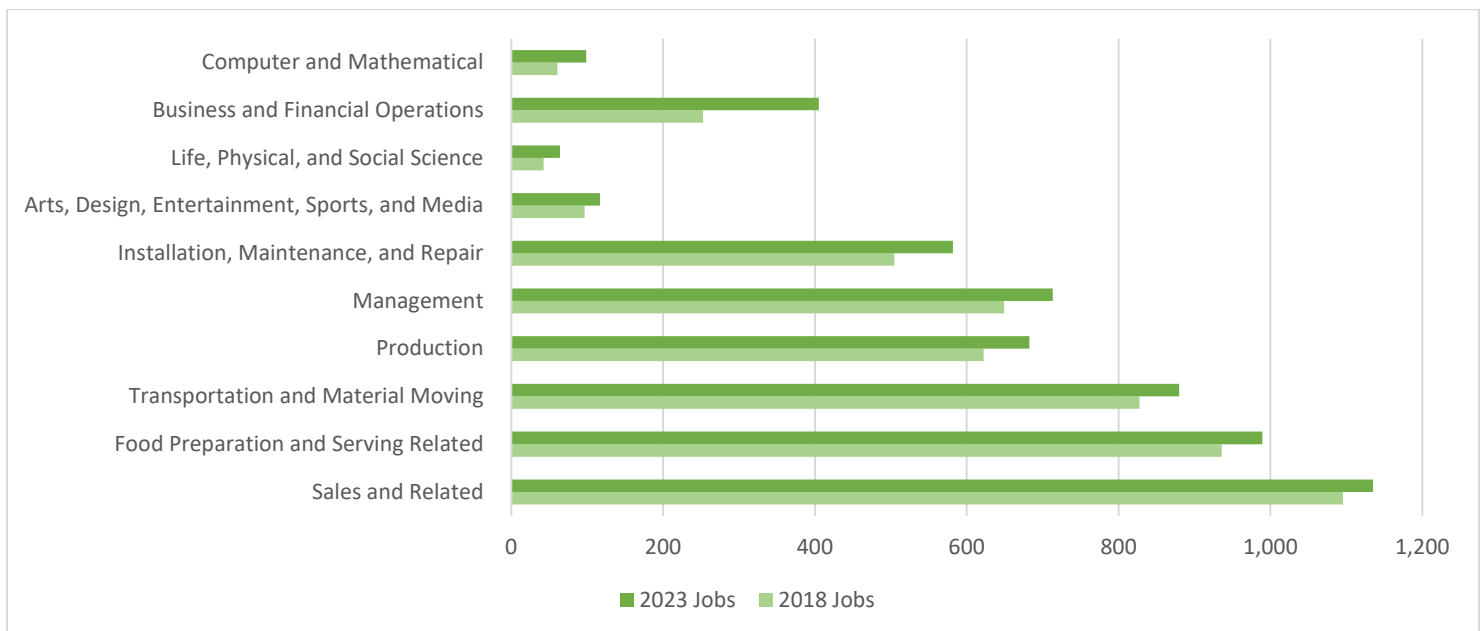
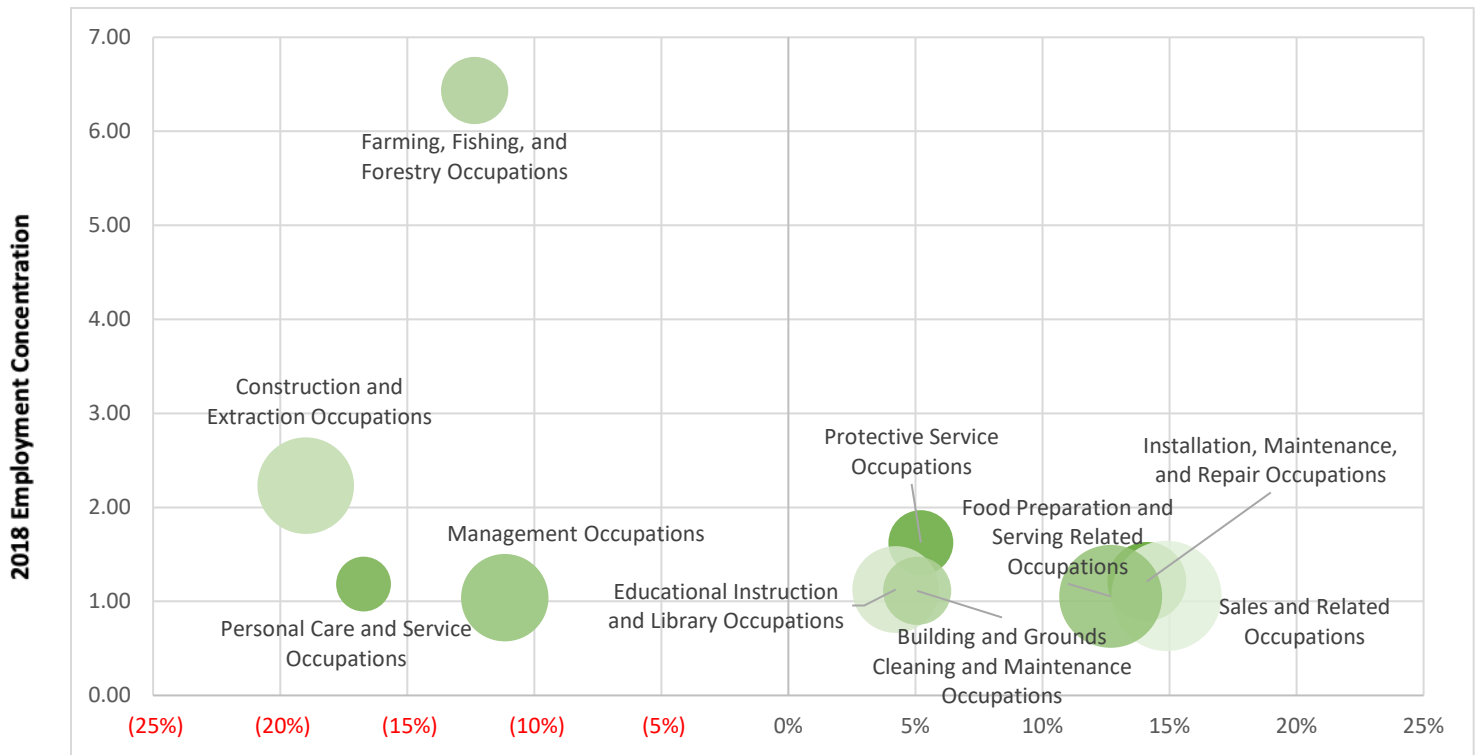


Figure 26. Highest Occupation Employment Concentration In Levy



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

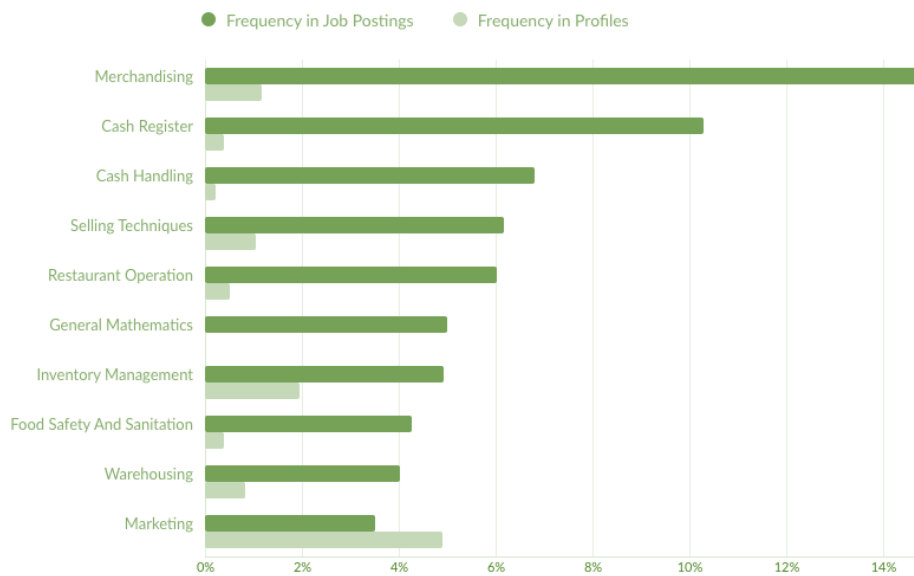


Figure 28. Common Skills In Levy Job Postings

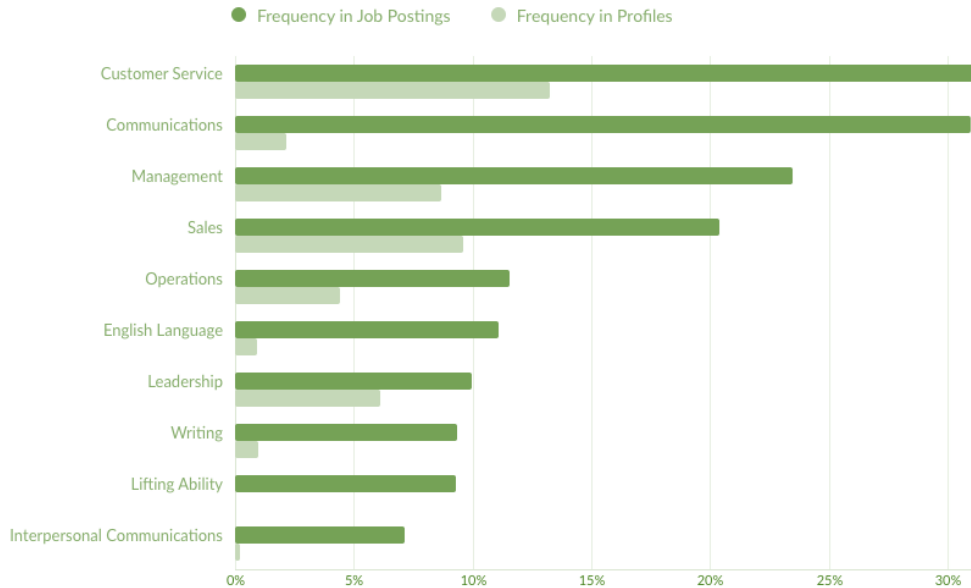


Table 4. Top Posted Occupations and Industries in Levy

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

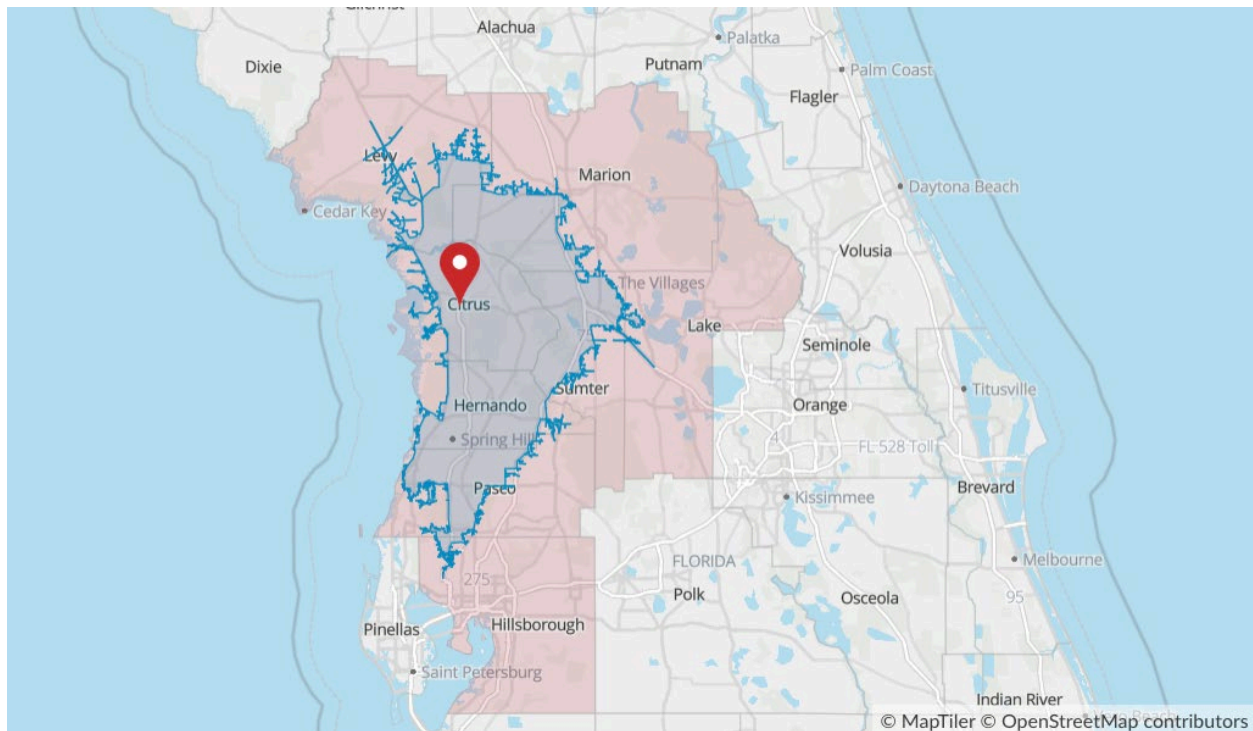


Table 5. Top 5-Digit Occupations Within 60 Minute Drive of Citrus County By Number of Jobs

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

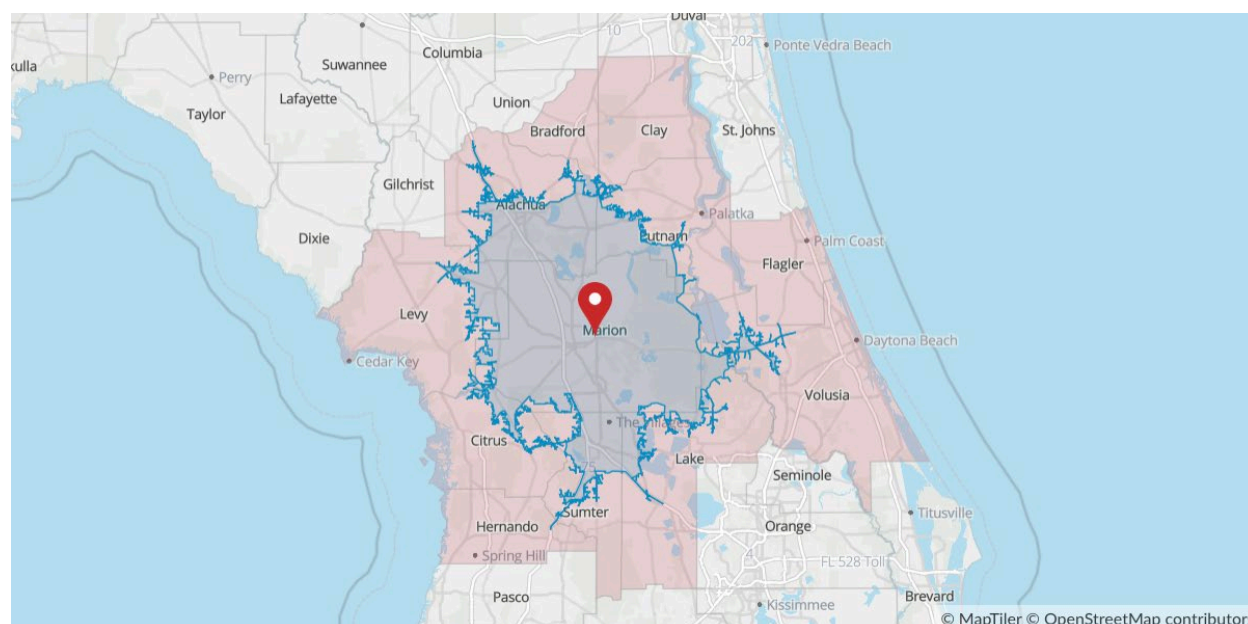


Table 7. Top 5-Digit Occupations Within 60 Minute Drive of Marion County By Number of Jobs

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

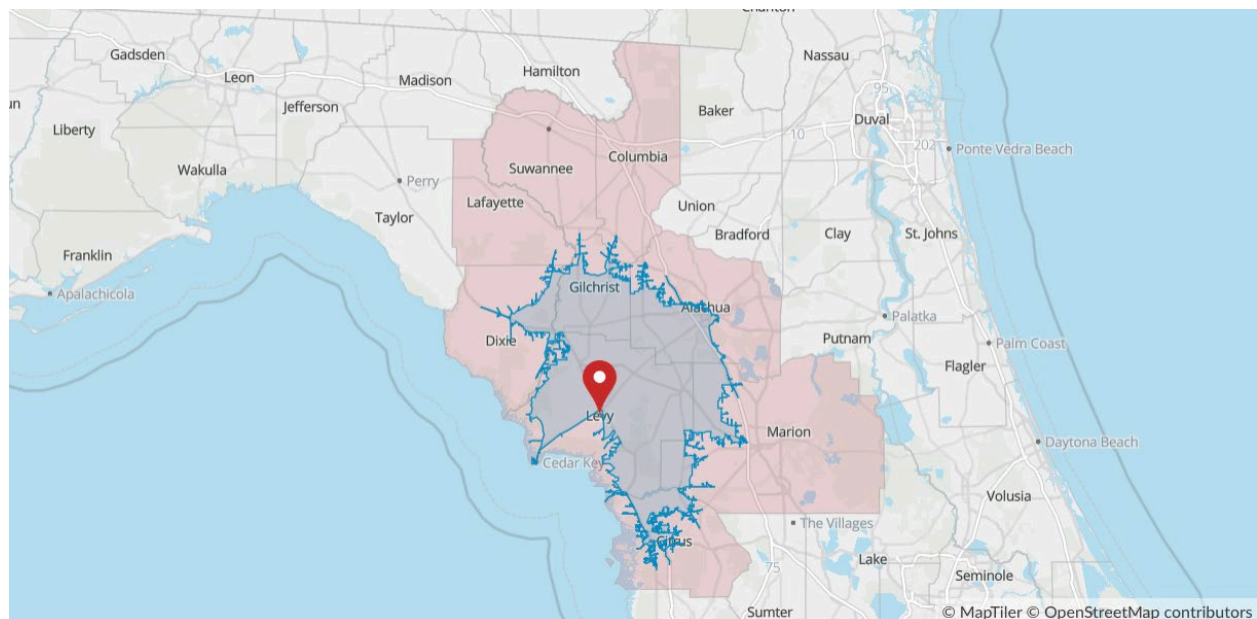


Table 9. Top 5-Digit Occupations Within 60 Minute Drive of Levy County By Number of Jobs

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 occupations⁷ 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).

⁷ 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

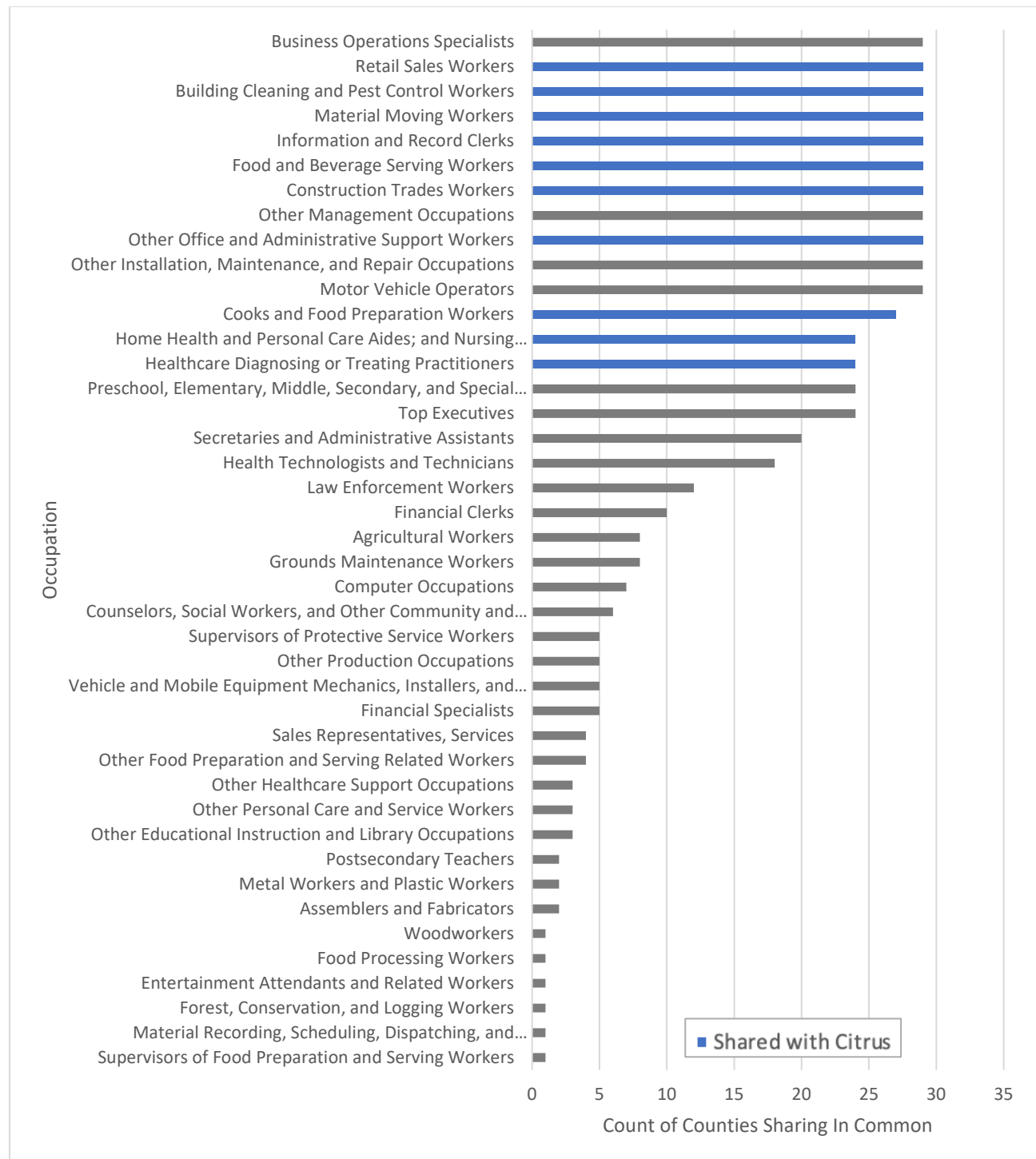


Figure 33. Overlapping Top Occupations In Counties of Interest With Marion Top Occupations

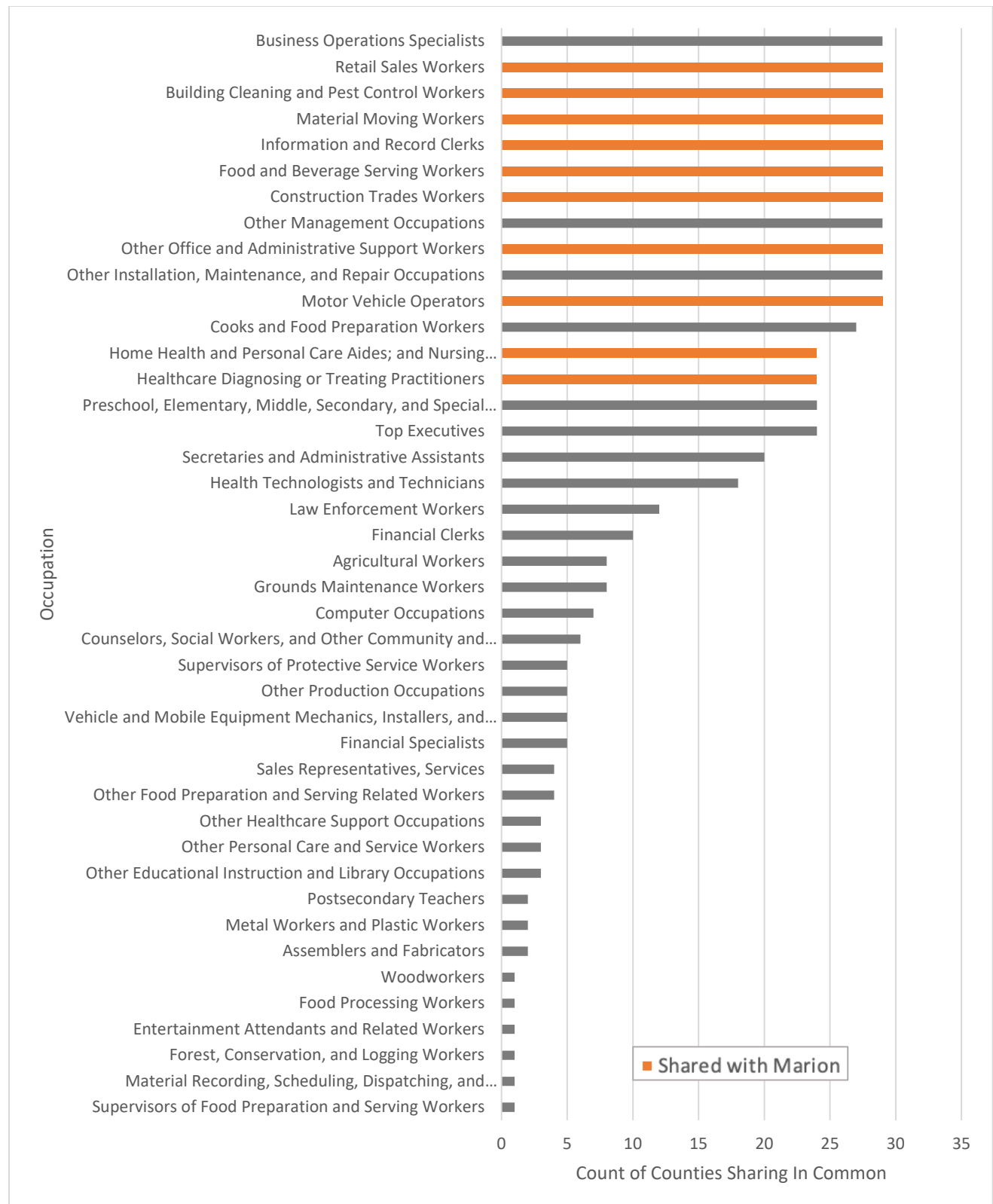
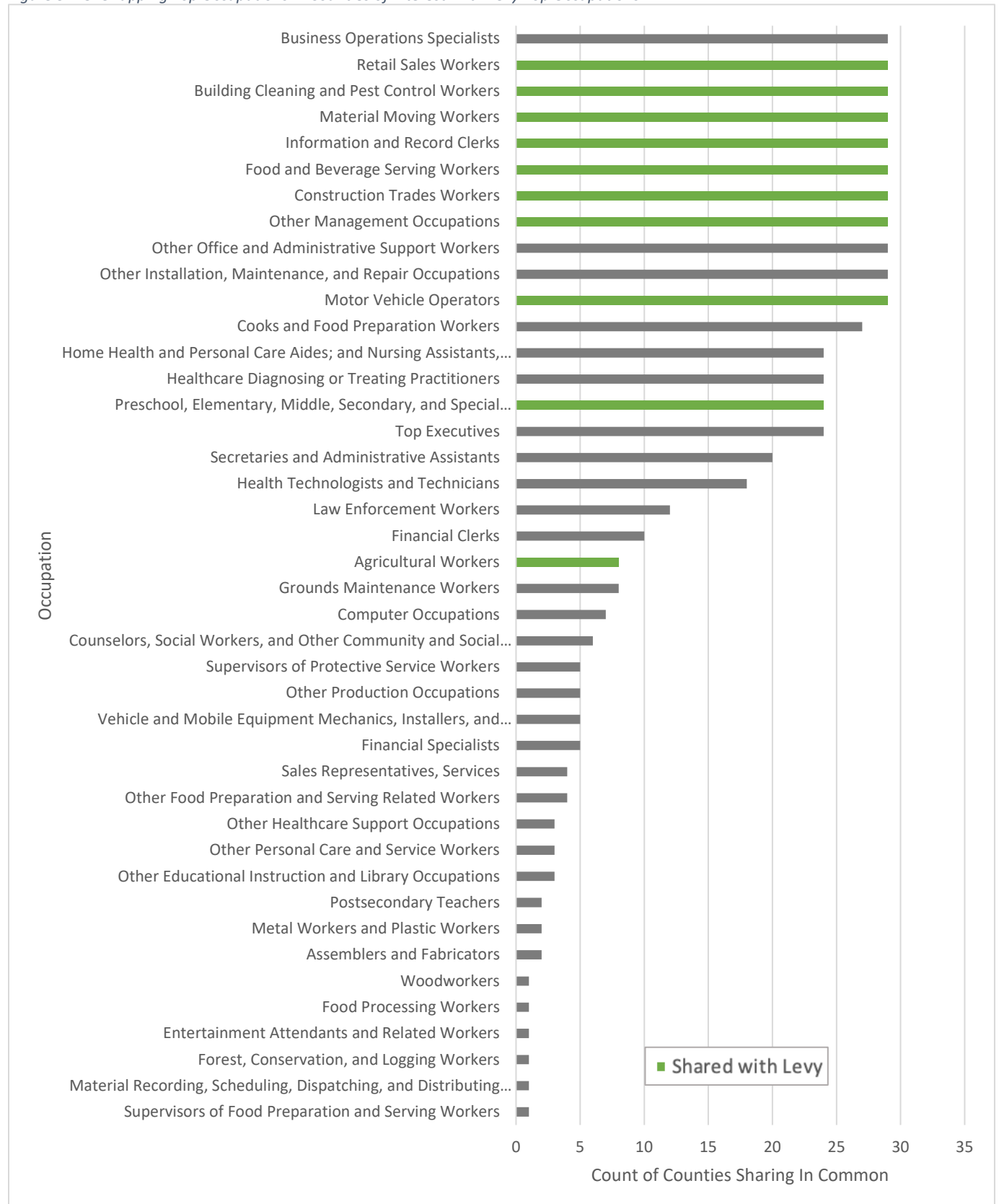


Figure 34. Overlapping Top Occupations In Counties of Interest With Levy Top Occupations

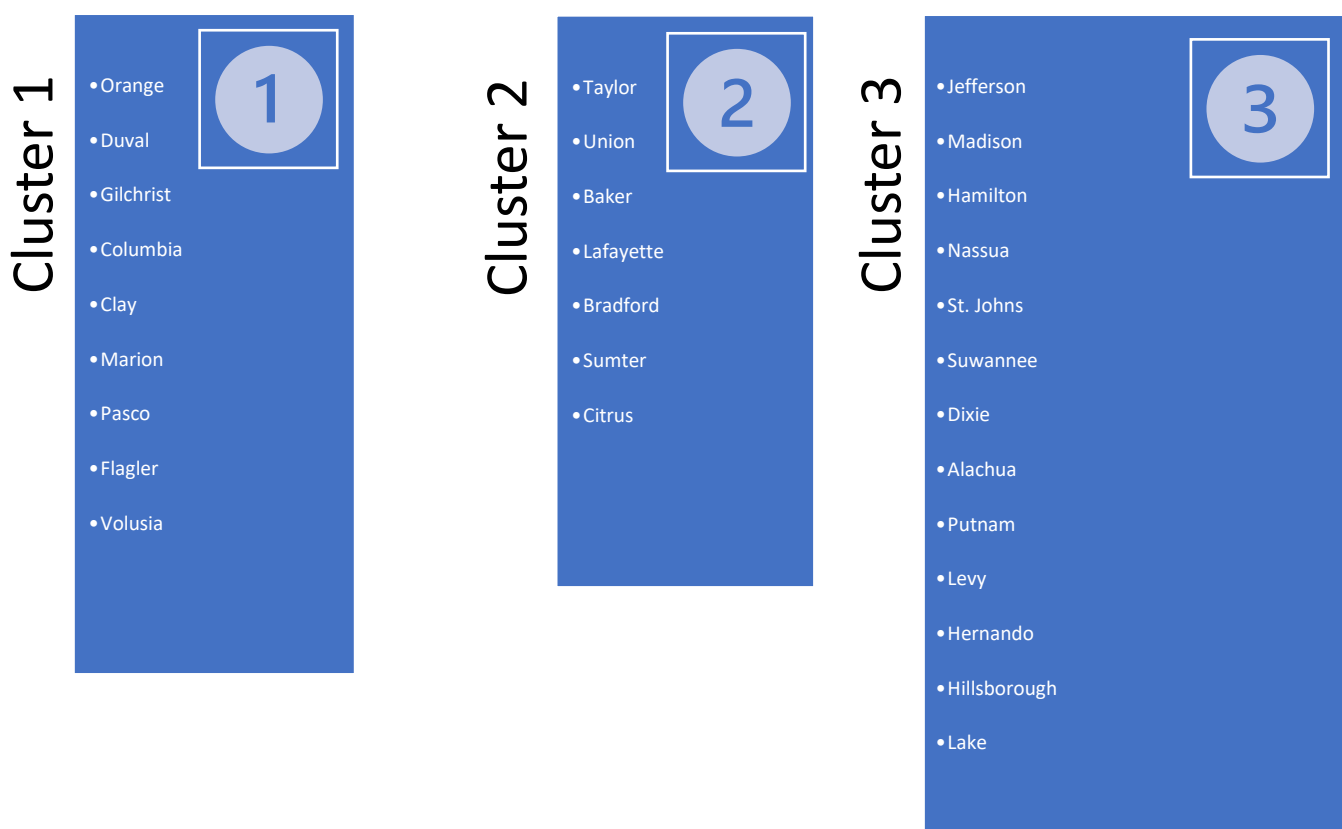


Kmode Analysis

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 clustering⁸ 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



⁸ 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 occupations⁹ 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.

⁹ 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 Clusters¹⁰

A similar cross comparison of top 10 industries¹¹ 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	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	4	5	3	4	4	5	6	6	6	8	4	5	4	5	4	4	4	4	4	4	4	
Madison	5	5	5	5	5		4	4	5	4	4	4	5	3	5	5	5	6	5	4	4	5	4	4	5	4	4	3	4	
Taylor	5	5	5	4	4	4		5	4	3	4	5	4	4	6	3	6	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	4	5	3	4	4	4	4	3	4	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	4	3	2	3	3	6	3	7	4	5	6	8	5	5	5	4	
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		

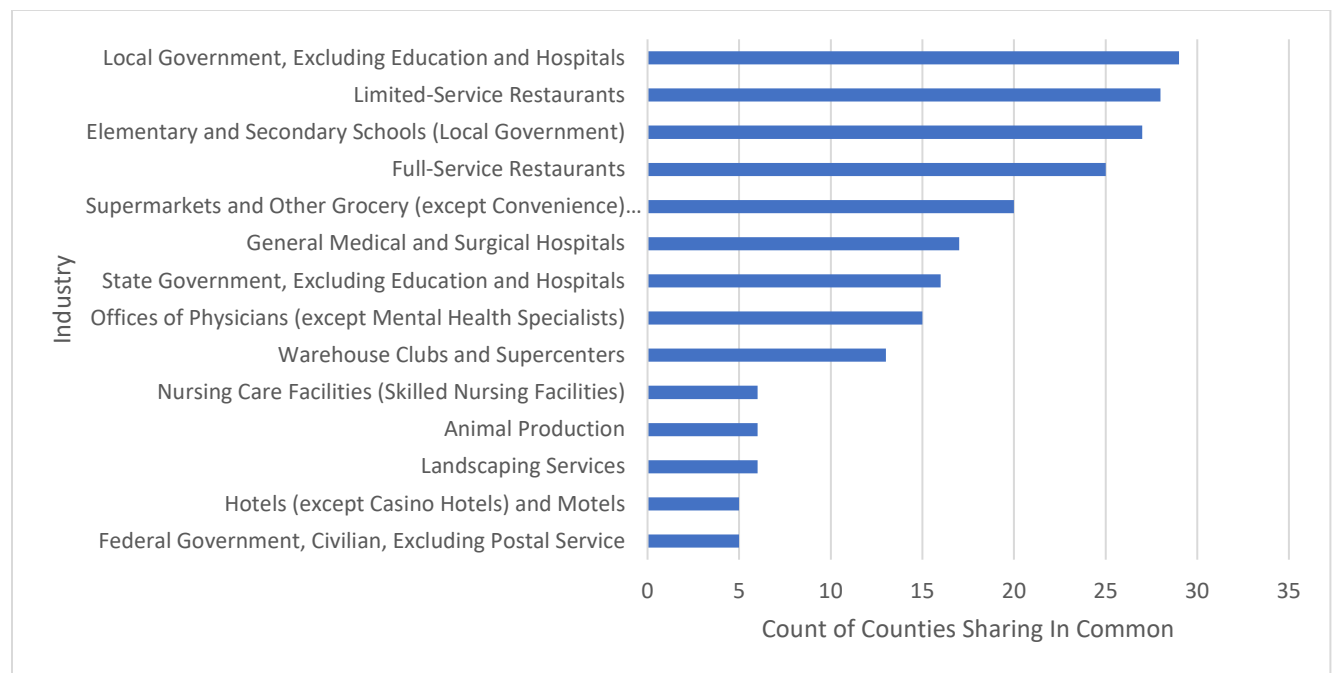
Figure 39. Cross Comparison of Top Industry By County For Citrus, Marion, Levy

	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

¹⁰ 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>

¹¹ 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

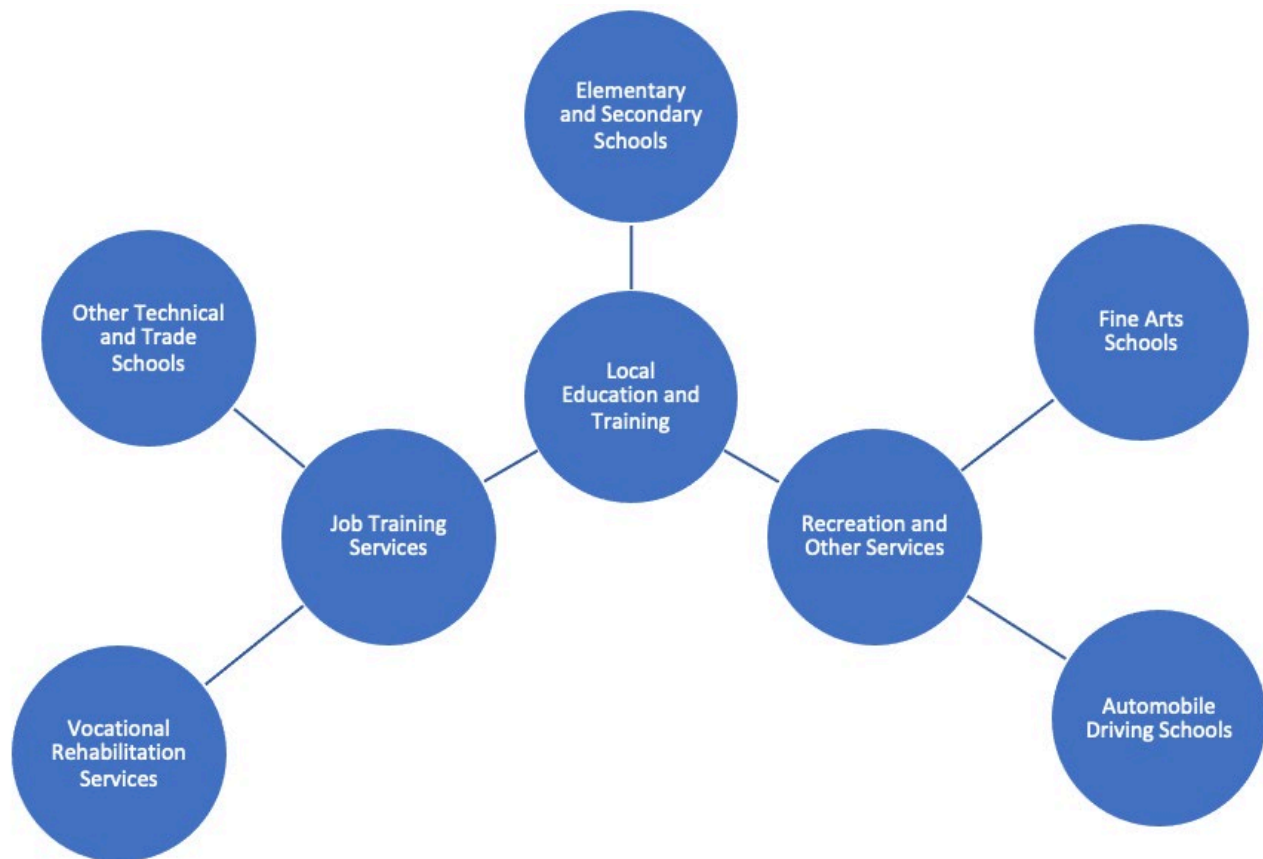


Figure 42. Related Industry Web For Full-Service Restaurants and Limited-Service Restaurants

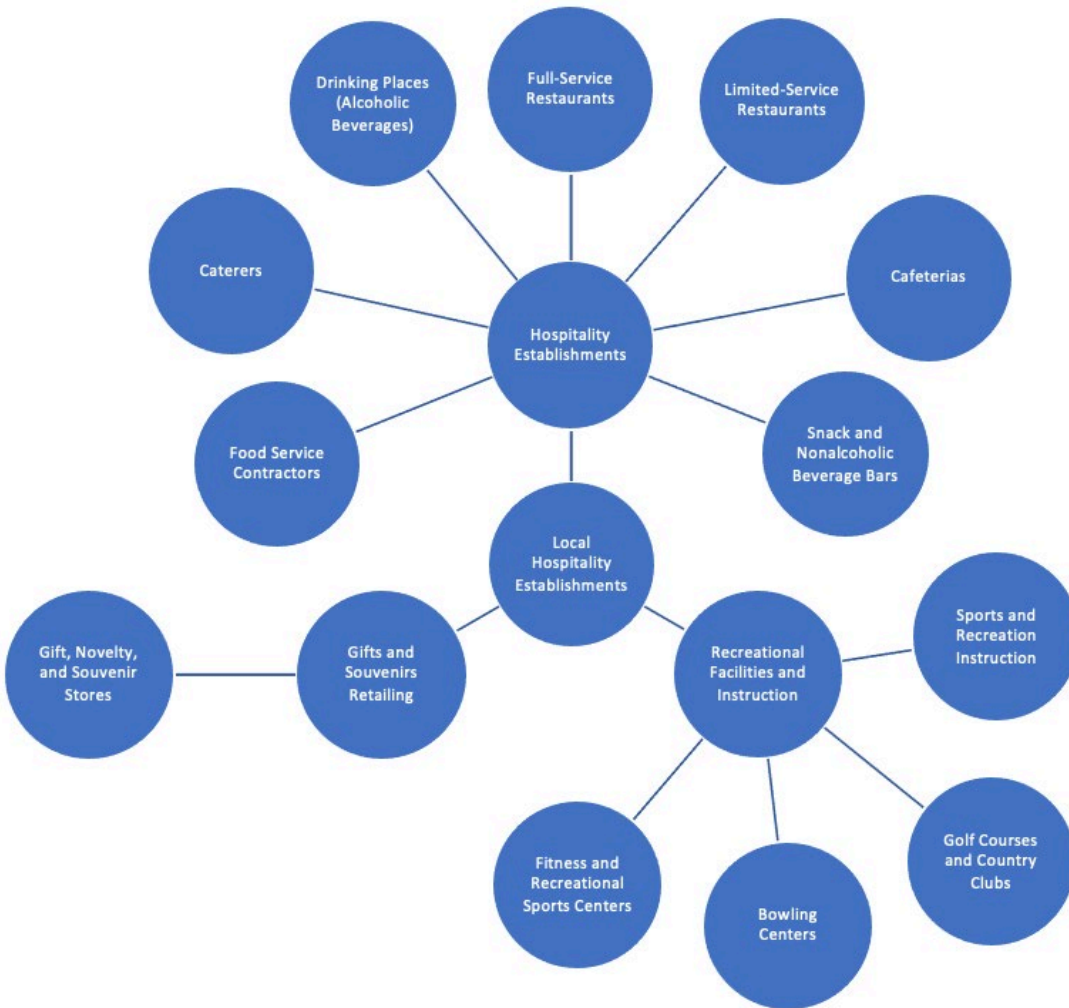


Figure 43. Related Industry Web For Supermarkets and Other Grocery (except Convenience) Stores



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

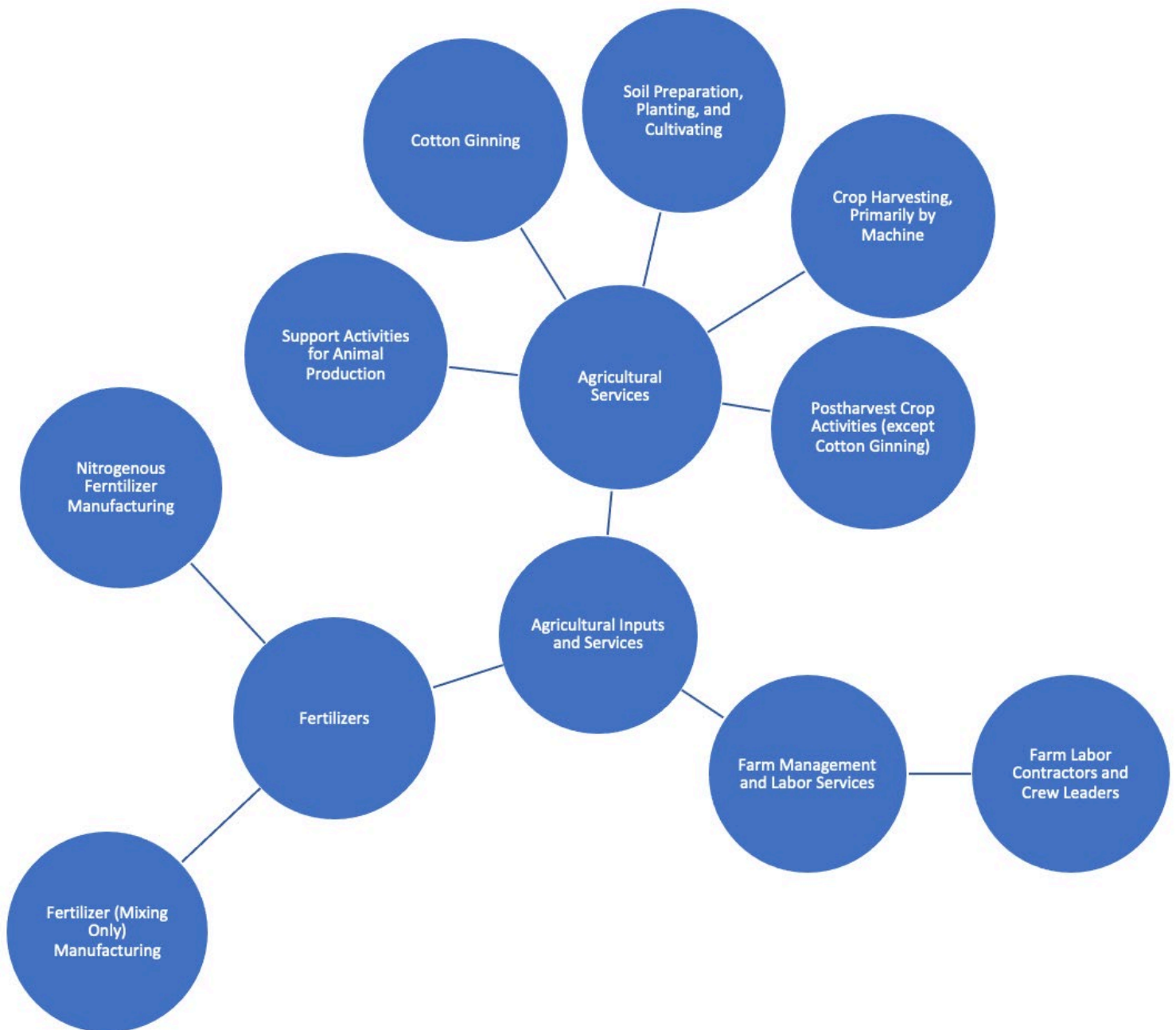


Figure 47. Related Industry Web For Landscaping Services

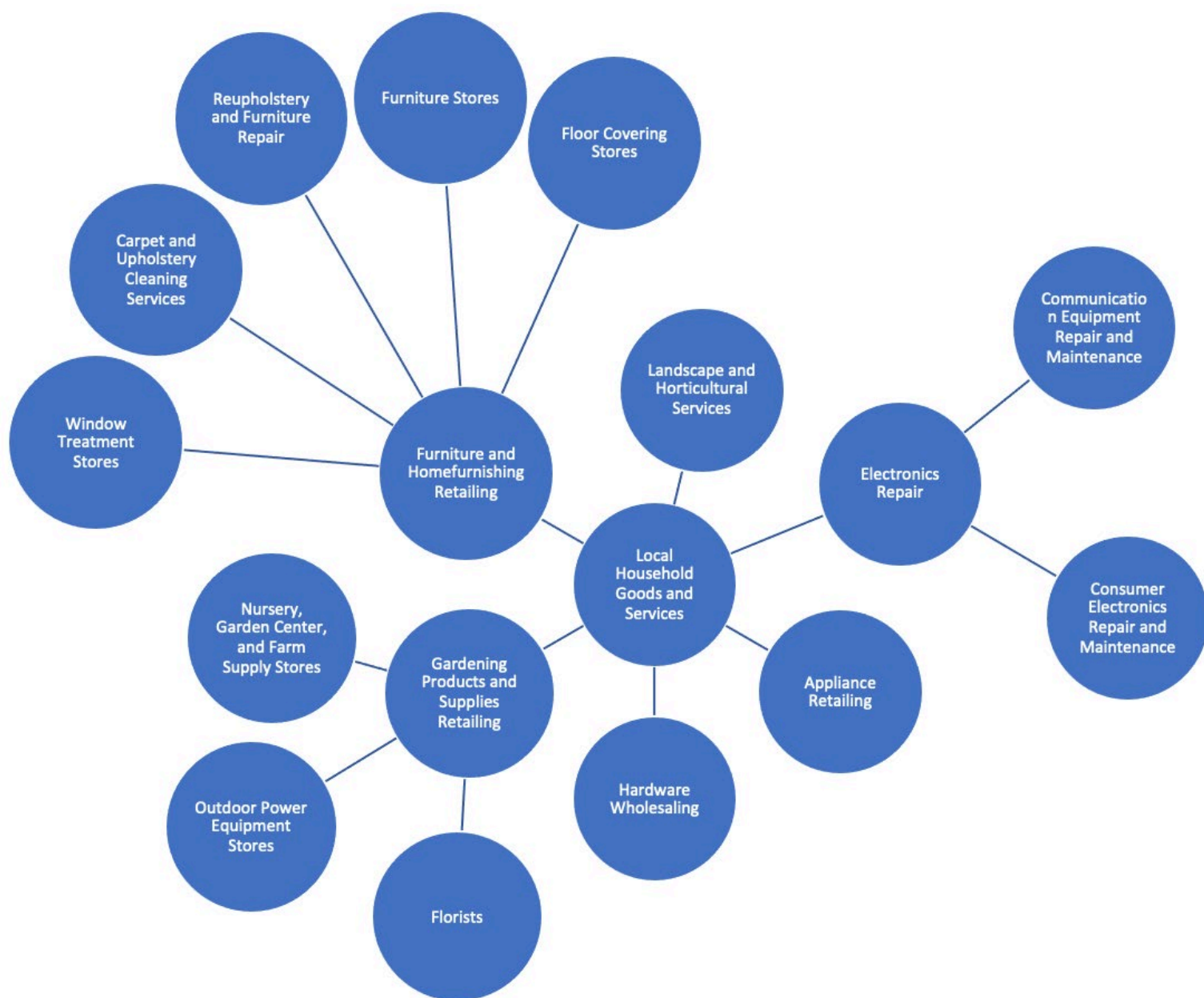


Figure 6. Related Industry Web For Hotels



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

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

Top 5 Outflow Counties:	Average Percent of All Outflow Residents
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

Proportion	
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%



Strategic Policy

Title:	Regional Planning Areas Strategic Policy
Adopted:	
Effective:	

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](#)



Title:	Education and Industry Consortiums
Adopted:	
Effective:	

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

Title:	Eligible Training Providers List Requirements		
Program:	Workforce Innovation and Opportunity Act		
Effective:	3/1/2016	Revised:	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 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 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 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 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. Quality¹ 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);

¹ 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. 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.

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.



RECORD OF ACTION/APPROVAL

Executive Committee, Wednesday, September 13, 2023
Board Meeting, Wednesday, September 27, 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:

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

Board Meeting
Wednesday, September 27, 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 Marion

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:

Endorse recommending to our Consortium that we regionally plan with LWDA 6, 7 and 9.

Approve sending Dr. Shapiro's report to those boards with a request that they seek their elected official approval to regionally plan together and that their CLEO notify the Governor of this desire.

COMMITTEE ACTION:

BOARD ACTION:



RECORD OF ACTION/APPROVAL

Board Meeting
Wednesday, September 27, 2023

TOPIC/ISSUE:

Building Pathways to Infrastructure Jobs Grant

BACKGROUND:

We applied for grant funding (July 6, 2023) to assist with developing training programs and delivering a talent pipeline creation to support federal and state efforts in bringing broadband services to rural areas across America.

POINTS OF CONSIDERATION:

We received notice on September 25, 2023 that we were awarded the grant funding in the amount \$1.73 million dollars that will span a five year performance period and will allow us to regionally plan and coordinate training services to support talent pipeline development for broadband infrastructure activities in Levy County and the counties in workforce regions 6 (CareerSource North Florida) and 7 (CareerSource Florida Crown) to the north of us. Budget attached.

STAFF RECOMMENDATIONS:

Accept the funding award in the amount of \$1.73 million.

COMMITTEE ACTION:

BOARD ACTION:

	Lead Organization - CareerSource Citrus Levy Marion	PY 2023-2024	PY 2024-2025	PY 2025-2026	PY 2026-2027	PY 2027-2028	Total
	Personnel - Direct Charge						
1	Grant Coordinator @ 50,000.00 annually including annual COLA	\$50,000	\$51,500	\$53,045	\$54,636	\$56,275	\$265,456
	Fringe Benefits - Direct Charge						
1	Total Personnel Fringe @ 40.52%	\$20,260	\$20,868	\$21,494	\$22,139	\$22,803	\$107,563
	FICA - 7.65%, Insurance - 27.00%, Retirement - 5.00%, UC - .12%, Workers Comp - .75%						
	Travel						
1	Staff Travel	\$5,500	\$2,000	\$1,500	\$1,500	\$500	\$11,000
	Marketing and Outreach Direct Charges						
1	Advertising, outreach and print collateral	\$7,500	\$7,500	\$5,000	\$2,000	\$750	\$22,750
	Supplies						
1	Office Supplies/Materials Shipping	\$200	\$200	\$200	\$200	\$200	\$1,000
	Facility Rental Costs for Recruiting, Training and Convening Partners						
1	Rental Fees	\$3,000	\$3,000	\$5,000	\$2,000	\$1,000	\$14,000
	Participant Costs						
1	Fiber Bootcamp Tuition @ \$2800 per trainee	\$28,000	\$28,000	\$28,000	\$22,400	\$5,600	\$112,000
	Commercial Driver Training @ \$6000 per trainee	\$0	\$12,000	\$24,000	\$12,000	\$12,000	\$60,000
	Project Management @ \$1200 per trainee	\$0	\$1,200	\$2,400	\$2,400	\$1,200	\$7,200
	Network Technicians @ \$2500 per trainee	\$0	\$2,500	\$5,000	\$5,000	\$2,500	\$15,000
2	On the Job Training @ \$4000 average per trainee	\$40,000	\$56,000	\$56,000	\$32,000	\$20,000	\$204,000
4	Incumbent Worker @ average of \$1500 per trainee	\$3,000	\$6,000	\$6,000	\$3,000	\$3,000	\$21,000
5	Paid Work Experience @ average of \$7500 @ \$21/hour	\$7,500	\$15,000	\$15,000	\$7,500	\$7,500	\$52,500
6	Supportive Services @ average of \$500 per trainee	\$5,000	\$5,000	\$5,000	\$4,000	\$1,000	\$20,000
	Lead Organization Program Costs						
1	Direct Costs	\$86,460	\$85,068	\$86,239	\$82,475	\$81,528	\$421,769
2	Participant Costs	\$83,500	\$125,700	\$141,400	\$88,300	\$52,800	\$491,700
	Indirect Cost Rate and Cost Allocation Pools/Infrastructure						
1	Indirect cost rate @ 17.00%	\$13,508	\$13,508	\$13,083	\$12,573	\$12,190	\$64,862

[illegible]



RECORD OF ACTION/APPROVAL

Board Meeting
Wednesday, September 27, 2023

TOPIC/ISSUE:

Building Pathways to Infrastructure Jobs Grant – Subrecipients

BACKGROUND:

We will be the lead agency for the Building Pathways to Infrastructure Jobs Grant. Our grant application had joint work occurring in workforce regions 6 (CareerSource North Florida) and 7 (CareerSource Florida Crown) spanning the rural areas between Levy County to the Georgia line.

POINTS OF CONSIDERATION:

As the lead agency we will need to execute subrecipient agreements to administer funding to the other participating workforce regions for their portion of the work contained in the grant's scope of work. Each region's agreement will be in the amount of \$240,750.

STAFF RECOMMENDATIONS:

Allow us to execute subrecipient agreements with CareerSource North Florida and CareerSource Florida Crown.

COMMITTEE ACTION:

BOARD ACTION:



RECORD OF ACTION/APPROVAL

Performance and Monitoring Committee, Tuesday, August 15, 2023
Board Meeting, September 27, 2023

TOPIC/ISSUE:

Independent Monitoring Services Contract

BACKGROUND:

A Request for Proposal was issued on 6/12/2023 for an independent monitor. The contract with Indelible Solutions/Underwood Sloan and Associates expired on 6/30/2023. The RFP ended on July 7, 2023. We received one proposal from Underwood Sloan and Associates. There were no other proposals received.

POINTS OF CONSIDERATION:

The board of directors authorized the Performance and Monitoring Committee to make the final decision regarding approval/denial of a contract at the June 7, 2023 meeting of the full board. The initial contract, if executed, will be in the amount of \$50,000.00 and will be effective through June 30, 2024 with a renewal on a yearly basis. This contract may be renewed up to an additional 3 times for a 4-year total.

STAFF RECOMMENDATIONS:

Approve a contract with Underwood Sloan and Associates to commence engagement for third party monitoring.

COMMITTEE ACTION:

Al Jones made a motion to accept the independent monitoring contract. Brandon Whiteman seconded the motion. Motion carried.

BOARD ACTION:



RECORD OF ACTION/APPROVAL

Nominating Committee, Monday, August 28, 2023
Board Meeting, September 27, 2023

TOPIC/ISSUE:

Nomination of Vice Chair

BACKGROUND:

The current Vice Chair is stepping down. A replacement will need to be appointed for the remainder of the 2023-2024 program year. The Vice Chair replacement must be from Citrus County to comply with the policy to rotate the Chair between the region's counties.

POINTS OF CONSIDERATION:

STAFF RECOMMENDATIONS:

COMMITTEE ACTION:

Kevin Cunningham made a motion to nominate Carl Flanagan for Vice-Chair for the remainder of the 2023-2024 program year. Charles Harris seconded the motion. Motion carried.

BOARD ACTION:



RECORD OF ACTION/APPROVAL

Executive Committee, Wednesday, September 13, 2023
Board Meeting, Wednesday, September 27, 2023

TOPIC/ISSUE:

Severance pay plan

BACKGROUND:

Severance pay was approved by the board on June 7, 2023, for staff reductions. We would like to formalize this severance pay plan into our personnel handbook. This will amend the policy to exclude contracted staff and the CEO.

POINTS OF CONSIDERATION:

Below are the details of the previously approved plan to be added to our personnel handbook.

- Full-time staff may receive severance in the amount equal to 160 hours.
- Part-time staff may receive severance in the amount equal to 96 hours (based on average hours worked for part-time positions).
- All staff impacted will be placed on administrative leave and paid through the end of the current pay period in which the reduction occurs.
- Severance payments will be made on the staff member's final pay statement.
- Excludes contracted employees and CEO.

STAFF RECOMMENDATIONS:

Approve the amended severance pay plan.

COMMITTEE ACTION:

Carl Flanagan made a motion to accept the amended severance pay plan that will be added to the employee handbook. Charles Harris seconded the motion. Motion carried.

BOARD ACTION:



RECORD OF ACTION/APPROVAL

Executive Committee, Wednesday, September 13, 2023
Board Meeting, Wednesday, September 27, 2023

TOPIC/ISSUE:

2023 Workforce Professional Development Summit

BACKGROUND:

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

POINTS OF CONSIDERATION:

CLM support will enhance the quality of the Summit

STAFF RECOMMENDATIONS:

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

COMMITTEE ACTION:

Carl Flanagan made a motion to approve the \$5000 sponsorship for the 2023 Workforce Professional Development Summit. Pete Beasley seconded the motion. Motion carried

BOARD ACTION:



RECORD OF ACTION/APPROVAL

Performance and Monitoring Committee, Tuesday, August 15, 2023
Executive Committee, Wednesday, September 13, 2023
Board Meeting, Wednesday, September 27, 2023

TOPIC/ISSUE:

Independent Monitoring Services Contract

BACKGROUND:

A Request for Proposal was issued on 6/12/2023 for an independent monitor. The contract with Indelible Solutions/Underwood Sloan and Associates expired on 6/30/2023. The RFP ended on July 7, 2023. We received one proposal from Underwood Sloan and Associates. There were no other proposals received

POINTS OF CONSIDERATION:

The board of directors authorized the Performance and Monitoring Committee to make the final decision regarding approval/denial of a contract at the June 7, 2023 meeting of the full board. The initial contract, if executed, will be in the amount of \$50,000.00 and will be effective through June 30, 2024 with a renewal on a yearly basis. This contract may be renewed up to an additional 3 times for a 4-year total.

STAFF RECOMMENDATIONS:

Approve a contract with Underwood Sloan and Associates to commence engagement for third party monitoring.

COMMITTEE ACTION:

Performance and Monitoring: Al Jones made a motion to accept the independent monitoring contract. Brandon Whiteman seconded the motion. Motion carried.

Executive: Charles Harris made a motion to accept the independent monitoring contract with Underwood Sloan and Associates. Carl Flanagan seconded the motion. Motion carried.

BOARD ACTION:



RECORD OF ACTION/APPROVAL

Executive Committee, Wednesday, September 13, 2023
Board Meeting, Wednesday, September 27, 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:



RECORD OF ACTION/APPROVAL

Executive Committee, Wednesday, September 13, 2023
Board Meeting, Wednesday, September 27, 2023

TOPIC/ISSUE:

Dislocated Worker fund transfer

BACKGROUND:

Under WIOA local workforce development boards can transfer up to 100% of funding between the Adult and Dislocated Worker programs. Transfers may be done locally up to 25% of the total annual fund allocation. Transfers over 25% of the total annual allocation require formal approval from Florida Commerce.

POINTS OF CONSIDERATION:

We are looking to transfer \$800,000 from our allocation of Dislocated Worker funding and move to Adult Individual Training Account (ITA) funds. We are currently unable to spend our full allocation of DW funding due to low unemployment numbers. This transfer will allow us to increase our AD training enrollments from an estimated 187 to 320.

STAFF RECOMMENDATIONS:

Approve the transfer of funding from Dislocated Worker to Adult.

COMMITTEE ACTION:

Pete Beasley made a motion to approve the transfer of funding from Dislocated Worker to Adult Training. Kim Baxley seconded the motion. Motion carried.

BOARD ACTION: