

## Program Year 2023 Unrelated Contracts over \$35,000

AGENCY		LENGTH		AMOUNT	Comments
Name	Description	Dates	Expires	Amount	
Eckerd	Service Provider	7/1/2023	6/30/2024	\$1,196,555.60	Renewable until 6/30/2025
Southern Indiana Works	OSO	7/1/2023	6/30/2024	\$75,000.00	Renewable until 6/30/2027
DTW Lecanto	Lecanto Office Lease	7/10/1905	10/31/2023	\$54,000.00	
Fran Property Investments	Chiefland Office Lease	7/1/2019	6/30/2024	\$47,602.95	



**CITRUS LEVY MARION REGIONAL WORKFORCE  
DEVELOPMENT BOARD, INC. (CLMRWDB)**

**d/b/a  
CAREERSOURCE CITRUS LEVY MARION**

**MODIFICATION NUMBER 3  
FOR PY 2023/2024**

**COST REIMBURSEMENT/PERFORMANCE BASED CONTRACT  
PACKAGE**

**WITH**

**Eckerd Connects**

**TO PROVIDE PARTICIPANTS**

**SERVICES TO  
WORKFORCE INNOVATION AND OPPORTUNITY ACT  
CUSTOMERS**

## **CONTRACT MODIFICATION - 3**

The Citrus Levy Marion Regional Workforce Development Board, Inc., d/b/a CareerSource Citrus Levy Marion, hereby modifies the contract for Eckerd Connects, under the Workforce Innovation and Opportunity Act (WIOA). This modification will affect the contract numbered PY21-LOA-06 and will be in effect on July 1, 2023. This modification designates the continuance of contract operations to the service provider Eckerd Connects for the program year July 1, 2023 through June 30, 2024. The continuance of this contract provider was approved by the CareerSource Citrus Levy Marion board on June 7, 2023 and will remain in effect for the life of agreement which is set to expire on June 30, 2024. The requested representative with signatory authority on this agreement shall be Randall W. Luecke, Chief Financial Officer.

This modification contains the Contractual obligation for a total amount not to exceed **\$1,196,555.60** which shall be reimbursed by the Grantee for the provision of services as outlined in the contract.

The following Exhibits of the contract are modified as stated below: Either No Change or Changed.

1. **Contract Dates (Exhibit 1):** Changed
2. **Scope of work (Exhibit II):** Changed
3. **Budget (Exhibit III):** Changed
4. **Performance Requirements (Exhibit IV):** Changed
5. **Job Descriptions & Resumes (Exhibit V):** Changed
6. **Salary Structure (Exhibit VI):** Changed
7. **RFP Page Noting Option to Renew (Exhibit VII):** No Change
8. **Report of Additional Funding/Expenditures (Exhibit VIII):** No Change
9. **Sub-recipient DUNS number and Federal Award Identifiers (Exhibit IX):** Changed
10. **Authorization to Incur Travel (Exhibit X):** Changed
11. **Contract Disclosure Statement (Exhibit XI):** Changed
12. **Signature Page:** A new signature page is attached for signatures for this modification.
13. This contract Modification Number 1 will be effective no sooner than July 1, 2023.
14. This contract modification will be included in the contract as referenced and will be attached to the contract as Modification Number 3 for contract number PY22-LOA-06.
15. The remainder of the contract not modified by this contract modification shall remain in full force and in effect.
16. This contract is funded 100% through funding from the Department of Labor. No portion of this contract contains non-Federal funding.



## **EXHIBIT I – Contract Dates**

**July 1, 2023 through June 30, 2024**

## EXHIBIT II - Statement of Work/Scope of Work

**Program Summary/Objective:** Program objective for the Contractor is to help youth develop lifelong skills, while overcoming obstacles and barriers, through a seamless integration of case management and workforce preparation services in the Citrus Levy Marion workforce region (region 10). The Contractor will ensure accessibility of services to at-risk youth in Citrus, Levy and Marion counties. This will be accomplished through partnerships with the workforce system, educational partners, community and social service agencies and organizations. Objectives/quantities are outlined in the below services/work plan.

**Services/Work Plan:** The Contractor will provide services to the existing carryover caseload of approximately **69** participants and will recruit and enroll **90** additional out-of-school participants during the **2023-2024** program year throughout the three-county area. Eckerd Connects will enroll based on WIOA (Workforce Innovation and Opportunity Act) standards of no less than 75% out of school participants. The contractor will serve a total of **159** participants (**69 rollovers + 90 new enrollments**). Out of the **90** new enrollments, Eckerd Connects will dually enroll up to **25** candidates into YouthBuild/WIOA for intensive services. The contractor staff will provide follow-up services to approximately **111** young adults during this program year. An enrollment is defined by determining Workforce Investment Opportunity Innovation Act (WIOA) eligibility and creating participation in the State system.

In addition to the youth services, the contractor will collaborate with CareerSource Citrus Levy Marion (CSCLM) with efforts to assist in other service areas at the Chiefland office location in Levy County to meet its service needs. The contractor will contribute approximately 60% of staff time under Adult/DW funding to perform such duties with the CareerSource Levy County Chiefland location. CSCLM will provide the training components and supervision with the other service areas of this assigned staff, along with the assistance of Eckerd Connects. The Contractor will follow CSCLM policy and procedures within these assigned areas of need.

Upon enrollment into the program, Contractor staff will enter accurate and timely information on the participants profile in Employ Florida (EF). The individual's academic abilities and career interests will be used to develop an Individual Service Strategy (ISS) that will outline the activities and goals that will be established with the participants to assist them in attaining a youth positive outcome as defined by the WIOA performance measures. As the participant progresses in the program and/or their interest changes, the ISS will be modified to reflect such changes. Goals will be entered and managed according to Department of Economic Opportunity (DEO) and CSCLM program policy and guidance. Literacy and numeracy pre-test and post-test data will be entered for all participants. Contractor will offer participants an orientation to WIOA program services, provide objective assessment, basic skills assistance, employability skills, occupational skills training per eligibility, opportunities to identify a career pathway that may lead to nationally recognized credential attainment, job shadowing, work experience, placement assistance, follow-up services and access to the 14 WIOA program elements. These services will be outlined in the participants Individual Service Strategy (ISS). The ISS will be regularly monitored, maintained, and updated by case management staff.

**Community Outreach:** It is expected that the Contractor will participate in a variety of community events and conduct regular outreach to community contacts, including young adult groups, churches, schools, juvenile justice officials, and families to recruit eligible participants. The Contractor will also participate in a variety of job seeker and employer events to meet the demand of local industry to recruit, hire, train, and retain the local workforce. The Contractor will also coordinate all public information activities with the director of program development. The Contractor staff will meet regularly with CSCLM director of program development or other designee to coordinate the origination, production, and distribution of all marketing material for CSWB's (CareerSource Workforce Board) young adult program, which will include the CSWB, and ADA (Americans with Disabilities Act) required information. The CSCLM logo will be utilized on all marketing materials related to the promotion of young adult workforce services. These provisions do not apply to the Contractor's company or corporate marketing materials or activities that do not relate to the local project.

**Availability of Services:** The Contractor will offer services on a year round basis. Services for out-of-school will be provided five days a week and accommodate individual participant schedules. Services will be offered at a minimum from 8 a.m. - 5 p.m.

Locations will be identified throughout the three county area and will be regularly updated on all program communication. At a minimum, it is expected that the contractor will locate within CareerSource Citrus Levy Marion One Stop Centers. Additional community-based locations, such as Howard Academy, MTC (Marion Technical College), WTC (Withlacoochee Technical College), Hampton Center and CF (College of Central Florida) may be used to increase service delivery to hard to serve communities as needed. Contractor will continue to do outreach with the community to find additional community-based locations to provide services.

**Recruitment:** The Contractor project staff will network within the Citrus Levy Marion County community to identify and recruit WIOA eligible youth, ages 16 to 24, with a primary emphasis on out-of-school youth ages 18-24. The outreach and recruitment of youth and young adults will include, but are not limited to, social media, word of mouth, face to face visits to community events, recruitment flyers, and school connections. If it is in the best interest of a referred participant to obtain services elsewhere, Contractor staff will make appropriate referrals. Participants that are not eligible for WIOA will be referred to appropriate partners. All recruitment marketing tools developed by the Contractor will be submitted to Workforce designee for final approval prior to use.

**Target Group(s):** The Contractor focus is to provide services to targeted groups that are WIOA eligible and participants that are facing one or more of the following categories according to Training and Employment Guidance Letter (TEGL) 21-16 :

- |   |  |
|---|--|
| • A school drop-out   | most recent complete school year calendar quarter                                  |
| • Youth within age of compulsory school attendance but not attended school for at least | • Recipient of secondary school diploma or recognized equivalent who is low income |

- individual and either : Basic skills deficient or An English language learner
- Homeless individual or runaway
- In foster care or aged out
- Pregnant or parenting youth
- An individual with a disability
- An offender
- A low -income individual who requires additional assistance enter or complete an educational program or to secure or hold employment

**Eligibility Assessment/WIOA Registration:** All participants must be WIOA eligible to receive young adult workforce services. Ineligible participants will be referred to CareerSource Citrus Levy Marion (CSCLM) for other opportunities as appropriate. Not all participants will be suitable for workforce services. The Contractor staff will gather all required eligibility documents, determine eligibility, and input the information into the management information system (EF). Cases will be checked and reviewed by Eckerd Connects management/lead team for eligibility and accuracy prior to being data entered into EF. The Comprehensive Adult Student Assessment Systems (CASAS) or Test of Adult Basic Education (TABE) will be used only for basic skills assessment to establish standardized Reading and Math grade levels.

**Assessments:** Upon participation selection, Contractor staff will facilitate intake and assessments through appropriate resources to include an assessment to determine interests, values, aptitudes, and preferences. The Contractor will examine the participant's work experience, basic skills levels, career interests, and career aptitudes that will lead to identifying career pathways. This will also help staff members in developing the ISS with the participant to identify which WIOA elements will help them become successful in finding employment or enrolling into secondary education. Participants may receive Career Pathway exploration, Basic Skills, Occupational Skills Training, Work Readiness Training and Work-Based Learning, Placement and Follow up Services based on their needs which will be determined from various assessments and/or one to one assessment. The Contractor's staff will conduct a comprehensive Objective Assessment Summary of each participant's needs to identify barriers or hardships that may exist and need to be addressed prior to pursuing comprehensive services, including training opportunities. Staff will also review assessments, including CASAS or TABE, and other diagnostic testing to determine if a participant has the academic aptitude and interest to pursue training services.

**Development of an Individual Service Strategy:** Once eligibility determination has been made, participants will work with their own career coaches for development of an Individual Service Strategy (ISS) and develop goals to complete while enrolled. Goals will be monitored through case management, ISS planning and use of Employ Florida. The Career Coach assesses each participant enrolled in the program to deliver effective services resulting in growth and development in the timeframe that is most appropriate for everyone. Since our instruction is targeted and individualized, we precisely identify participant needs and help determine a relevant pathway to success. We will use Motivational Interviewing techniques to ascertain service objectives, academic levels, goals, interests, skill levels, abilities, aptitudes, supportive services, barriers, and strengths.

Our in-depth interview process includes a review of basic and occupational skills, prior work experience, employability potential and developmental needs. Assessment results are incorporated into the collaborative plan created by the participants and the Contractor staff, which is constantly reviewed and

updated. The Career Coach, in partnership with each participant, develops an Individual Service Strategy (ISS). The ISS considers each participant's career and educational goals, training and employment ambition, assessment results, educational backgrounds, barriers to employment, and supportive service needs, while establishing clear objectives designed to empower participants while propelling them toward individual achievement.

ISS goals are comprehensive, including scheduled activities, timeframes for goal achievement, and specific action steps that will allow each participant to meet his/her objectives. Goals are developed collaboratively, with the participant identifying the best avenue for achieving success and Contractor staff providing guidance and insight regarding available resources. The ISS planning process concludes with a variety of services and a defined action plan for implementing activities that will achieve success. The Career Coach provides ongoing assessment of participants' capabilities and supportive service needs and updates the ISS, as necessary.

**Virtual Instruction Option:**

Virtual (remote) instruction may be offered, where workshops may be scheduled for direct instruction, with a facilitator leading the training via telephone or internet Q&A response to polls, and or discussion via telephone. Virtual instruction may also include a pre-recorded workshop, with handouts and training activities that may have to be submitted via a screenshot or email response. The Contractor has identified below the type of instruction available for the participant to engage in based on needs and resources available. Any service needed will be identified in the ISS and documented in case file with activities and case noted in the EF system. The size of these trainings may vary, but typically are between 1-15 participants.

Blended model instruction may be offered to allow participants the opportunity to complete base level course work and reading on their own time using virtual formats; however, it may be required for them to report to a live training session for test administration, interactive assignments, and lessons. The size of these trainings may vary, but typically are between 1-10 participants.

**Work Readiness Skills:** Contractor staff will offer small group and/or one-on-one pre-employment workshops, using facilitator led, interactive workshops to participants to increase his/her knowledge in workforce development to include, but not limited to: health and safety precautions (hygiene) which may include Safe Staff Food Handler training, other career pathway occupational trainings, effective job search techniques, working effectively with others, stress and time management, labor market, financial literacy, interviewing skills, resume preparation, appropriate work attire, and effective employee skills to advance and retain employment. Individual guidance to participants may also be provided with work readiness training skills in addition to or in lieu of small group workshops. Based on reports from community training sites all participants will be provided training on taking initiative in the workplace during their work readiness skills training with Develop U.

**Career Pathways Exploration:** Within Work Readiness Training, Contractor staff will provide each participant with an opportunity to explore career options, understand the local labor market information, and how it can inform the selection of a career cluster, field, or pathway. The ISS will be developed to

support the participant's needs and goals. The participant will have the opportunity to receive training based on career clusters or pathways including but not limited to:

- |                       |                |                  |
|-----------------------|----------------|------------------|
| ➤ Hospitality/Tourism | ➤ Retail/Sales | ➤ Administrative |
| ➤ Health Sciences     | ➤ Construction | ➤ Manufacturing  |

**Occupational Skills Training:** Contractor staff may offer occupational skills training as it relates to career pathways. Occupational Skills training can be provided by referring to the CareerSource Florida Master Credential list, found in the link below:

<https://careersourceflorida.com/boardroom/florida-credentials-review-committee/master-credentials-list/>

Examples of the Occupational Skills training that may be provided can be found in the list below:

- |   |   |
|---|---|
| <ul style="list-style-type: none"><li>• HBI PACT (Pre-Apprenticeship Certificate Training) CORE</li><li>• HBI PACT Carpentry</li><li>• GED/High School Diploma</li><li>• ServSafe Certified Food Manager</li><li>• Microsoft Office Specialist and/or Excel, Word, PowerPoint</li><li>• QuickBooks Certified User by Intuit</li><li>• Certified Phlebotomy Technician</li></ul> | <ul style="list-style-type: none"><li>• Certified Nursing Assistant</li><li>• 911 Public Safety Telecommunication</li><li>• Florida Correctional Officer</li><li>• Certified Veterinarian Assistant</li><li>• Certified Landscaping Technician</li><li>• Other Approved National Credential Certifications as listed on the CareerSource Florida Master Credential List</li></ul> |
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Contractor may also incorporate activities (guest speakers, field trips, tours, job shadowing) that will expose participants to the skills and learning needed to pursue employment opportunities within those industries.

Contractor will ensure all participants attend a live or virtual tour of the CareerSource Center to familiarize themselves with available services, staff, and standard office operations before completion of their programs. Participants will have opportunities throughout their programs to attend employability skills seminars and job fairs, conduct job searches, interview with potential employers, and attend motivational presentations conducted by trained professionals providing career exploration, job search techniques, and job retention strategies as available with CareerSource. This early introduction to CareerSource will provide a clear understanding of the services available through CareerSource to meet their future workforce needs.

**Measurable Skills Gain:** The Contractor will provide annual documented skills gains to a minimum of 80% of participants that are enrolled in triggering activities (i.e., 416, 429, 430, etc.) in one of the following activities: adult/basic education, basic skills/tutoring, or occupational skills training. Completion with one of the skill or achievement types available (Post-secondary Transcript/Report Card, Secondary Transcript/Report Card, Training Milestones, Skills Progression) will be documented in EF in accordance with the CareerSource Citrus Levy Marion local operating policy.

**Basic Skills Tutoring/Remediation:** Contractor staff will incorporate various methods to provide basic skills remediation; tutoring and study skills training that will lead to literacy and numeracy skill increases and/or preparation for participants obtaining their GED/High School Diploma improving their basic skills literacy. The Contractor will utilize various methods to include print materials and online remediation resources, alternate adults' high school diploma options, as well as

referrals to local adult education centers and dropout recovery alternative.

Literacy and numeracy levels will be monitored for all participants determined basic skills deficient at registration and participants who do not possess a high school diploma or GED at enrollment. If the participants are basic skills deficient, progress and attainment data will be entered and monitored in EF.

**Additional Online Training:** Work Readiness Preparation, Career Pathways Exploration, Occupational Skills Training and Basic Skills Tutoring/Remediation can be provided through use of Metrix Learning an approved online learning management system that helps jobseekers upgrade their skills and gain certifications to secure employment, found in link below:

<https://careersourceclm.metrixlearning.com/>

**Required WIOA program elements available:** The following 14 WIOA youth program elements are made available to each participant during the program. These are independently driven by the participants needs. Any service needed will be identified in the ISS and documented with case notes in the EF system. Refer to WIOA Required Program Elements Table Exhibit “A” below:

WIOA Required Program Elements	Provider / Referral Agency	Instructional Activities
<b>1. Tutoring, academic remediation; study skills training, and instruction leading to secondary school completion, including dropout prevention strategies</b>	Eckerd Connects / Public school partners (Marion, Citrus and Levy County School Boards to include Marion Technical College and Withlacoochee Technical College)	Computer based training / instructor facilitated GED Practice, GED Prep materials, Practice GED exams, Metrix Learning (online) and Khan Academy (online) as an online instructional teacher-aided tool that is also used as a one-to-one instructional resource with minimal guidance.
<b>2. Alternative secondary school offerings</b>	Eckerd Connects /Public school partners (Marion, Citrus and Levy County School Boards Alternative Programs)	Florida Sunshine State Standards
<b>3. Summer employment opportunities directly linked to academic and occupational learning</b>	Eckerd Connects / Community Business partners, Community Based Organization (CBO's), and Faith Based Organizations (FBO's)	Year-Round Services will be documented by Eckerd and summer work experience opportunities may be offered based upon assessed need
<b>4. Paid and unpaid work experiences, including internships and job shadowing</b>	Eckerd Connects /Community Business partners, CBO's, FBO's	Eckerd documented Work Experience activities
<b>5. Occupational skills training</b>	Approved Training Provider Partners	Various - Based on identified occupations/career fields on the Targeted Occupations List with Approved Nationally

		Recognized Training Providers
<b>6. Leadership development opportunities, including such activities as positive social behavior and soft skills, decision making, teamwork, etc.</b>	Eckerd Connects/ in connection with various community partner agencies and employers.	Employability Skills, Life Skills instructor led or online curriculum through use of approved online training provider Metrix Learning that includes leadership development, nutrition, family planning, substance abuse prevention, health, and safety.
<b>7. Supportive Services</b>	Eckerd Connects/ in connection with various partner agencies and/or employers	Independently driven by participant needs. Supportive services for interview attire, educational training, and employment activities such as gas cards, bus passes, and other emergency assistance
<b>8. Adult mentoring for at least 12 months</b>	Eckerd Connects/ in connection with partner agencies and employers	Career Coach may provide mentoring during enrollment and in follow-up status. Independently driven by participant needs; Case managed and documented. Volunteers from outside agencies may be considered as mentors.
<b>9. Comprehensive guidance and counseling</b>	Eckerd Connects will refer to community agencies	Ongoing intensive case management to include additional counseling and guidance as needed
<b>10. Follow-up services no less than 12 months after exit</b>	Eckerd Connects	Independently driven by participant needs. Contact with participant, employer, post-secondary entities, job retention coaching, academic support, incentives, support, career, and education counseling. (Continuous service until participant has completed follow-up period of 12 months)
<b>11. Financial Literacy</b>	Eckerd Connects /Community Business partners	Eckerd will provide financial literacy as a part of our work readiness activities in a class setting or individually and/or use of approved online training Metrix Learning curriculum
<b>12. Entrepreneurial Skills Training</b>	Eckerd Connects/Community Business partners	Career Coach to assist youth that may be interested in establishing their own business with research and guidance. Community partners and business shadowing can be used in the area.
<b>13. Activities that help youth transition to postsecondary education and training</b>	Eckerd Connects in connection with local colleges and technical schools	Career Coach can assist with guidance and referrals to colleges or technical schools. They can help with career exploration and what is needed for training/education in the field. We can assist with FAFSA application as needed.
<b>14a. Services that provide labor market and employment information in the local area</b>	Eckerd Connects	Eckerd will provide this information as a part of our work readiness activities in a class setting or individually within in DevelopU ( <a href="#">O*Net</a> )
<b>14b. Education offered concurrently with and in the same context as workforce preparation</b>	Eckerd Connects /Community Business partners	Eckerd may provide basic skills in reading and math to assist young adults while they receive work readiness activities in a class setting or individually and/or use of approved online training Metrix Learning curriculum



**Work-Based Work Experience (WEX) Learning:** The Contractor will provide various work-based learning activities, including but not limited to (field trips, company tours; guest speakers; career fairs; service learning; paid work experience) to support the WIOA requirement 20% of non-admin regional annual youth allocation funds, however this contractor will meet or exceed 25% based on actual budget. Work based learning training sites must offer academic and occupational career exploration and skill development to enhance the participants work readiness skills in preparation for unsubsidized employment. Eckerd Connects is responsible for recruiting not-for-profit, private or public employers in collaboration with CSCLM; determining suitability of the worksite; completing Eckerd Connects worksite agreements with the employers; assigning appropriate participants to the worksites; training worksite supervisors and offering technical assistance; documenting site visits and visiting training sites to meet with training supervisors and/or participants for the purpose of monitoring the participants academic and occupational progress; collecting progress reviews, evaluations and timesheets; and reconciling the information on the timesheets, and processing payroll and delivering checks or wages to participants. The worksite providers will provide academic and occupational onsite education components during the duration of the agreement with the participant. The contractor shall document all activity in EF for tracking purposes. Proper documentation will be maintained in each participant file in the ATLAS system.

**Phoenix Rising YouthBuild Project:** The contractor will enroll, provide case management and training services up to 25 young adults for the new 2021 YouthBuild Grant. In collaboration with CSCLM, Habitat and other partners, Eckerd Connects will coordinate and provide training along with staff supervision of the young adults to assist with completion of each training element. Eckerd Connects staff will input data into the YouthBuild MIS (Management Information System) system of the progress of each participant and provide additional reporting as needed to Program Development & Reporting Manager, and Director of Program Development. Eckerd Connects will follow the YouthBuild grant and guidance of the Director of Program Development. Eckerd Connects will enroll and keep the participants a minimum of 6 months per class and no more than 24 months (about 2 years). The Contractor will provide follow-up services for YouthBuild throughout the remainder of the grant cycle as required.

**Placement Services:** The Contractor will provide individualized placement assistance. The Contractor staff will utilize EF, staffing agencies, the business community, and other means to assist participants in gaining employment. The Contractor staff will meet regularly with CSCLM Vice President of Operations to develop strategies to assist with job placement. The Contractor staff will also continue developing relationships with the armed forces, apprenticeship programs, and post-secondary education institutions to expose participants to further education or training options.

**Incentive and Support Services:** The Contractor will manage and collect documentation to validate the earning of incentives and support service payments to and on behalf of participants. An incentive policy will be developed by the Contractor and forwarded to the Vice President of Operations. Incentives will be based on competencies participants achieve while enrolled in the program. Contractor shall document incentives and supportive services in EF for tracking purposes. Proper documentation will be maintained to track the distribution of such funds.

**File Audit Corrections:** The Contractor will conduct internal monitoring of at least 20 participants electronic files per quarter to ensure all data errors are identified through CSCLM file monitoring and the areas of; *eligibility/enrollment, individual service strategies, activity assignment, incomplete or missing case notes, work experience agreements, participant timesheets, support service documentation, post closure follow-ups* are corrected. The Contractor must ensure all data errors are corrected within 30-days of notification of data error and provide verification of correction to administrative manager.

**Closure of Cases:** The Contractor will review and update the participant files as the goals outlined in the ISS are completed. The staff will obtain verification of placement in employment, post-secondary education, or military verification. If participant enrolled in any triggering activities, additional verifications will be completed. Management

will approve file closures. The Contractor will close any files that have been inactive and not participating in activities in 91 days (about 3 months).

**Follow-Up Services:** The Contractor should provide monthly contact with approximately **90** follow-up cases upon case closure and document in EF. The required post-exit follow-ups must be completed in time and recorded by the end of the first quarter, second quarter, third quarter, and fourth quarter after the participants exit the program. Follow-up services include, but are not limited to, tracking progress on the job, the development of increased skills and certifications, and incentives to support retention and/or completion of education and employment services. Follow-up activities will be appropriately recorded in EF and the required documentation will be placed in the participants' paperless ATLAS file.

**Coordination of Service Delivery and Reporting:** It is expected that the Contractor will participate in all mandatory service collaboration meetings and training organized by CSCLM. The Contractor will attend meetings scheduled with the Director of Program Development to review and discuss performance benchmarks and budget expenditures. The Contractor will submit a quarterly performance and financial report on or after 45-day quarter end of each quarter to monitor service delivery.

**Program Staffing and Point of Contact:** The Contractor will maintain negotiated staffing levels to ensure program delivery. In the event a vacancy occurs, the Contractor will notify the Director of Program Development or designee within 24 hours of such vacancy. The Contractor will maintain a single point of contact with Executive Vice President to ensure ongoing communication regarding contract services and performance.

**Cost Allocation Plan:** The Contractor will submit a cost allocation plan to the Vice President of Operations annually. The cost allocation plan must be signed and certified by the Contractors Finance Manager. The Contractor will designate a contact person for this project who will facilitate invoices and any fiscal inquiries. Refer to Contract Budget Summary Table Exhibit "B" below:

**Contract Budget Summary:**

	<u>YouthBuild A</u>	<u>Youth</u>	<u>Adult</u>	<u>Dislocated Worker</u>	<u>TOTAL</u>
<b>Funding Source - CFDA #s</b>	<b><u>17.274</u></b>	<b><u>17.259</u></b>	<b><u>17.258</u></b>	<b><u>17.278</u></b>	
Operating w/o WEX	\$173,656	\$464,312.27	\$20,000.00	\$20,000.00	\$677,968.27
Operating WEX		\$135,436.73			\$135,436.73
<b>Subtotal Operating</b>	<b>\$173,656</b>	<b>\$599,749.00</b>	<b>\$20,000.00</b>	<b>\$20,000.00</b>	<b>\$813,405.00</b>
Participant w/o WEX	\$216,900	\$57,651			\$274,551.00
Participant WEX		\$108,600			\$108,600.00
<b>Subtotal Participant</b>	<b>\$216,900</b>	<b>\$166,251</b>			<b>\$383,151.00</b>
<b>Total Contract</b>	<b>\$390,556</b>	<b>\$766,000.00</b>	<b>\$20,000.00</b>	<b>\$20,000.00</b>	<b>\$1,196,555.60</b>
<b>Total WEX as % of Allocation</b>		<b>31.86%</b>			<b>31.86%</b>

**Fiscal:** The Contractor will submit a cost allocation plan to the Contract Manager annually. The cost allocation plan must be signed and certified by the company's Finance Manager. Eckerd Connects will designate a contact person for this project who will facilitate invoices and any fiscal inquiries. Accruals will be submitted to the Board's designated staff by

the 10<sup>th</sup> of the month for the previous month, and invoices will be submitted by the 20<sup>th</sup> of the month. Appropriate documentation must be provided for reimbursement.

**Cost Categories for Billing:** To meet State and Federal Reporting requirements, the Service Provider must provide an accounting of costs by customer type (In-School or Out-of-School) and activity (see descriptions below). Costs should be specifically charged to cost categories where possible, and a description of any allocation methodologies utilized should be detailed in the Service Provider’s Cost Allocation Plan.

#### **COST CATEGORY GUIDELINES**

- **In-School Youth**
- **Local Administration (reserved for Board use)**
- **Out of School Youth**

#### **Work Experience Expenditures (non-add, MUST MEET 25% OF YOUTH ALLOCATION LESS ADMIN)**

**Performance Payments:** Performance holdback payments will be paid on a quarterly basis after 45 days (about 1 and a half months) and information is validated and will be contingent upon verification of performance. Verification of data will be cross referenced with EF and/or DEO FL State Indicators of Performance Reports. Refer to Performance Benchmark Table Exhibit “C” below:

#### **July 1, 2023, to June 30, 2024**

**Performance Pay Measure:** Eckerd Connects will have a performance holdback of \$38,300 (5% of total WIOA Youth Contract Award) based on meeting Performance Benchmarks as indicated in the chart below. CareerSource Citrus Levy Marion will pay the agreed upon payment, not to exceed \$38,300 and will be paid in four quarterly installments to be billed 45 days after the end of each quarter and will be paid once performance documentation has been validated.

Performance Benchmark	Definition / Required Performance	Payment
<b>Enrollments</b>	<b>1<sup>st</sup> Quarter-</b> Meet <b>20</b> Enrollments by 9/30/23 <b>2<sup>nd</sup> Quarter-</b> Meet <b>17</b> Enrollments by 12/31/23 <b>3<sup>rd</sup> Quarter-</b> Meet <b>28</b> Enrollments by 3/31/24 <b>4<sup>th</sup> Quarter-</b> Meet <b>25</b> Enrollments by 6/30/24 <i>Eckerd Connects is eligible for enrollment payout providing all enrollments are met by 6/30/2024.</i>	\$1,595.83 per Quarter
<b>Measurable Skills Gain</b>	<b>80%</b> of OSY enrolled in a triggering education or training activity <b>should have at least one measurable skill gain per program year.</b>	\$1,595.83 per Quarter
<b>Employment/ Education Retention Rate 2<sup>nd</sup> Quarter after Exit</b>	<b>75%</b> of participants in education/training activities or unsubsidized employment during the 2nd quarter after exit from the program	\$1,595.83 per Quarter
<b>Employment/ Education Retention Rate 4<sup>th</sup> Quarter after Exit</b>	<b>69%</b> of participants in education/training activities or unsubsidized employment during the 4th quarter after exit from the program	\$1,595.83 per Quarter
<b>Credential Attainment Rate</b>	<b>83%</b> of participants attained an in-demand nationally industry recognized credential and/or secondary school diploma (or recognized equivalent) during participation and/ or within 1 year after exit from the program	\$1,595.83 per Quarter
<b>Median Wages</b>	<b>\$2,800</b> Median Wage of Participants who average at least \$2,800 during the 2nd Quarter after exit from the program	\$1,595.83 per Quarter

For the above Performance Objective, the Contractor may capture, in an appropriate billing period, the payment of a performance benchmark missed in an earlier period if it can prove that the cumulative performance benchmarks for all affected periods were attained. Payments: If the Board's President & CEO determines that the State's EF reporting of WIOA activities contains inaccuracies or it is too onerous to generate suitable documentation for any WIOA payment claim, the President & CEO may waive the EF documentation requirement and direct that payment be paid. Upon mutual satisfaction by both the Board and the Contractor that either the respective system is "fixed," or an alternative system is available to produce accurate data, the Board may adjust the previously paid profit payments received by the Contractor. All performance payments will be collected by the final invoice submission.

**Performance Outcome Measures:** The Contractor may be eligible for contract renewal and considered successful, if the following measures are achieved:

- **Measurable Skills Gain**
  - 80% of OSY enrolled in a triggering education or training activity **should have at least one measurable skill gain per program year.**
- **WEX Expenditure Rate**
  - Contractor will expend at least **25% (\$191,500)** of the required portion of the budget on work-based learning to align with WIOA/CSCLM requirements

**Other Primary Indicators of Performance to be tracked and monitored to align with State baseline data.**

- **Employment/Education Retention Rate – 2<sup>nd</sup> Quarter After Exit**
  - **75%** of participants in education/training activities or unsubsidized employment during the 2nd quarter after exit from the program ~ **(performance indicator)**
- **Employment/Education Retention Rate – 4<sup>th</sup> Quarter After Exit**
  - **69%** of participants in education/training activities or unsubsidized employment during the 4th quarter after exit from the program ~ **(performance indicator)**
- **Credential Attainment Rate**
  - **83%** of participants attained an in-demand industry nationally recognized credential and/or secondary school diploma (or recognized equivalent) during participation and/ or within 1 year after exit from the program ~ **(performance indicator)**
- **Median Wages**
  - **\$2,800 Median Wage** of Participants who average at least \$2,800 during the 2<sup>nd</sup> Quarter after exit from the program ~ **(performance indicator)**

## **EXHIBIT V – Job Descriptions & Resumes**

**Following this page**

**Brittney Fish**  
6 Bahia Court Place  
Ocala, FL, 34472  
(352) 454-3821  
Fishbrittney@outlook.com

*Friendly, polite, motivated and ready to work for you.*

#### SKILLS AND ABILITIES

- Talented wordsmith
- Knowledge of construction building and principles
- Proficient in Microsoft
- Trained in statistical validity
- Diplomatic problem solver
- Strong communicator

#### EDUCATION

Florida State University, Tallahassee, FL  
Bachelor of Arts in Psychology, (04-2011)

Central Florida Community College, Ocala, FL  
Associate of Arts Psychology, (12-2008)

#### WORK EXPERIENCE

Eckerd Connects, Ocala, FL

**Workforce Career Coach, (02/2020-Present)**

- Counsel individuals to help them understand and overcome problems affecting their educational or vocational situations.
- Provide tutoring in Basic Skills proficiency.
- Maintain case management in multiple information systems.
- Instruct young adults through Penn Foster High School.
- Monitor federally funded YouthBuild grant.
- Assist in participant case file audits.
- *Certificate of completion in Department of Economic Opportunity Workforce Services Tier One Curriculum.*

Habitat for Humanity of Marion County, INC., Ocala, FL

**Volunteer Coordinator, (10/2012- 03/2020)**

- Coordinate over 3,000 volunteers annually
    - Habitat ReStore
    - Construction Site
    - Administration Office
  - Recruit and organize volunteers for HFHMC Strawberry Festival
    - Draws 20,000-40,000 people
    - 1,000+ volunteers Annually
  - Keep control over department and budget
  - Delegate tasks to volunteer groups
  - Educate and advocate for the HFH mission through public speaking
  - Manage partnership with Lowell C.I.'s Boot Camp program
  - *Certified in Volunteer Management through Habitat International*
- Construction Coordinator, (06/2014-Present)**
- Write construction purchase orders and invoices
  - Create construction scheduling and updates needed
  - Coordinate and invoice subcontracted work to MRMC
  - Price, pick-up and schedule materials needed

## Edward Deskovic

3695 SE 56th Ave, Ocala, FL 34480

Phone: (904) 400-4934

Email: Deskovice@yahoo.com

### Objective

Energetic self-starter and highly experienced classroom facilitator seeking an opportunity as a case manager to make positive impact in daily lives of individuals within my community.

### Ability Summary

Experience in scheduling, training, planning, directing, evaluating, and coordinating the operations of individuals within both public and private sector organizations.

### Education & Training

04/2022	<b>Eckerd Connects</b> <ul style="list-style-type: none"><li>- Tier 1 Certification</li><li>- NRF Customer Service Certification</li></ul>
01/2019 - Present	<b>College of Central Florida</b> <ul style="list-style-type: none"><li>- BAS – Business Administration*</li></ul> *15 credit hours needed for Healthcare Specialization Degree
01/2018 - 12/2018	<b>College of Central Florida</b> <ul style="list-style-type: none"><li>- Associate in Arts – Business Administration</li><li>- Microsoft Office Suite Professional Certification</li></ul>
08/1999 - 4/2001	<b>Florida State University</b> <ul style="list-style-type: none"><li>- Progress towards AA/AS</li></ul>

### Employment History

01/2022 - Current	<b>Career Coach</b> Eckerd Connects, Ocala, FL <ul style="list-style-type: none"><li>• Develop workforce, academic, and social skills of program participants</li><li>• Assist participants in customizing a path to employment</li><li>• Active and Follow-up case management</li></ul>
05/2019 - 12/2021	<b>Mobile Team Supervisor</b> Lifesouth Community Blood Ctr, Ocala, FL <ul style="list-style-type: none"><li>• Administer training and maintenance of personnel files for recruitment and phlebotomy team</li><li>• Motivate, Evaluate, and Coach daily performance of team members</li><li>• Administer annual performance evaluations</li><li>• Ensure adherence with SOP and AABB regulations</li><li>• Develop strategy for acquisition of new accounts</li><li>• Develop strategy to meet blood product demand of current accounts</li><li>• CDL Bloodmobile driver</li></ul>

06/2017 - 03/2019	<b>Co-owner</b> MJD Publishing LLC, Ocala, FL <ul style="list-style-type: none"> <li>• Accurately track business expenses using Microsoft Office Excel and QuickBooks</li> <li>• Quarterly tax filing and maintenance of company licensure and ownership of intellectual properties</li> <li>• Develop strategy for revenue generation including identifying new sole proprietor ventures, partnerships, and subcontractor relationships</li> </ul>
08/2016 - 06/2017	<b>General Manager (GM)</b> Advance Auto Parts, Summerfield, FL <ul style="list-style-type: none"> <li>• Supervise and schedule staff including full-time and part-time workers</li> <li>• Train, coach, and motivate team members</li> <li>• Develop strategy to meet quarterly financial targets</li> <li>• Grow customer satisfaction through implementation of strategic initiatives</li> </ul>
05/2015 - 08/2016	<b>Department Manager</b> Macy's, Ocala, FL <ul style="list-style-type: none"> <li>• Supervise and schedule staff including full-time and part-time workers</li> <li>• Train, coach, and motivate team members</li> <li>• Develop strategy to meet quarterly financial targets</li> <li>• Plan and evaluate execution of Customer Loyalty programs across Central Florida District.</li> </ul>
05/2004 - 05/2015	<b>General Manager (GM)</b> Starbucks, Ocala, FL <ul style="list-style-type: none"> <li>• Responsible for complete operation of multiple high-volume stores including staffing, training, inventory management, monthly sales goals, utilization of recognition programs</li> <li>• Peer mentor</li> <li>• Store manager trainer</li> <li>• Classroom facilitator</li> <li>• Supervise District during District Manager absence and vacations</li> <li>• Multi-unit management during periods of new manager selection and training</li> <li>• Project implementation specialist North Florida Region <ul style="list-style-type: none"> <li>- Drive-Thru Speed of Service Initiative</li> <li>- Drive-Thru Lean Process Auditor</li> </ul> </li> <li>• District Community Service Lead 2007-2010</li> </ul>



# Heaven Colón

8477 SW 103<sup>rd</sup> ST RD APT B ♦ Ocala, FL 34480 ♦ Cell: (352) 304-3000 ♦ [heavencolon@gmail.com](mailto:heavencolon@gmail.com)

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## Summary of Qualifications

Employment history consists of over 5+ years of providing quality customer service in different industries such as retail, office, and fast food. Current expertise includes promoting career development services; assist young adult job seekers aged 16-24 years old with individual employment plans, career exploration, employability training and occupational workshops. Proficient in database programs such as Employ Florida Marketplace, ATLAS, Empyra, Prove IT, and Microsoft programs: Outlook, Word, PowerPoint, and Excel.

## Key Skills

- Teamwork and safety oriented
- Compassionate and positive demeanor
- Highly motivated and strong work ethic
- Effective leadership and motivation tactics
- High degree of confidentiality and integrity

## Professional Employment

**Eckerd Connects Workforce Development-Ocala, FL** April 2016-Present

### Program Manager (November 2020-Present)

- ❖ Oversee tri-county area for Citrus Levy and Marion county WIOA youth program, manage and hire staff, assist with over all program quality and flow and manage all projects YouthBuild, WIOA Youth, Citrus PHX, and Paid Work Experience

### Site Manager May 2019-November 2020

- ❖ Assist with overseeing the case management of the YouthBuild project through monitoring and providing services for up to 48 participants who are interested in obtaining high school diploma, career development through occupational skills training, employment preparation and partner with Habitat for Humanity of Marion County to build homes for those in the community

### Lead Career Coach May 2014-May 2019

- ❖ Transitioned from Henkel's & McCoy over to Eckerd Youth Services while maintaining and managing a case load of 50 (+) active and follow up status youth ages 16-24 with various barriers ranging from high school drop outs to parenting youth to those who have never worked before all while providing quality workforce services including job searching, mentoring, occupational skills, work readiness training, and life/basic skills

**Henkel's & McCoy-Ocala, FL**

August 2013-April 2016

### Career Coach/Lead Career Coach August 2013-May 2014

- ❖ Maintained and managed a case load of 50 (+) active and follow up status youth ages 16-24 with various barriers ranging from high school drop outs to parenting youth to those who have never worked before all while providing quality workforce services

**Workforce Connection-Ocala, FL**

February 2013-August 2013

### Customer Service Representative

- ❖ Promoted Workforce Connection's resources such as Soft Skills, Overcoming Barriers and Resume workshops, suggest one-on-one appointments with placement specialist, and help guide customers through either Self Service services such as fax & printing

**Edible Arrangements-Ocala, FL**

November 2009-August 2011

### Customer Service Representative

- ❖ Implemented and updated weekly suggestive sales techniques to highlight featured items & promotional products while assisting customers purchasing needs on occasion products

## Education

Polk Community College

A.A. Business Administration & Management

Winter Haven, FL

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## KIMBERLY L. GREY

4056 N.E. 20<sup>th</sup> Ave Ocala, FL 34479 ■ 352-875-6997 ■ KimberlyLGrey@gmail.com

### Profile

Business professional with a versatile leadership skill set which includes financial budgeting, management, quality assurance, advanced computer skills including MS Office, case management and development of systems to increase quality productivity. Over 15 years of experience working with underserved youth and young adults and 9 years assisting with Workforce Development.

### Key Skills

Leadership/Supervision	Written Communication	Records Management
Certified Trainer	Computer Savvy	Organization
Data/Fiscal/Budget Management	Quality Control	Customer Service

### Experience

**ECKERD CONNECTS** (CareerSource Citrus, Levy, and Marion), Ocala, FL  
(Formerly known as Henkels & McCoy Training Services 2011-2016)

2011 to Present

#### *Program Manager, 2013 - Present*

- Data and Fiscal (resource) management: Track budget line items and process all invoice payments to young adults in the tri county area for YouthBuild, WIOA Youth Programs, Adult and Dislocated Worker Programs
- Quality Assurance checks with Department of Economic Opportunity Audit Tool
  - No Findings in the WIOA Youth Program State Audit since 2013
  - Best Practice Peer to Peer Auditing Reviewing
- Development of many paperless, database and fillable paperwork systems to assist staff with quicker processing to spend additional time with the young adults we serve
- Assist and Develop budgets for Workforce Innovation Opportunity Act (WIOA Funding), Adult and Dislocated and Youth Build Grant programs with the Fiscal Team (1.6 million federally funded allocations for staffing and participation costs per year)
- Oversee programs in Citrus, Levy and Marion County with add on program funding through the year including overseeing staff that manage adult and dislocated worker case loads and special projects
- Coordinate and Conduct Staff Meetings at minimum of 1 time per quarter.
- Identify and Schedule Professional Development Training for Program Staff
- Conduct Interviewing and New Hire Onboarding for 3 locations and supervise 11 - 15 Staff , Provide Employee Supervisions 1 time per month and yearly evaluations for all program staff
- Train and assist in Home Builders Institute Training, Serve Safe National Trainer, Customer Service Training to both Youth and Staff and Proctor Testing

#### *Phoenix Rising Program Manager, 2012 - 2013*

- Quality Assurance and Reviewing of case files in accordance to DEO Standards
- Financial approval of Supportive Service Funds and Purchase Orders for budget management
- Training and Coaching for Staff and Participants
- Coordinate Phoenix Rising Project Youth Build (Employment & Construction Training Program)
- Coordinate scheduling for the YouthBuild Grant with Community Partners with Match Funding

#### *Career Coach and Instructor (Phoenix Rising, DJJ and WIA), 2011 - 2012*

- Case management for Workforce Investment Act (WIA) Youth; including eligibility and compliance
- Coaching youth for career planning for Pre-Employment and Occupational Skills Training
- Data entry Employ Florida System and Efforts to Outcomes (ETO)System
- Electronic Filing into the Customers (ATLAS/Paperless) System

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**CLARISON PRODUCTS, INC. Ocala, FL**

**2009 to 2011**

***Quality Assurance Inspector***

- Initiate, prepare and coordinate data reports and hourly logs, Inspect for precision injection molded products for the Medical, Defense, and Aerospace corporations by using Micro-Vu Precision Vision System
- Receiving, processing and final inspections to ensure products match customers blueprint and inspection requirements

**ARNETTE HOUSE, INC., Ocala, FL**

**2002 to 2009**

***Residential Team Leader, 2007 - 2009***

- Manage operation of residential facility; supervision of 30 youth and 6 employees
- Case Management, follow State and DJJ requirements for Title IV Paperwork
- Quality Assurance for Case Records and Activities in accordance to DJJ and State Policy and Procedures
- Developed and Implemented Policy and Procedures in conjunction with Council on Accreditation (COA)

***Education and Recreation Coordinator, 2003 - 2007***

- Coordinated home-school program for 20 youth in conjunction with Marion County School Board
- Developed and implemented a Behavior Management Modification System : S.T.E.P. with C.H.A.R.M (Start Taking Extra Pride with Compassion, Honesty, Accountability, Respect and Motivation)
- Trained employees state mandated trainings; Water Safety, Emergency Management, CPR
- Planned and Scheduled all Educational and Recreational Activities for residential facility
- Managed all Emergency Preparation and Coordinated all Fire Drills and Emergency Mock Drills with the Emergency Management of Marion County Sheriff's Department
- Community Relations and Marketing for non-profit fundraisers

***Residential Direct Care Worker, 2002 - 2003***

- Provide direct supervision for youth ages 10 -17 in a 24 hr. residential facility including overnights
- Intakes for youth on Title IV paperwork for Department of Juvenile Justice and Department of Children and Families
- Maintain Confidential Documentation and Quality Assurance on case files
- Assisting in Medication Distribution and Maintained Accurate Logs and Documentation on Medication
- Crisis Intervention with residential clients

## **Education**

**University Of Phoenix, Phoenix, AZ**

**2010**

***Associates of Business Administration, GPA 3.89 Bachelors of Criminal Justice Administration, GPA 3.9***

- *Member of the University of Phoenix Eta Theta Chapter of Alpha Phi Sigma*
  - *Scholastically recognized by the University of Phoenix Eta Theta Chapter. (Highest national scholastic recognition for the Criminal Justice Field)*

**University Of Phoenix, Phoenix, AZ**

**2020**

***National Society of Leadership and Success***

- *Completion and Induction into the National Society of Leadership and Success training program with commitment to further personal development.*

## **Certifications**

**TABE Administrator**

**2011**

***TABE Administrator Certificate # 24289***

**OSHA Certified**

**2011**

***10 Hour General Industry Certification***

**Kimberly Grey | 2 of 2**

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Certified Workforce Professional	2011
<i>State of Florida Certified Workplace Professional 1</i>	
Solution Socials	2014
<i>Certified Efforts to Outcomes (ETO) Data Administrator</i>	
NRF Customer Service Proctor	2014
<i>Certified in training and testing with National Retail Federation Customer Service</i>	
Serve Safe Instructor/Trainer	2016/2019
<i>National Food Manager Training Certification</i>	
Home Builders Institute Instructor	2018
<i>HBI PACT Carpentry Instructor Certification</i>	
CASAS Administrator and Proctor	2020
<i>CASAS Proctor</i>	



## SHANNON MILLS

6225 N.E. 1<sup>st</sup> Street Ocala, FL 34470 • 352-433-7338 • [ShannonMills0831@gmail.com](mailto:ShannonMills0831@gmail.com)

### SUMMARY

Dedicated and technically skilled business professional with a versatile skill set with experience through case management and working with young adults. Skill set includes office skills, customer service, computer knowledge, records management, and case management. Self-Driven career coach accustomed to handling sensitive and confidential records. Proficient computer skills in MS Word, Excel, Outlook, Power Point, and Data Management Systems.

### WORK EXPERIENCE

#### **Eckerd Connects, Ocala, FL**

**2016-Current**

##### ***Lead Career Coach***

- Provide Case Management for 16-24 year old young adults
- Complete Recruitment efforts for participant development
- Complete assessment and eligibility for participants
- Develop skills to engage students in meeting program goals
- Complete Data and paperwork management
- Maintain case records detailing service needs and activities/arrangements
- Deliver skills training in work readiness, basic remedial skills in math and reading, and occupational training
- Provide training to new staff

#### **Henkels & McCoy, Ocala, FL**

**2014-2016**

##### ***Career Coach***

- Provide Case Management for 18-24 year old young adults
- Complete Recruitment efforts for participant development
- Complete assessment and eligibility for participants
- Develop skills to engage students in meeting program goals
- Complete Data and paperwork management
- Maintain case records detailing service needs and activities/arrangements
- Deliver skills training in work readiness, basic remedial skills in math and reading, and occupational training

#### **ARNETTE HOUSE, INC., Ocala, FL**

**2001-2014**

##### ***Shelter Care Manager***

**2010-2014**

- Responsible for management of Department of Children and Family client's care and treatment
- Primary manager to authorized shelter admissions
- Provide case management services that include assessment of problems, development of case plans to address needs identified, linking families to appropriate services, monitoring case plans for progress and advocating for youth and families
- Assist Shelter Program Manager with overseeing daily operations of emergency shelter

<b>CINS Case Manager</b>	<b>2006-2010</b>
<ul style="list-style-type: none"> <li>• Provided Case management Services. Services included but not limited to: coordinating and facilitating case staffing committee meetings, preparation of child in need of services petitions, judicial reviews</li> <li>• Provided Case Management Services that included an assessment of problems, development of service plans to address needs identified, linking families to appropriate services, monitoring the case plans for progress, and advocating for the youth and families involved</li> <li>• Collaborate and coordinated with Department of Juvenile Justice Attorney to prepare the child in need of services petitions, predispositions studies, and judicial reviews</li> </ul>	
<b>Intake Coordinator</b>	<b>2003-2006</b>
<ul style="list-style-type: none"> <li>• Conducted Centralized Intake Screening and determine most appropriate service that will meet the needs of youth and families</li> <li>• Meet with families to complete necessary paperwork to start the appropriate services with the agency</li> <li>• Provided case management services and follow-up support</li> <li>• Developed Service plans</li> </ul>	
<b>Residential Direct Care Worker</b>	<b>2001 – 2003</b>
<ul style="list-style-type: none"> <li>• Provide direct supervision for youth ages 10 -17 in a residential facility</li> </ul>	

## EDUCATION

<b>University of Phoenix, Phoenix, AZ</b> <i>Masters in Science in Administration of Justice and Security</i>	<b>2006-2008</b>
<b>Louisiana State University in Shreveport, LA</b> <i>Bachelors in Social Sciences-Sociology</i>	<b>1995-1999</b>
<b>Bossier Parish Community College, LA</b> <i>Associates in General Studies</i>	<b>1993-1995</b>

## CERTIFICATIONS

• Eckerd Connects Required Training Certifications	<b>2019</b>
• Florida Workforce Professional Certification	<b>2014</b>
• Test of Basic Adult Education (TABE) Certification	<b>2014</b>
• National Retail Federation (NRF) Customer Service Certification	<b>2014</b>

**Talia L Kong-Quee**  
**1047 Mossy Oak Drive**  
**Inverness, Florida 34450**

**PHONE 352-400-9911**  
**EMAIL: taliahill8@yahoo.com**

**Objective:** To obtain a position that will enable me to use my strong organizational skills, educational background and ability to work well with people.

### **SUMMARY OF QUALIFICATIONS**

- Qualified leader with proven ability to effectively supervise, implement change and to promote growth and morale among fellow colleagues and subordinates.
- Experienced in understanding and delivering services in accordance with CCARC policies, procedures and contractual standards.
- High initiative with strong self-management skills.
- Highly trustworthy, ethical and discreet.
- Able to coordinate multiple projects and meet deadlines under pressure.
- Organized, efficient and precise with strong communication skills.
- Proven ability to adapt quickly to challenges and changing environments.

### **RELEVANT SKILLS**

- Excellent interpersonal communication written and verbal skills.
- Developed leadership skills with experience in employee evaluation, performance, development and mentoring.
- Ability to develop and execute plan-of-action derived from contract.
- Capable of maintaining a high-volume schedule.
- PC proficiency in MS Office Word and Excel.

### **RELEVANT PROFESSIONAL EXPERIENCE**

**Eckerd Connects**  
**Workforce Retention Specialist**

**March 16, 2022-present**

- Develops and maintains a filing system; ensures files are organized, accurate, up-to-date, and clearly marked for easy access.
  - Ensures quality control by ensuring all documentation is scanned and accurate in the database and/or State Reporting System.
  - Conducts follow-up services by contacting participants and documenting current status on a monthly basis.
  - Conducts random file audits to ensure compliance with Federal, State and local requirements.
- Orders, inventories, and monitors supplies.

- Participate in required training and development activities as required.
- Monitor policies and procedures to ensure accuracy and compliance.
- Perform other duties as assigned.

**Citrus County Association of Retarded Citizens BKA Key Training Center  
2022**

**March 14, 2014-March 16,**

No. of clients on caseload: 8

**Employment Specialist**

- Coordinated the delivery of pre-service, in-service and on-the-job training for new and existing employees
- Present standard and routine training topics on an as needed basis
- Maintain schedule of training programs throughout the year
- Coordinate the delivery of training topics by identifying appropriate personnel to present material
- Generate training material and documentation for all training
- Ensured that attendees are properly scheduled to attend, and supervisor are notified
- Coordinated the scheduling of personnel when they needed to attend training programs
- Maintained accurate training records on all personnel
- Completed necessary information to ensure the facility's compliance requirements
- Maintained all training files for the facility
- Provide required documentation to the client, corporate and regional office on a weekly, monthly and annual basis
- Assist management in identifying facility training needs
- Develop an annual training plan
- Implement, monitor and verify Corporate Mentorship Program

**Citrus County Association of Retarded Citizens BKA Key Training Center**

**June 1, 2009-November 2013**

**Max. No. of clients: 6**

**Resident Manager**

Summary: Assumes responsibility for assisting developmentally delayed residents in life relationships, activities, care and development mental training while they are living in a special residential care setting.

- Completes documentation on and maintains records as required or directed (To include, but not limited to the following: community inclusion, formal and informal programs, medication information, transportation logs, daily logs, drills, etc.).
- Provides for physical care and supervision of residents appropriate to their functioning level.
- Administers, supervises and records medication of medical treatment to be given per physicians' orders. Follows mandated guidelines for storage, dispensing and recording.
- Promptly and properly attends to residents during seizures and assists in dealing with problematic behavior issues.
- Provides for the immediate bathing of any resident who voids or soils himself and ensures that the resident has a proper change of clothing.
- Assists in providing opportunities for residents to be involved in integrated community activities. Coordinates and assist, as necessary, with attendance at religious services.
- Provides or assists in transportation for residents to and from place of, employment, recreational and other events.



- Encourages positive social interactions and interpersonal relationships. Assists each resident in developing attitudes and behaviors appropriate to community living.
- Assists clients in handling money.
- Assists residents in making and keeping appointments when indicated.
- Takes residents shopping periodically and is accountable for same.
- Provides for and insures each residents right to privacy and advises residents of their rights.
- Protects each residents' rights and freedoms and maintains the confidentiality of personal information.
- Avoids the exploitation of any resident.
- Monitors clients and participates in routine household maintenance.
- Assists the clients as necessary in preparation of meals.
- Assists the Lead DSP by ensuring that residents participate appropriately in chores and that they have a suitable schedule.
- Participate in monthly fire and evacuation drills and all tornado and disaster drills with proper documentation of same.
- Assist the Lead DSP in maintaining a safe and hazard free environment (i.e. safe storage of and usage of all cleaning agents or, chemicals and use of instructions in Material Safety Data Sheets) and provides first aid as necessary.
- Reports immediately any reddened, bruised or broken skin areas on resident by filling out an unusual incident report. Also, reports all incidents or accidents regarding resident's condition to the in-charge person.

## **Professional Training**

- Medications Training
- Zero Tolerance Training
- Best Practices in Supportive Employment
- Marketing and Job Development
- Introduction to Social Security Work Incentive
- Behavioral Training
- Knowledge of life-safety and infection control protocols. Willingness to comply with in-service training or other mandates.
- T.A.C.T. and/or B.A.T. Certification and/or training (at the discretion of the Residential Services Supervisor).
- Ability to follow directions, handle emergency situations and act in accordance with good judgement.
- DEO Tier I -Workforce Professional State of Florida

**Victoria Wilson-Reich**

1572 W. Sweet Oaks Court

Lecanto, FL 34461

Phone: 352-201-7116 (Cell)

vwmz@hotmail.com

Dedicated individual seeks Career Coach Position where my multi-tasking, excellent customer service and organization skills can be used to facilitate growth in which ever company I may find myself employed.

**Skills and Qualifications**

- Excellent communications skills
- Detail orientated
- Able to learn quickly
- Previous experience with age group
- Analytical person
- Logical thinker
- Time Management skills
- Provide support to participants

**Employment History**

**Workforce Career Coach**

10/2020 – Current

**Eckerd Connects**

Lecanto, FL

- Promoted from Workforce Operations Assistant to Workforce Career Coach
- Provide orientations and information regarding the program
- Enroll qualified participants
- Ensure all paperwork is correct for enrollments, incentives, and closures
- Assist with other team member needs
- Liaison with CareerSource Citrus Levy Marion to provide inter-company benefits
- Provide training for Occupational Certificates
- Help qualified candidates find Paid Work Experience/Direct Hire opportunities
- Audit files as needed for local and state level
- Meet with community resources regarding referrals to and from the program

**Workforce Operations Assistant**

04/2016 – 09/2020

**Eckerd Connects**

Lecanto, FL

- Promoted from Administrative Assistant to Workforce Operations Assistant
- Lead for Citrus County Phoenix Rising Program PY 19/20
- Followed up with participants whose files have been closed
- See below

**Administrative Assistant**

08/2014 – 04/2016

**Henkels and McCoy**

Lecanto, FL

- Helped with all paperwork for the program
- Assisted Career Coaches with intake, documentation, program files and closures
- Dealt with inquiries from the public regarding the Youth Connections program
- Consulted with Career Source regarding appointments, and room bookings
- Provided answers for youth inquiries regarding aspects of the program

**Victoria Wilson-Reich**  
1572 W. Sweet Oaks Court  
Lecanto, FL 34461  
Phone: 352-201-7116 (Cell)  
vwmz@hotmail.com  
Page 2.

**Administrative Assistant**  
09/2013 – 8/2014

**XCEL HR**  
Lecanto, FL

- o Assisted with paperwork for the program
- o Helped with follow ups
- o Scanned paperwork into correct program

**Education and Training**

ServSafe Food Manager	ServSafe	01/2022
TBRI Caregiver Certificate	TBRI	06/2020
Tier 1 Workforce Professional	State of Florida	12/2014
Paraprofessional – Teacher Aide	ETS	06/2012
IC3 Internet and Computing Core Certificate	Certiport	06/2009
Medical Administrative Specialist	WTC	05/2009
High School Diploma	Withlacoochee Technical College	Inverness, FL

The first name in second chances.<sup>SM</sup>



## Workforce Development

### Job Description

<b>Title:</b>	Lead Career Coach	<b>Effective:</b>	July, 2017
<b>Job No:</b>	LDCARCOA	<b>Division:</b>	Workforce
<b>Supersedes:</b>	September, 2015	<b>Program/Dept:</b>	Operations
<b>Status:</b>	Non-Exempt	<b>Location:</b>	Multiple

#### I. Position Concept:

The Lead Career Coach provides support to 1-8 Career Coaches in the areas of Outreach/Recruitment, Assessment/Eligibility, work readiness skills and the development of basic remedial skills in math and reading to program and participants. Lead Career Coach will attend/conduct activities in the community relating to participant development. This person will provide support and assistance in meeting personal and team goals related to the program.

#### II. Essential Functions:

- Assist program Career Coaches in reaching goals established in Contract or Statement of Work.
- Outreach/Recruitment through attending/conducting activities in the community relating to participant development.
- Assessment/Eligibility of participants per project plan.
- Maintain case records detailing service needs and activities/arrangements for their fulfillment, according to data-management procedures established by program management and the funding sources.
- Deliver skills training in software applications, work readiness skills and the development of basic remedial skills in math and reading. Develop presentation and facilitation skills to engage students in meeting program goals.
- Deliver program curriculum/objectives in classroom/simulated workplace environment.
- Job Development by connect with employers and community organizations on a frequent basis to market and enrich the program and the success of the participants.
- Identify and recruit target population of clients and employers.
- Data and paperwork management.

#### III. Other Duties Include, But Not Limited To:

- Participate in training and development activities as required.



## Workforce Development

### Job Description

<b>Title:</b>	Lead Career Coach	<b>Effective:</b>	July, 2017
<b>Job No:</b>	LDCARCOA	<b>Division:</b>	Workforce
<b>Supersedes:</b>	September, 2015	<b>Program/Dept:</b>	Operations
<b>Status:</b>	Non-Exempt	<b>Location:</b>	Multiple

#### I. Position Concept:

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- Assist program Career Coaches in reaching goals established in Contract or Statement of Work.
- Outreach/Recruitment through attending/conducting activities in the community relating to participant development.
- Assessment/Eligibility of participants per project plan.
- Maintain case records detailing service needs and activities/arrangements for their fulfillment, according to data-management procedures established by program management and the funding sources.
- Deliver skills training in software applications, work readiness skills and the development of basic remedial skills in math and reading. Develop presentation and facilitation skills to engage students in meeting program goals.
- Deliver program curriculum/objectives in classroom/simulated workplace environment.
- Job Development by connect with employers and community organizations on a frequent basis to market and enrich the program and the success of the participants.
- Identify and recruit target population of clients and employers.
- Data and paperwork management.

#### III. Other Duties Include, But Not Limited To:

- Participate in training and development activities as required.

- Report any acts, incidents or conditions that reflect the possibility of inappropriate participant-to-participant or staff-to-participant relationships.
- Report any use of physical force and all unusual incidents per Eckerd policy and state guidelines.
- Perform other duties as assigned.

IV. Position in Organization:

A. Reports to:

B. Directly supervises:  
N/A

V. Relationships:

A. Internal:

Program and Eckerd staff

B. External:

Community Agencies  
Local School Officials  
Families  
Funder/Workforce Board

VI. Position Specifications:

- A. Education – Related Bachelor's degree, from an accredited College or University preferred.
- B. Experience – Past experience working with the targeted population. 4+ years relevant work experience.
- C. Skills – Demonstrated proficient in using Microsoft Office applications or online database tracking systems. Must have the ability to efficiently manage a large participant caseload (Active and Follow-up) in a fast pace environment. Must have the ability to work independent of central office or direct management support. Ability to maintain a leadership role with the students to motivate and influence positive behaviors. Excellent verbal and written communication skills. Knowledge and or experience with classroom management techniques.
- D. Physical Demands – The environment is an open office/classroom type facility that is reasonably clean and comfortable. The incumbent is in a non-confined setting in which he/she is free to move about. The position requires that the incumbent spend time writing, typing, speaking, listening, lifting (up to 25 pounds), carrying, seeing (such as close, color and peripheral vision, depth perception and adjusted focus), sitting, pulling, walking, standing, squatting, kneeling and reaching.
- E. Other – Must have appropriate and valid state driver's license and be able to meet requirements for Eckerd's Auto Insurance and be able to drive for business purposes. Must meet state criminal background check requirements.

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Date

I hereby acknowledge that I have read, understand, and accept the above job description as a condition for my employment.

Lead Career Coach



The first name in second chances.<sup>SM</sup>



### Job Description

<b>Title:</b>	Operations Director	<b>Effective:</b>	February, 2017
<b>Job No:</b>	March, 2010	<b>Division:</b>	Operations
<b>Supersedes:</b>	N/A	<b>Program:</b>	Multiple
<b>Status:</b>	Exempt	<b>Location:</b>	Multiple States

#### I. Position Concept:

The position provides direct operational supervision for all current and future Eckerd Kids Operations in the assigned region. This position ensures operational excellence across the 5 dimensions of leadership competence from the Eckerd Organizational Performance and Organizational Culture Wheels.

#### II. Essential Job Responsibilities:

- Coaches, mentors, and develops direct reports; ensuring region has the leadership capacity to forecast and respond to current and future business opportunities and challenges.
- Develops best practices for program policies and procedures within assigned region and is responsible for overseeing the implementation and training of those policies and procedures to all assigned program staff.
- Responsible for building and maintaining a culture within the region that aligns with Eckerd Kids values.
- Assist with funding proposals and grant writing to support program expansion and/or sustainability.
- Develop procedures to ensure that program outcome measures comply with statutorily mandated benchmarks.
- Establishes and monitors all program goals and objectives in accordance with agency standards, contract and grant compliance, and quality assurance standards.
- Regularly review costs, operations and forecast data to determine individual program progress in his or her assigned State(s).
- Maintains strong relationships with current stakeholders while identifying and establishing new relationships that enables the expansion of Eckerd Kids business.
- Report any acts, incidents or conditions that reflect liable situations.
- Perform other duties as assigned.

#### IV. Knowledge, Skills and Abilities:

- Advanced knowledge of federal laws and regulations that impact book of business.
- Advanced knowledge of contracts and contract language, coupled with experience monitoring performance against the requirements of the contract

- Must have strong program management skills including budgeting and cost estimating; proposal writing, contract management and business development activities.
- Excellent communication skills; written and verbal.
- Excellent diagnostic and problem solving skills.
- Exceptional organization skills and attention to detail are required and the candidate must be able to meet designated deadlines.
- Must demonstrate sensitivity to our service population's cultural and socioeconomic characteristics and needs.

V. Position in Organization:

- A. Reports to:  
Senior Operations Director
- B. Directly supervises:  
Assigned Program Director(s) in Region
- C. Indirectly supervises:  
N/A

VI. Relationships:

- A. Internal:  
Eckerd Operations and Support Center Staff
- B. External  
Government Officials  
Representatives of Regulatory Agencies  
Participants  
Members of the Media  
Current and Potential Contributors to the Organization  
The Public at Large  
Federal, state and local governmental agencies  
Industry groups and organizations

VII. Education & Experience:

- A. Education – Bachelor's degree, from an accredited College or University.
- B. Experience – Five years of direct workforce related experience. Prefer detailed understanding of both non-profit and for profit businesses. Operational program experience required.
- C. Skills – Demonstrated leadership, direction and management of all assigned programs including: overall financial management, customer service, business development and expansion, budget construction, contract negotiation, employee relations, program staffing, systems and resource allocation.
- D. Computer literate with basic word processing and database skills.

Operations Director



- E. Physical Demands - Requires sitting for approximately 2/3 of each day with periodic lifting of up to 25 pounds. Ability to communicate via telephone; Ability to travel regularly to accomplish goals. Must be free of communicable diseases as defined by state and to the extent that knowledge is attainable under the law as defined by the appropriate state and to the extent that knowledge is attainable under federal law.
- F. Other – Must meet state criminal background check requirements.
- G. Travel - Must be able to meet requirements for Eckerd's Auto Insurance and be able to drive for business purposes. Must have appropriate and valid state driver's license.



Supervisor

July 1, 2017

Date

I hereby acknowledge that I have read, understand, and accept the above job description as a condition for my employment.

Employee – Print and sign

Date

Operations Director

## **Jared Wilhelm**

3214 SE 24th Ter.  
Ocala, FL 34471  
(352) 857-3141  
jaredwilhelm2002@gmail.com

### **Summary**

Looking for a long term job with chances to advance, also helping people in some way.

### **Skills and Qualifications**

- Hard Working
- Motivated Team Player
- Personable
- Natural Leader
- Dedicated
- Eager to Learn

### **Education and Training**

<b>Penn Foster High School, Ocala, FL</b> <i>High School Diploma</i>	04/2022
<b>Certified Front Desk Representative Certification</b> <i>American Hotel and Lodging Institute</i>	05/2022
<b>Certified Restaurant Server Certification</b> <i>American Hotel and Lodging Institute</i>	05/2022
<b>Certified Guest Room Attendant Certification</b> <i>American Hotel and Lodging Institute</i>	05/2022
<b>Certified Maintenance Certification</b> <i>American Hotel and Lodging Institute</i>	05/2022
<b>Customer Service and Sales Certification</b> <i>National Retail Federation</i>	03/2022
<b>Certified Food Handler Certification</b> <i>Serve Safe</i>	02/2022
<b>College of Central Florida</b> <i>OSHA</i> <ul style="list-style-type: none"><li>• 10 Hour Construction Safety, Warehouse, and Forklift Certifications</li></ul>	02/2022

### **Work Experience**

<b>YouthBuild Phoenix Rising - Ocala, Florida</b> <ul style="list-style-type: none"><li>• Assisted with construction of a residential home in partnership with Habitat for Humanity.</li><li>• Constructed Walls, installed trusses, vinyl siding, roofing, etc.</li><li>• Followed supervisor instructions as to how to use certain tools or how to complete certain tasks</li></ul>	02/2022-Current
<b>Edible Arrangements - Ocala, Florida</b> <i>Kitchen Assistant (Food Preparation Workers)</i> <ul style="list-style-type: none"><li>• Kitchen Utensil Handling, Food Handling, Clean and prepare fruit</li></ul>	08/2018-06/2022

### Honors & Activities

Leadership and Recognition Award	03/2022
• Excellent Performance, Attendance, and Work Ethic	
Recognition Award	05/2022
• Excellent Performance, Attendance, and Work Ethic	
Community Ambassador Award	06/2022
• Possess the ability to effectively communicate and connect to the team. I helped my team understand and believe in the program.	



### Job Description

<b>Title:</b>	Program Manager	<b>Effective:</b>	July, 2017
<b>Job. No.:</b>		<b>Division:</b>	Operations
<b>Supersedes:</b>		<b>Program:</b>	Multiple
<b>Status:</b>	Exempt	<b>Location:</b>	Multiple

#### I. Position Concept:

The Program Manager is responsible for supporting and monitoring the delivery of high quality programs, in accordance with contract specifications, by supervising all aspects of program operations. This includes, but is not limited to: the management of site budgets; general program oversight, including daily project management and financial management and reporting functions; building partnerships to secure additional/sustaining funding including assisting with grant development; materials coordination, performance management, contract compliance, and resource allocation.

#### II. Essential Functions:

- Supervises and monitors all contracted activities/services at assigned sites to ensure model integrity and contractual compliance.
- Interview, hire, train, and directly supervise staff at assigned program. Responsible for conducting performance evaluations for assigned staff.
- Conduct new hire orientation, ensuring the new hire completes employment-related documents and benefits enrollment; also prepare or ensure preparation and submission of personnel transaction forms, evaluations, and similar documents, and obtain background screening information on new hires and candidates.
- Maintain program/department entry into data systems through accurate and timely input of referrals, client and/or staff demographics, billing, attendance, event, and assessment data.
- Locate and compile information and complete reports as required by contracting agencies; compile, sort, and verify accuracy of data; keep records of work completed; maintain follow-up system on reports requiring action on periodic basis.
- Maintain accurate and complete records according to Eckerd Kids standards and contractual obligations; client and staff record maintenance to include, but not limited to, filing, retrieval, retention, storage, updating, and destroying files as directed by policies and procedures; maintain confidentiality of client and staff records.
- Oversees the administration of surveys, pre/post assessments, and other evaluation tools as required for tracking outcome measures. Ensures accuracy and timeliness of data collection on internal and external electronic databases.
- Track program/department expenditures, ensuring purchasing orders or invoices and receipts are processed in timely manner; Report income and accruals as required, as assigned; Prepare invoices for program/department expenditures including leadership travel; maintain petty cash receipts; ensure p-card transactions are completed in accurate and timely fashion.

- Networks with community resources to promote program concept, coordinate fund raising efforts to support existing programs and for program expansion.
- Attend and actively participate in local Community Coalition meetings, Program Community Advisory Council meetings, pertinent funder meetings, local CBC meeting pertaining to overseen programs and other local related collaborations.
- Adhere to federal and state laws on confidentiality.
- Adhere to safe practices and ensure safe practice by clients in care.
- Prepare, maintain, and distribute program/department payroll time logs and timesheets; coordinate changes or corrections.
- As needed, ensure that all paperwork related to staff injuries and/or incidents is completed and submitted in timely fashion.
- Serve as member of program/department leadership, quality, treatment, and advisory teams; attend meetings and prepare meeting minutes.

III. Location Specific Essential Functions: (Those functions that are unique to the location in which the employee serves)

- Ensure that all programs are on track to meet or exceed contractual performance goals within the guidelines of the operating budget and program deliverables.
- Staff Training & Development a minimum of one training session per quarter with documented evidence of 80% staff attendance.
- Conduct business development activities and assist the Regional Manager in responding to RFP's, grant opportunities, in an effort to grow business in the Region.
- Community outreach service agencies to assist where necessary to fulfill delivery of contract compliance.

IV. Other Duties Include, But Not Limited To:

- Participate in training and development activities as required.
- Report any acts, incidents or conditions that reflect the possibility of inappropriate youth-to-youth or staff-to-youth relationships.
- Report any use of physical force and all unusual incidents per Eckerd Kids policy and state guidelines.
- Perform other duties as assigned.

V. Position in Organization

A. Reports To:  
Area Manager

B. Directly Supervises:

Program Manager

Program staff as assigned.

VI. Relationships:

- A. Internal:
  - Eckerd Program and Support Center Staff
- B. External:
  - Program youth and families
  - School District staff, administration, faculties
  - Local Department of Children & Families staff
  - Local Community-Based Care (CBC) agency staff
  - CBC contracted case management agency staff
  - Program Advisory Committee
  - County and City Parks & Recreation personnel
  - Community Organizations
  - Programs' funders and stakeholders

VII. Position Specifications:

- A. Education - Bachelor's Degree, from an accredited College or University, in human services (e.g., psychology, social work, sociology or related field) or higher education required. (If providing therapeutic supervised visitation services or providing clinical supervision to unlicensed staff must be a Master's level licensed clinician).
- B. Experience - Three years full-time experience working with youth and families required.
- C. Skills – Supervision, communication (verbal, written, listening) organizational (prioritizing tasks, maintaining case notes), data collection. Must be proficient in specific technology or systems that are utilized to track or manage day to day activities as assigned.
- D. Physical Demands - Must be able to lift a minimum of 30 pounds. Regular sitting, working at computer keyboard and desk, standing to file or retrieve documents in filing cabinet.
- E. Other - Must meet state and Eckerd Kids criminal background check requirements.
- F. Travel - Must be able to meet requirements for Eckerd Kids Auto Insurance and be able to drive for business purposes. Must have appropriate and valid state driver's license.

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Date

I hereby acknowledge that I have read, understand, and accept the above job description as a condition for my employment.

Program Manager



### Job Description

<b>Title:</b>	Site Manager	<b>Effective:</b>	July, 2017
<b>Job No:</b>	SITEMNGR	<b>Division:</b>	Workforce
<b>Supersedes:</b>	December, 2015	<b>Program/Dept:</b>	Operations
<b>Status:</b>	Exempt	<b>Location:</b>	Multiple

#### I. Position Concept:

The Site Manager is responsible for supporting and monitoring the delivery of high quality program in accordance with contract specifications and performance outcomes. This includes the management of site budget; tracking project Key Performance Indicators (KPI), project management and reporting functions; training materials coordination and resource allocation.

#### II. Essential Functions:

- Oversees classroom activities ensuring staff adheres to the prescribed lesson plans and there is an environment conducive to the learning experience all participants.
- Utilize training and instructional methods that reinforce learning by using past experience and best practices from their professional experience to enhance the learning experience.
- Responsible for employee relations, effective communications, staff meetings, coaching sessions and professional growth at the program site.
- Coordinates training site selection, resolves transportation issues; recruits eligible participants conduct parent orientation and coordinate with various local and state agencies).
- Plans and coordinates special project based events such as graduation and community service events; develops worksites, plans and schedules field trips and guest speakers;.
- Develops program improvement initiatives.
- Ensures accurate participant records are maintained. This includes assessments, case management sessions and case notes, and other documents related to the KPI area of the contract.

#### III. Other Duties Include, But Not Limited To:

- Participate in training as required.
- Ensure adherence to Eckerd's Policy and Procedure Manual. Report any acts, incidents, or conditions that reflect the possibility of inappropriate staff-to-participant/family relationships.
- Report any use of physical force and all unusual incidents per Eckerd policy and state guidelines.
- Perform other duties as assigned or needed.

#### VI. Position Specifications:

- A. Education – Bachelor's degree from an accredited College or University
- B. Two years of work experience in business or educational field. Past experience in management and working with targeted population. Skills - Exceptional oral, written and interpersonal communication skills with the ability to apply common sense to carry out instructions and instruct others, interpret documents, understand procedures, write reports and correspondence,. Analytical ability is required to gather and summarize data for reports. Possess the ability to handle sensitive and confidential situations and continually demonstrate poise, tact and diplomacy. Must possess excellent organization and time management skills and the ability to provide leadership, supervision and training using positive supervisory techniques Proficiency in Microsoft Office.

- C. Physical Demands - In the course of performing this position, you spend time writing, typing, speaking, listening, lifting (up to 25 pounds), carrying.
- D. Must meet criminal background check requirements. Must successfully pass an FBI criminal background check. Must be able to meet requirements for Eckerd's Auto Insurance and be able to drive for business purposes. Must have and maintain an appropriate and valid state driver's license, and a vehicle with appropriate insurance coverage if required to drive in the course of performing assigned duties and responsibilities.

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Date

I hereby acknowledge that I have read, understand, and accept the above job description as a condition for my employment.

\_\_\_\_\_  
Employee – Print and sign

\_\_\_\_\_  
Date





### Job Description

<b>Title:</b>	Success Mentor	<b>Effective:</b>	July, 2017
<b>Job No:</b>	STSUMENT	<b>Division:</b>	Workforce
<b>Supersedes:</b>	June, 2016	<b>Program/Dept:</b>	Operations
<b>Status:</b>	Non- Exempt	<b>Location:</b>	Multiple

#### I. Position Concept:

The Success Mentor is responsible for the coordination and delivery of mentoring services for youth and coordinates with the community to increase awareness of need for mentors and builds a mentor database to refer students. The position will provide accurate reporting to management and funding source. He/she supports and monitors the delivery of a quality and effective mentoring consistent with the terms and conditions of the contract.

#### II. Essential Functions:

- Builds a working relationship with the youth and fosters the development of positive life skills based on trust, while providing an environment conducive to the learning experience.
- Supervises participants and assess participants skill levels in order to assist them with reaching their full potential and achieving educational goals by utilizing Eckerd methodologies.
- Assist in administering orientation sessions and providing participants with the necessary program information.
- Attend training on counseling techniques in order to further assist the participant population.
- Utilizes effective mentoring and leadership skills.
- Assist, advise and counsel a diverse student population with regard to program policies and standards while demonstrating sensitivity to student needs and circumstances Performs routine follow-up with participants as it relates to personal and educational goals.
- Responsible for adhering to the prescribed, authorized Individual Employment Plan or student success plan. Works in conjunction with the Education Team to create effective training goals, lesson plans, and fidelity tools to ensure effective implementation of Eckerd curriculums
- Motivates students to actively participate in all aspects of the change process, using Motivational Interviewing and other empirically based techniques to guide the participants towards lasting change.
- Reviews, analyzes and reports participant records including assessments, assignments, tests, reports, performing data entry and other program related information as required.
- Works with staff to create a mentoring referral database for Eckerd participants and works with community partners to build a mentoring program and create linkages between participant need and mentor assigned/referred.

- Provides support for students in preparations for training and credentialing.
- Monitor young adults to ensure safety at all times while at the construction site and lead daily safety meetings to promote working safely.
- Assist with recruitment efforts to include leading portions of the mental toughness recruitment phase in preparing youth for program enrollment
- Teach interpersonal skills, problem-solving skills, and other soft skills needed for future employment while working with the participants.

### III. Other Duties Include, But Not Limited To:

- Participate in training and development activities as required.
- Report any acts, incidents or conditions that reflect the possibility of inappropriate participant to participant or staff-to-participant relationships.
- Report any use of physical force and all unusual incidents per ECKERD policy and state guidelines.
- Perform other duties as assigned.

### IV. Relationships:

- A. Internal:  
SM will interact with Program manager,  
Staff and participants to deliver comprehensive mentoring services,
- B. External:  
Variety of community resources  
Public and private agencies,  
Vendors  
Workforce partners  
Mentoring groups

### V. Position Specifications:

- A. Education – High School diploma required.
- B. Experience – Two years working experience working with targeted population of young adults required. Five years of related construction experience preferred.
- C. Skills – Willingness to share skills, knowledge, and expertise. Demonstrates a positive attitude and acts as a positive role model analytical, excellent verbal and written communication, self-motivation, collaborative, resourceful, flexible, creative, objective, interpersonal skills initiative, problem solving, decision making, organization, planning and critical judgment skills. Basic skills instruction, development and use of learning and media centers, Ability to learn and utilize various instructional technology software programs and equipment.
- D. Physical Demands – Requires extended periods of walking/sitting/standing; Depending on the assigned program/facility, position may also occasionally expose incumbent to working outdoors for extended periods of time, and exposure to the elements; Incumbent may occasionally lift/move up to 25 pounds.

Mentor

Success

- E. Other – Must meet state criminal background check requirements, must possess ability to pass a drug test. Must be able to meet requirements for Eckerd's Auto Insurance and be able to drive for business purposes. Must have and maintain an appropriate and valid state driver's license. Travel is 20%.
- F. Travel - Must be able to meet requirements for Eckerd's Auto Insurance and be able to drive for business purposes.

**Program Location Specific:**

This position will be based primarily on a construction site with occasional training in a classroom setting.

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Date

I hereby acknowledge that I have read, understand, and accept the above job description as a condition for my employment.

\_\_\_\_\_  
Employee – Print and sign

\_\_\_\_\_  
Date

Mentor

Success



Job Description			
<b>Job Code:</b>	01200003	<b>Job Title:</b>	VP, Operations
<b>Pay Grade:</b>	25	<b>EEO:</b>	
<b>Status:</b>	Exempt	<b>Division:</b>	All
<b>Program/Dept(s):</b>	Operations	<b>Location(s):</b>	Multiple
<b>Reports to:</b>	Chief of Programs & Strategy	<b>Supervises:</b>	Operations Director(s) and Program Manager(s)
		• <b>Directly</b>	All assigned operations supervisors and staff
		• <b>Indirectly</b>	
<b>Relationships (Internal):</b>	All levels of employees within the organization	<b>Relationships (External):</b>	Board of Directors; Government Officials; Representatives of Regulatory Agencies; Clients and Family members; Members of the Media; Current and Potential Contributors to the Organization; The Public at Large; Federal, state and local governmental agencies; Industry groups and organizations
<b>Effective:</b>	July, 2017	<b>Supersedes:</b>	July, 2007

#### **I. Position Concept:**

The position assists in developing and implementing the strategic business plan and direction for the assigned operations areas of the organization. Supports and implements the vision, policies, and goals established by the CEO and the Board of Directors. This position ensures operational excellence across the 5 dimensions of leadership competence from the Eckerd Organizational Performance and Organizational Culture Wheels.

#### **II. Essential Job Responsibilities:**

- Provides strategic direction to all assigned operations activities that are aligned with the Eckerd Connects Strategic and Annual Operating Plans.
- Creates a strong, positive organizational culture in assigned operational areas with an emphasis on leadership development, capacity-building, and succession planning. Develops and executes procedures and controls to promote communication and effective information flow within the organization.
- Establishes and implements operating policies consistent with the organization's broad policies and objectives and ensures their execution.
- Implements safe, innovative programs that meet corporate goals and objectives.
- Creates the structure and processes necessary to manage the organization's current activities and its projected growth.
- In collaboration with Chief of Programs & Strategy as well as contracting agencies, establish meaningful /achievable performance measures and ensure that performance meets expectations. Ensure that all programs are rated as acceptable or better based on the applicable contract and licensing standards.
- Defines outcomes and measures of success. Ensures that regular and systematic evaluations are conducted against these measures.
- Ensures that the responsibilities, authorities, and accountability of all staff members are clearly defined, understood, and implemented effectively.
- Ensures that all organization activities and operations in assigned areas are carried out in compliance with local, state, and federal regulations and laws governing business operations.
- Maintains strong relationships with current stakeholders while identifying and establishing new relationships that enable the expansion of Eckerd Connects business.
- Continually research and analyze market trends and funding streams to ensure the long-term viability of Eckerd programming and promote the development of new innovation.

Vice President, Operations

**III. Nonessential Job Duties:**

- Perform other duties as assigned.

**IV. Position Specifications:**

**Education:** Bachelor's degree, from an accredited College or University, required. A related field Master's strongly preferred.

**Experience:** Minimum of ten years of related work experience at the corporate level. Prefer detailed understanding of both non-profit and for-profit businesses. Operational program experience preferred.

**Skills:** Demonstrated strong customer-focus, marketing skill, and ability to exercise independent judgment. Must be self-motivated and organized, and have excellent people skills, strong presentation and persuasion skills, and verbal and written communication skills; Drive for results; Ability to negotiate and influence decision makers; Computer literate with basic word processing and database skills.

**Physical Demands:** Requires sitting for approximately 2/3 of each day with periodic lifting of up to 25 pounds. Ability to communicate via telephone; Ability to travel regularly to accomplish goals. Must be free of communicable diseases as defined by state and to the extent that knowledge is attainable under the law as defined by the appropriate state and to the extent that knowledge is attainable under federal law.

**Other:** Must meet state criminal background check requirements.

**Travel:** Must be able to meet requirements for Eckerd's Auto Insurance and be able to drive for business purposes. Must have and maintain an appropriate and valid state driver's license.

---

*Supervisor*

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*Date*

I hereby acknowledge that I have read, understand, and accept the above job description as a condition for my employment.

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*Employee – Print and sign*

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*Date*

Vice President, Operations



## Workforce Development

### Job Description

<b>Title:</b>	Workforce Career Coach	<b>Effective:</b>	July, 2017
<b>Job No:</b>	CARCOACH	<b>Division:</b>	Workforce
<b>Supersedes:</b>	September, 2015	<b>Program/Dept:</b>	Operations
<b>Status:</b>	Non-Exempt	<b>Location:</b>	Multiple

#### I. Position Concept:

The Career Coach is the primary point of contact with the participants and others in the participant's circle of influence. The Career Coach will recruit for the program as well as seek employment and educational opportunities as participants complete the program. The Career Coach must display initiative, exercise judgment and make decisions that are consistent with program goals.

#### II. Essential Functions:

- Outreach/Recruitment through attending/conducting activities in the community relating to participant development.
- Assessment/Eligibility of participants per project plan.
- Maintain case records detailing service needs and activities/arrangements for their fulfillment, according to data-management procedures established by program management and the funding sources.
- Deliver skills training in software applications, work readiness skills and the development of basic remedial skills in math and reading. Develop presentation and facilitation skills to engage students in meeting program goals.
- Deliver program curriculum/objectives in classroom/simulated workplace environment.
- Job Development by connect with employers and community organizations on a frequent basis to market and enrich the program and the success of the participants.
- Identify and recruit target population of clients and employers.
- Data and paperwork management.

#### III. Other Duties Include, But Not Limited To:

- Participate in training and development activities as required.
- Report any acts, incidents or conditions that reflect the possibility of inappropriate participant-to-participant or staff-to-participant relationships.



## Workforce Development

### Job Description

<b>Title:</b>	Workforce Career Coach	<b>Effective:</b>	July, 2017
<b>Job No:</b>	CARCOACH	<b>Division:</b>	Workforce
<b>Supersedes:</b>	September, 2015	<b>Program/Dept:</b>	Operations
<b>Status:</b>	Non-Exempt	<b>Location:</b>	Multiple

#### I. Position Concept:

The Career Coach is the primary point of contact with the participants and others in the participant's circle of influence. The Career Coach will recruit for the program as well as seek employment and educational opportunities as participants complete the program. The Career Coach must display initiative, exercise judgment and make decisions that are consistent with program goals.

#### II. Essential Functions:

- Outreach/Recruitment through attending/conducting activities in the community relating to participant development.
- Assessment/Eligibility of participants per project plan.
- Maintain case records detailing service needs and activities/arrangements for their fulfillment, according to data-management procedures established by program management and the funding sources.
- Deliver skills training in software applications, work readiness skills and the development of basic remedial skills in math and reading. Develop presentation and facilitation skills to engage students in meeting program goals.
- Deliver program curriculum/objectives in classroom/simulated workplace environment.
- Job Development by connect with employers and community organizations on a frequent basis to market and enrich the program and the success of the participants.
- Identify and recruit target population of clients and employers.
- Data and paperwork management.

#### III. Other Duties Include, But Not Limited To:

- Participate in training and development activities as required.
- Report any acts, incidents or conditions that reflect the possibility of inappropriate participant-to-participant or staff-to-participant relationships.



- Report any use of physical force and all unusual incidents per Eckerd Kids policy and state guidelines.
- Perform other duties as assigned.

V. Relationships:

A. Internal:

Program and Eckerd staff

B. External:

Community Agencies  
Local School Officials  
Families  
Funder/Workforce boards

VI. Position Specifications:

- Education- Related Bachelor's degree, from an accredited College or University preferred.
- Experience- Past experience working with the targeted population. 3+ years relevant work experience.
- Skills –Demonstrated proficient in using Microsoft Office applications or online database tracking systems. Must have the ability to efficiently manage a large participant caseload (Active and Follow-up) in a fast pace environment. Must have the ability to work independent of central office or direct management support. Ability to maintain a leadership role with the students to motivate and influence positive behaviors. Excellent verbal and written communication skills. Knowledge and or experience with classroom management techniques.
- Physical Demands – The environment is an open office/classroom type facility that is reasonably clean and comfortable. The incumbent is in a non-confined setting in which he/she is free to move about. The position requires that the incumbent spend time writing, typing, speaking, listening, lifting (up to 25 pounds), carrying, seeing (such as close, color and peripheral vision, depth perception and adjusted focus), sitting, pulling, walking, standing, squatting, kneeling and reaching.
- Other – Must have appropriate and valid state driver's license and be able to meet requirements for Eckerd's Auto Insurance and be able to drive for business purposes. Must meet state criminal background check requirements.
- Travel – Must be able to meet requirements for Eckerd's Auto Insurance and be able to drive for business purposes.

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Date

I hereby acknowledge that I have read, understand, and accept the above job description as a condition for my employment.

\_\_\_\_\_  
Employee – Print and sign

\_\_\_\_\_  
Date





### Job Description

<b>Title:</b>	Workforce Development Specialist	<b>Effective:</b>	July, 2017
<b>Job No:</b>	WORKDVSP	<b>Division:</b>	Workforce
<b>Supersedes:</b>	September, 2015	<b>Program/Dept:</b>	Operations
<b>Status:</b>	Non-Exempt	<b>Location:</b>	Multiple

#### I. Position Concept:

The Workforce Development Specialist is the primary point of contact between our staff, participants and potential employers. The WDS will build a network of business relationships that support subsidized and unsubsidized employment opportunities for participants.

#### II. Essential Functions:

- Attend/conduct activities in the community relating to employment services and connect with employers and community organizations on a frequent basis to market and enrich the program and the success of the participants.
- Maintains regular contact with employers to monitor employment satisfaction and to suggest refinement of requirements to better prepare participants and meet employer hiring needs.
- Works with participants to develop assigned subsidized placement, accurately completes Worksite Agreements, clearly reviews policies and process with participant and employer.
- Assists in the development and documents job duties, and follows up with employer/participant surveys regularly to ensure program satisfaction and success.
- Develop and/or strengthen relationships with local employers, colleges, military, and social service agencies leading to fulfillment of contractual objectives.
- Enter data collected on client and employer activity in an internal and/or state system. Maintain accurate participant records, performs filing and general clerical functions. Tracks and reports on placement activities. Works with staff to identify job placement concerns and propose solutions.
- Program marketing, minimum one event/quarter (Specialized Recruitments, job fair).
- Understands of Labor Market Information, Demand Occupations, and watch for trends in employment.

#### III. Other Duties Include, But Not Limited To:

- Report any acts, incidents or conditions that reflect the possibility of inappropriate youth-to-youth or staff-to-youth relationships.
- Report any use of physical force and all unusual incidents per Eckerd policy and state guidelines.
- Perform other duties as assigned.

V. Relationships:

A. Internal:

All staff

B. External:

Workforce partners

Vocational Institutions

Professional organizations

Youth and Community Centers

VI. Position Specifications:

- Education – Related Bachelor's Degree from an accredited College or University preferred.
- Experience – 2+ years relevant work experience hiring, training, and managing staff. Past experience working with the targeted population.
- Skills –Excellent people skills and ability to build relationships. Ability to work effectively with a diverse group of participants, staff, and community. Basic knowledge and understanding of issues that affect people with barriers and disabilities. Strong process orientation: Detail oriented, logical, and methodological approach to problem solving. Ability to read, analyze and interpret general business periodicals, professional journals, and technical procedures. Ability to deal with complex problems involving multiple facets and variables in non-standardized situations.
- Physical Demands – The environment is an open office/classroom type facility that is reasonably clean and comfortable. The incumbent is in a non-confined setting in which he/she is free to move about. The position requires that the incumbent spend time writing, typing, speaking, listening, lifting (up to 25 pounds), carrying, seeing (such as close, color and peripheral vision, depth perception and adjusted focus), sitting, pulling, walking, standing, squatting, kneeling and reaching.
- Other - Must have appropriate and valid state driver's license and be able to meet requirements for Eckerd's Auto Insurance and be able to drive for business purposes. Must meet state criminal background check requirements. Travel up to 40% of the time.
- Travel - Must be able to meet requirements for Eckerd's Auto Insurance and be able to drive for business purposes.



### Job Description

<b>Job Code:</b>	02000145	<b>Job Title:</b>	Workforce Retention Specialist
<b>Pay Grade:</b>	14	<b>EEO:</b>	2 W/C: 8868
<b>Status:</b>	Non-Exempt	<b>Division:</b>	Workforce Development
<b>Program/Dept(s):</b>	Workforce Programs	<b>Location(s):</b>	Multiple
<b>Relationships (Internal):</b>	All staff	<b>Relationships (External):</b>	Workforce partners; Vocational Institutions; Professional organizations; Youth and Community Centers
<b>Effective:</b>	July, 2017	<b>Supersedes:</b>	N/A

#### **I. Position Concept**

The Retention Specialist provides ongoing support and guidance to participants prior to and after program completion. The RS establishes and maintains employer, educational and community relationships.

#### **II. Essential Functions**

- Provides individualized support and coaching to clients to ensure post program placement retention. This may include assisting clients in navigating employment separations and finding a new job.
- Check with supported employee and employer at regular intervals, identify solutions to workplace concerns, and facilitate coaching to assist both parties.
- Monitor client progress and examine areas where additional support is needed.
- Work with post-secondary and other academic institutions to assist students in navigating college or trade school systems and resources successfully.
- Develop and/or strengthen relationships with local employers, colleges, military, and social service agencies leading to fulfillment of contractual objectives.
- Enter data collected on client and employer activity in an internal and/or state system. Maintain accurate participant records, performs filing and general clerical functions. Tracks and reports on placement activities.
- Responsible for documenting activities, progress and outcomes of clients.
- Works with staff to identify job placement concerns and propose solutions.
- Organize and run workshops for our clients regarding employability and career pathways.
- Understanding of Labor Market Information, Demand Occupations, and watch for trends in employment.

#### **III. Other Duties Include, But Not Limited To**

- Report any acts, incidents or conditions that reflect the possibility of inappropriate participant-to-participant or staff-to-participant relationships.
- Report any use of physical force and all unusual incidents per Eckerd policy and state guidelines.
- Perform other duties as assigned.

#### **IV. Position Specifications**

**Education:** Bachelor's Degree from an accredited College or University preferred.

**Experience:** 2+ years relevant work experience hiring, training, and past experience working with the targeted population.

**Skills:** Excellent people skills and ability to build relationships. Ability to work effectively with a diverse group of participants, staff, and community. Basic knowledge and understanding of issues that affect people with barriers and

\_\_\_\_initials

1 of 2

disabilities. Strong process orientation: Detail oriented, logical, and methodological approach to problem solving. Ability to read, analyze and interpret general business periodicals, professional journals, and technical procedures. Ability to deal with complex problems involving multiple facets and variables in non-standardized situations.

*Other:* Must have appropriate and valid state driver's license and be able to meet requirements for Eckerd's Auto Insurance and be able to drive for business purposes. Must meet state criminal background check requirements. Travel up to 40% of the time.

*Travel:* Must be able to meet requirements for Eckerd's Auto Insurance and be able to drive for business purposes.

*Physical Demands:* The environment is an open office/classroom type facility that is reasonably clean and comfortable. The incumbent is in a non-confined setting in which he/she is free to move about. The position requires that the incumbent spend time writing, typing, speaking, listening, lifting (up to 25 pounds), carrying, seeing (such as close, color and peripheral vision, depth perception and adjusted focus), sitting, pulling, walking, standing, squatting, kneeling and reaching.

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*Supervisor*

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*Date*

I hereby acknowledge that I have read, understand, and accept the above job description as a condition for my employment.

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*Employee – Print and sign*

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*Date*

\_\_\_\_initials

Workforce Retention Specialist

2 of 2

## EXHIBIT VI – Salary Structure

### Eckerd Connects Staff Job Titles and Salary Hourly Ranges (updated for PY22, 7-1-2023- 6-30-2024)

							Range Rates			Auto Ins Position s
Code	Description-English (US)	Paygrade	FLS A	W/C	Job Class	EE O	Minimum	Midpoint	Maximum	
1300003	Area Manager	S10018	E	881 0	MG	1	\$48,717.90	\$60,897.90	\$73,077.90	
2000015	Billing Analyst	H20015	N	881 0	PR	2	\$16.93	\$21.16	\$25.39	
5000017	Data Integrity Specialist	H20017	N	881 0	CL	5	\$21.09	\$26.37	\$31.65	
2000044	Educational Instructor	H20014	N	886 8	PR	2	\$15.39	\$19.24	\$23.09	No
2000060	GED Instructor, WFD	H20014	N	886 8	PR	2	\$15.39	\$19.24	\$23.09	No
2000073	Lead Career Coach	H20016	N	886 8	PR	2	\$18.80	\$23.49	\$28.19	
1300028	Operations Director	S10021	E	881 0	MG	1	\$66,641.40	\$83,301.75	\$99,962.10	Yes
2300033	Program Manager	S10017	E	881 0	MG	2	\$43,882.65	\$54,853.05	\$65,823.45	Yes
02300045	Site Manager	S10016	E	881 0	PR	2	\$39,087.30	\$48,859.65	\$58,632.00	
2000131	Success Mentor	H20010	N	886 8	PR	2	\$10.97	\$13.72	\$16.46	
1200003	VP, Operations	S10025	E	881 0	MG	1	\$112,294.75	\$140,368.15	\$168,441.55	
2000142	Workforce Career Coach	H20015	N	886 8	PR	2	\$16.93	\$21.16	\$25.39	
2000143	Workforce Development Specialist	H20015	N	886 8	PR	2	\$16.93	\$21.16	\$25.39	No
2000159	Workforce Program Director	S10018	E	881 0	PR	2	\$48,717.90	\$60,897.90	\$73,077.90	No
2000145	Workforce Retention Specialist	H20014	N	886 8	PR	2	\$15.39	\$19.24	\$23.09	No
05000049	Workforce Operations Assistant	H20013	N	881 0	CL	5	\$14.11	\$17.64	\$21.17	No
02000144	Workforce Instructor	H20013	N	886 8	PR	2	\$15.39	\$19.24	\$23.09	No

## EXHIBIT VII – RFP Page Noting Option to Renew

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

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

### DESCRIPTION OF CSCLM ONE STOP SYSTEM:

CSCLM delivers all programs and services to customers through its One Stop System. This system is developed around both a “physical front door” and through “electronic access.” The system includes connectivity between the various partners and service providers. The goal of the One Stop System is to provide full-service, staffed sites, offering services which assist individuals in obtaining employment through an individualized mix of career services and training-related activities. This ITN is focused on services and programs for Workforce Innovation and Opportunity Act (WIOA) eligible youth.

Responses may be submitted by a single entity or by a group of organizations or agencies that have agreed to work cooperatively to deliver services and achieve desired outcomes. If Responses are submitted by a group, a single lead entity must be designated for contracting purposes.

CSCLM reserves the right to select none of the Responses made to this ITN. Nothing obligates CSCLM to pay the cost of Response preparation and submission. Final contract approval with the selected organization(s) for WIOA Youth Services will be subject to negotiation. The contract will be awarded for a period of 4 years with renewal done each year.

Questions regarding the ITN should be directed to: [cgalica@careersourceclm.com](mailto:cgalica@careersourceclm.com). All questions must be submitted in writing to this e-mail address. All questions will then be answered and forwarded to all qualified parties as part of the process. **No questions will be addressed individually.**

## EXHIBIT VIII – Report of Additional Funding/Expenditures Form

(Example of Form)

TO: CareerSource Citrus Levy Marion

<b>CAREERSOURCE CONTRACT AGREEMENT NUMBER</b>		
<b>GRANTEE OF ADDITIONAL FUNDING (Name/Address):</b>		
<b>ADDITIONAL FUNDING APPROVAL DATE:</b>		
<b>FUNDING/EXPENDITURE INFORMATION</b>		
a. Funding/Grant Amount	\$	
b. Funds Received to Date	\$	
<b>Funds Allocated in the Following Manner:</b>		
c.	\$	
d.	\$	
e.	\$	
f.	\$	
g.	\$	
<p><b><u>SIGNATURE OF PERSON AUTHORIZED IN AGREEMENT</u></b></p> <p>I hereby certify that the foregoing is a complete report of all additional funding that has/will be received, directly or indirectly, in addition to the funds received by CareerSource CLM in reference to the Project.</p> <p>_____</p>		
Signature: _____	Title _____	Date _____

FM-WC-019.Rev. Feb 1, 2013

## EXHIBIT IX

### Sub-recipient DUNS and Federal Award Identifiers

#### 1. Federal Award Identification

- Grant: Youth Build
- Subrecipient: Eckerd Connects
- DUNS number: 080681158
- Federal Award Identification Number: YB-38216-22-60-A-12
- Federal Award Date: 09/01/2019 & 5/1/2022
- Sub-award Performance Period: 7/1/2023 – 06/30/2024
- Federal Funds Obligated: \$32,582.00 & \$303,515.00
- Funds Obligated to Sub-recipient: \$32,582.00 & \$303,515.00
- Federal Award Amount: \$766,000.00, \$740,737.00, \$844,712.00
- Federal Awarding Agency, Pass-through entity, and Awarding Official Contact:
  - Department of Labor
  - CareerSource Citrus Levy Marion
  - Eric Dent – FPO
    - 404-302-5349 (phone)
    - 770-597-1802 (mobile)
    - [Dent.Eric@dol.gov](mailto:Dent.Eric@dol.gov)
- CFDA: 17.274, 17.259, 17.258, 17.278, 17.274
- Is Award considered a Research and Development Award: N/A
- Indirect Cost Rate for the Federal 15.7%
- Sub-recipient Indirect Cost Rate: 13.6% Provisional rate

#### 2. Requirements/Additional Requirements: explained in included Scope of Work



**EXHIBIT X**  
**Authorization to Incur Travel**  
**Program Year 2022-2023**  
**Eckerd Youth Alternatives**

STAFF NAME	POSITION/TITLE	TRAVEL ESTIMATE
Kimberly Grey	Operations Director	120
Heaven Colon	Program Manager	750
Shannon Mills	Lead Career Coach/YouthBuild	200
Edward Deskovic	Workforce Career Coach	100
Brittney Fish	Workforce Career Coach	100
Talia Kong-quee	Retention Specialist	480
Victoria Wilson-Reich	Workforce Career Coach	Exempt (Non-Driver)
	Total Mileage for All Staff:	1750

Travel Justification: Attends local, community and out-of-state meetings, board/committee meetings, partner workgroups, meetings with subcontractors, training opportunities, events and conferences requiring vicinity mileage travel.

## EXHIBIT XI

### Contractor Disclosure

For the purposes of the contract between CareerSource Citrus Levy Marion (Regional Workforce Board)

and Eckerd Connects (Contractor), the following disclosure is made:

The principals\* and owners\* of the contracting entity:

  X   have no relative\*\* who is a member of the board;

           have a relative\*\* who is a member of the board, whose name is

\_\_\_\_\_

(See list of board members attached)

There is/is not (circle one) a principal or owner who is a member of the board. If applicable, the principal's or owner's name is \_\_\_\_\_.

There is/is not (circle one) a principal or owner who is an employee of the board. If applicable, the principal's or owner's name is \_\_\_\_\_.

\*"Principal" means an owner or high-level management employee with decision-making authority.

\*"Owner" means a person having any ownership interest in the contractor.

\*\*"Relative" means father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, or daughter-in-law. 112.3143(1)(b), Fla. Stat.

I hereby certify that the information above is true and correct.

Date: June 29, 2023

Signature of Authorized Representative:



Name of Authorized Representative (print): Randall W. Luecke, CFO

**SIGNATURE PAGE**

IN WITNESSES WHEREOF, the parties hereto have duly executed this Contract Modification and in signing on the date written below, thereby validating this Contract Modification, the parties also certify that each possesses legal authority to contract and bind their respective organizations in their capacity as a signatory official.

CITRUS LEVY MARION REGIONAL  
WORKFORCE DEVELOPMENT BOARD, INC.

Eckerd Connects

BY: 

BY: 

Signature

Signature

Brandon Whiteman

Randall W. Luecke

Typed/Printed Name of Signee

Typed/Printed Name of Signee

Board Chair

CFO

Title

Title

7/18/23  
Date

June 29, 2023  
Date

All equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by using TTY/TDD equipment via the Florida Relay Service at 711. If you need accommodations, call 1-800-434-6627 ext. 7878 or e-mail [info@floridarelay.com](mailto:info@floridarelay.com) or [info@floridarelay.com](mailto:info@floridarelay.com) three business days in advance. A proud member of the American Job Center network.



**Agreement Between**  
**Citrus Levy Marion Regional Workforce Development Board, Inc.**  
**(CLMRWDB) d/b/a CareerSource Citrus Levy Marion**  
**and**  
**Southern Indiana Works**

This agreement is entered into between the Citrus Levy Marion Regional Workforce Development Board, Inc., d/b/a CareerSource Citrus Levy Marion and hereinafter referred to as "CSCLM" or "Grantee," and Southern Indiana Works, hereinafter referred to as "Contractor," by which Contractor agrees to assist in the definition of and selection of a One Stop Operator as required under the Workforce Innovation and Opportunity Act (WIOA).

**WHEREAS** Contractor has entered into an agreement with CSCLM to work with CSCLM, the Executive Committee and Board of Directors.

**WHEREAS** Contractor has agreed to function as the One Stop Operator for CareerSource Citrus Levy Marion.

**WHEREAS** the Contractor will execute all applicable functions of a One Stop Operator as contained in the scope of work.

**NOW, THEREFORE**, in consideration of the mutual covenants and promises contained herein, the parties hereto agree as follows:

**1. Term.**

The term of this Agreement begins upon the execution of this Agreement by all parties but no earlier than July 1, 2023 and ends June 30, 2024. CSCLM reserves the right to engage Contractor in other aspects related to the scope of work contained in this contract, pending negotiations acceptable to both CSCLM and Contractor. This contract is renewable for a period of three additional program years with final contract renewal ending June 30, 2027. This contract may be renewed annually at the discretion of CSCLM and Southern Indiana Works.

**2. Scope of Work.**

See Attachment A for the Scope of Work.

### 3. Budget/Invoicing Schedule.

See Attachment B for the Budget and Invoicing Table. Payments will be made monthly to the contractor based on the total actual hours and benchmark activities per Attachment B. This budget is agreed upon in a "not to exceed" format for each position and total hours shown in Attachment B. The scope of work and overall cost of the contract may be altered only through modification of this agreement as agreed upon by CSCLM and Southern Indiana Works. Contractor agrees to submit detailed billing for each quarter of work conducted.

### 4. Contract Provisions:

**De-obligation of Funds:** If at any time State or Federal funds in support of this Agreement become unavailable, this Contract shall be terminated immediately upon written notice of such fact by CSCLM to the Contractor. In the event of termination, the Contractor shall be entitled to payment for approved incurred costs only to the extent that funds are made available to CSCLM to make such payments.

**Access to Records:** The Contractor agrees that the Comptroller General of the United States, the Secretary of Labor, CSCLM, or any of their duly authorized representatives shall have access to all records pertaining to the payments made to the Contractor under this Contract including any relevant financial records, supporting documentation, statistical records and all other pertinent records of the Contractor including transactions related to this Contract.

**Retention of Records:** The Contractor further agrees to retain such records for five years following the end of this agreement period. And further agrees that if any litigation, audit, or claim remains unresolved at the expiration of the aforementioned period, then the records will be retained until all outstanding issues have been resolved.

**Hold Harmless:** The Contractor shall hold harmless CSCLM, its officers, agency employees, and funding sources from any and all liabilities and claims of any kind, including death, sickness or injury to persons or property from any cause whatsoever arising from or connected with the operations or the services of the Contractor, his agents, representatives, or employees. The Contractor assumes responsibility for any adverse liabilities (including back pay judgments) emanating from any complaint or non-compliance or fraud and abuse found against the Contractor.

**Governmental Rules and Regulations:** The Contractor warrants the performance of all obligations specified in this Agreement in accordance with the terms and conditions of any and all Federal and State rules and regulations now existing or hereafter promulgated which are applicable to the performance of this Contract. Official publication of such rules and regulations shall be deemed to be sufficient notice.

**Termination for Convenience:** CSCLM or Contractor may terminate this agreement upon thirty (30) days written notice to the other party. In the event of a termination for convenience, CSCLM shall be responsible for any outstanding allowable costs incurred up through the date of receipt of the termination notice. The Contractor shall



be responsible for their obligations up through the date of receipt of notice of termination.

**Termination for Cause:** CSCLM may terminate immediately the whole or any part of this Contract if the Contractor fails to provide proper training as determined by the CSCLM or if the participant is failing to make adequate progress in the Contractor's program. If, through any cause, the Contractor fails to fulfill the obligations under this Agreement, or if the Contractor violates any covenants or stipulations of this Agreement, CSCLM shall thereupon have the right to terminate this Agreement by giving written notice to the Contractor of such termination. The Contractor shall be entitled to receive payment only for approved costs incurred prior to the effective date of the termination.

**Termination for Non-Performance:** Failure to comply with any of the terms and conditions of this Contract shall constitute grounds for termination. This contract may be terminated for non-performance for either the Contractor or CSCLM or following written notice to the other party. Such notice must be posted by the other party, and must be posted by the other party, and must be posted by certified mail/return receipt requested and must specify and document the reason (s) for termination.

**Americans with Disabilities Act of 1992:** The Contractor shall ensure compliance with the Americans with Disabilities Act of 1992 which prohibits discrimination on the basis of a disability and promotes the integration of reasonable accommodations as a responsibility.

**Provision against Assignment:** The Contractor shall not assign or subcontract any interest in the Agreement without prior written consent of CSCLM.

**Non-Discrimination:** The Contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, national origin, age, creed, disability, veteran status, or political affiliation. The Contractor agrees to comply with Public Law 97-300, Title VI and VII of the Civil Rights Act of 1964, as amended; Age Discrimination Act of 1975, as amended; Section 504 of the Rehabilitation Act of 1973 as amended by the Americans with Disabilities Act of 1990, Title IX of the Education Amendments of 1972, as amended; Workforce Investment Act of 1998 (WIA) 29 CFR 37, including the Nontraditional Employment for Women Act of 1991; and the Florida's Human Rights Act of 1977; and with all applicable requirements imposed by or pursuant to regulations implementing those laws, including but not limited to 29 CFR part 37.

**As specified in the Sarbanes-Oxley Act of 2002 and Section 1553, Federal Acquisition Regulation Case 2009-012, ARRA:** It is illegal for any corporate entity to punish whistleblowers or retaliate against any employee who reports suspected cases of fraud or abuse (SOX, Section 1107, Section 1513 of Title 18, USC). It is a crime to alter, cover up, falsify, or destroy any document that may be relevant to an official investigation (SOX, Section 1102, Section 1512 of Title 18, USC).

**Debarment, Suspension, Ineligibility and Voluntary Exclusion:** Contractor certifies that neither it nor its principals are presently disbarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction by any Federal department or agency.

**Political, Sectarian and Lobbying Activity Prohibited:** None of the funds, materials, property, or services provided directly or indirectly under this agreement shall be used in the performance of this contract for any partisan political activity, or to further the election or defeat of any candidate for public office. None of the funds provided under this agreement shall be used for publicity for lobbying and/or propaganda purposes designed to support or defeat legislation pending before the Congress of the United States of America or the Legislature of the State of Florida.

**Disputes:** All disputes shall be resolved informally between the Contractor and CSCLM. If resolution does not occur to the satisfaction of any party, the first step is to use existing grievance procedures, if any, established by the Contractor (employer) to resolve disputes with Employees. If the Contractor has no internal grievance procedures, or if the dispute remains unresolved, the parties agree to participate in and be bound by the determinations resulting from CSCLM grievance and complaint procedures.

**Modifications:** This Agreement may be modified at any time by execution of a written signed modification by both parties.

**Monitoring and Audits:** The Contractor agrees that CSCLM and/or authorized local, State and Federal representatives have the right to monitor, audit, and review the progress of training and any documents and records pertaining to training for compliance with the terms of this contract.

**Stevens Amendment:** Contract #PY-21-LOA-05 is supported by the Employment and Training Administration of the U.S. Department of Labor as part of an award totaling \$6,200,000.00 with no percentage financed from non-governmental sources.


\*\*\*\*\*REMAINDER OF PAGE LEFT BLANK\*\*\*\*\*

## CONFLICT OF INTEREST STATEMENT/CERTIFICATION

The Contractor must execute either Section I or Section II hereunder relative to Florida Statute 112.313(12). Failure to execute either Section may result in rejection of this Contract.

### SECTION I

I hereby certify that no official or employee of the Grantee or independent agency requiring the goods or services described in these specifications has a material financial interest in this company.

  
Signature

Anthony A. Watson  
Name of Official (Type or Print)

6-15-23  
Date

Southern Indiana Works  
Company Name

2125 State St. Suite 16  
Business Address

New Albany, IN 47150  
City, State, Zip Code

### SECTION II

I hereby certify that the following named Grantee official(s) and employee(s) having material financial interest(s) [in excess of 5%] in this company have filed the appropriate Conflict of Interest statements with the Grantee prior to the beginning date of this Contract.

Name	Title or Position	Date of Filing
_____	_____	_____
_____	_____	_____
_____	_____	_____

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Name of Certifying Official

\_\_\_\_\_  
Business Address

\_\_\_\_\_  
Date

\_\_\_\_\_  
City, State, Zip Code



**CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER  
MATTERS**

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

## CERTIFICATION REGARDING LOBBYING

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

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

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

**SWORN STATEMENT UNDER SECTION 287.133(3)(A),  
FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES**

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

**STATE OF**

**COUNTY OF**

**Before me, the undersigned authority, personally appeared**

Anthony A. Watson, who, being by me first duly sworn,  
made the following statement:

**The business address of (Contractor)** Southern Indiana Works

is 2125 State Street Suite 16  
New Albany, IN 47150

**My relationship to (Contractor)** Southern Indiana Works

is President & CEO (relationship  
such as sole proprietor, partner, president, vice-president).

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

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

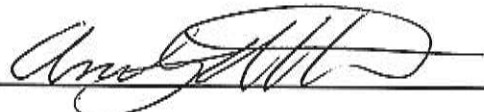
(Draw a line through paragraph 6 if paragraph 7 below applies.)

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

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

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

Signature/Date:

 4-12-23

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

mentioned above on the 12 day of April, 2002023.

  
Notary Public

(affix seal)

Tara Cox  
Notary Public Printed Name

TARA COX  
NOTARY PUBLIC - SEAL  
STATE OF INDIANA  
COMMISSION NUMBER NP0744549  
MY COMMISSION EXPIRES OCT. 26, 2030

**CERTIFICATION REGARDING NONDISCRIMINATION & EQUAL OPPORTUNITY  
ASSURANCES**

(29 CFR Part 37 and 45 CFR Part 80)

As a condition of the award of financial assistance from the Department of Labor under Title 1 of the WIOA, the CONTRACTOR assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

1. Section 188 of the Workforce Innovation and Opportunity Act (WIOA) which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation, or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title I B financially assisted program or activity;
2. Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color, and national origin;
3. Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities;
4. The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and
5. Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs.

The CONTRACTOR also assures that it will comply with 29 C.F.R. Part 37 and all other regulations implementing the laws listed above. This assurance applies to the CONTRACTOR'S operation of the WIOA Title I – financially assisted program or activity, and to all agreements the CONTRACTOR makes to carry out the WIOA Title I – financially assisted program or activity. The Contractor understands that Grantee and the United States has the right to seek judicial enforcement of the assurance.

**CERTIFICATION OF ASSURANCE OF COMPLIANCE WITH TITLE VI OF THE CIVIL  
RIGHTS ACT OF 1964, SECTION 504 OF THE REHABILITATION ACT OF 1973, TITLE  
IX OF THE EDUCATION AMENDMENTS OF 1972, AND THE AGE DISCRIMINATION  
ACT OF 1975**

The CONTRACTOR provides this assurance in consideration of and for the purpose of obtaining Federal grants, loans, contracts, property, discounts or other Federal financial assistance from the Department of Health and Human Services.

THE CONTRACTOR HEREBY AGREES THAT IT WILL COMPLY WITH:

1. Title VI of the Civil Rights Act of 1964 (Pub. L. 88-352), as amended, and all requirements imposed by or pursuant to the Regulation of the Department of Health and Human Services (45 C.F.R. Part 80), to the end that, in accordance with Title VI of that Act and the Regulation, no person in the United States shall, on the ground of race, color, or national



origin, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which the Applicant receives Federal financial assistance from the Department.

2. Section 504 of the Rehabilitation Act of 1973 (Pub. L. 93-112), as amended, and all requirements imposed by or pursuant to the Regulation of the Department of Health and Human Services (45 C.F.R. Part 84), to the end that, in accordance with Section 504 of that Act and the Regulation, no otherwise qualified handicapped individual in the United States shall, solely by reason of his handicap, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity for which the Applicant receives Federal financial assistance from the Department.

3. Title IX of the Educational Amendments of 1972 (Pub. L. 92-318), as amended, and all requirements imposed by or pursuant to the Regulation of the Department of Health and Human Services (45 C.F.R. Part 86), to the end that, in accordance with Title IX and the Regulation, no person in the United States shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any education program or activity for which the Applicant receives Federal financial assistance from the Department.

4. The Age Discrimination Act of 1975 (Pub. L. 94-135), as amended, and all requirements imposed by or pursuant to the Regulation of the Department of Health and Human Services (45 C.F.R. Part 91), to the end that, in accordance with the Act and the Regulation, no person in the United States shall, on the basis of age, be denied the benefits of, be excluded from participation in, or be subjected to discrimination under any program or activity for which the Applicant receives Federal financial assistance from the Department.

The CONTRACTOR agrees that compliance with this assurance constitutes a condition of continued receipt of Federal financial assistance, and that it is binding upon the Contractor, its successors, transferees, and assignees for the period during which such assistance is provided. If any real property or structure thereon is provided or improved with the aid of Federal financial assistance extended to the Contractor by the Department, this assurance shall obligate the Applicant, or in the case of any transfer of such property, any transferee, for the period during which the real property or structure is used for a purpose for which the Federal financial assistance is extended or for another purpose involving the provision of similar services or benefits. If any personal property is so provided, this assurance shall obligate the Applicant/Recipient for the period during which it retains ownership or possession of the property. The Applicant/Recipient further recognizes and agrees that the United States shall have the right to seek judicial enforcement of this assurance.

**Certification of Compliance with E.O. 11246, "Equal Employment Opportunity," as amended by E.O. 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and as supplemented by regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."**

(2 CFR 180.220(b) and 29 CFR 95 Appendix A(1))

**EQUAL OPPORTUNITY FOR WORKERS WITH DISABILITIES**

1. The contractor will not discriminate against any employee or applicant for employment because of physical or mental disability in regard to any position for which the employee or applicant for employment is qualified. The contractor agrees to take affirmative action to employ and advance in employment individuals with disabilities, and to treat qualified individuals without discrimination on the basis of their physical or mental disability in all employment practices, including the following:
  - i. Recruitment, advertising, and job application procedures;
  - ii. Hiring, upgrading, promotion, award of tenure, demotion, transfer, layoff, termination, right of return from layoff and rehiring;
  - iii. Rates of pay or any other form of compensation and changes in compensation;
  - iv. Job assignments, job classifications, organizational structures, position descriptions, lines of progression, and seniority lists;
  - v. Leaves of absence, sick leave, or any other leave;
  - vi. Fringe benefits available by virtue of employment, whether or not administered by the contractor;
  - vii. Selection and financial support for training, including apprenticeship, professional meetings, conferences, and other related activities, and selection for leaves of absence to pursue training;
  - viii. Activities sponsored by the contractor including social or recreational programs; and
  - ix. Any other term, condition, or privilege of employment.
2. The contractor agrees to comply with the rules, regulations, and relevant orders of the Secretary of Labor issued pursuant to the act.
3. In the event of the contractor's noncompliance with the requirements of this clause, actions for noncompliance may be taken in accordance with the rules, regulations, and relevant orders of the Secretary of Labor issued pursuant to the act.
4. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices in a form to be prescribed by the Director, Office of Federal Contract Compliance Programs, provided by or through the contracting officer. Such notices shall state the rights of applicants and employees as well as the contractor's obligation under the law to take affirmative action to employ and advance in employment qualified employees and applicants with disabilities. The contractor must ensure that applicants or employees with disabilities are provided the notice in a form that is accessible and understandable to the individual applicant or employee (e.g., providing Braille or large print versions of the notice, or posting a copy of the notice at a lower height for easy viewing by a person using a wheelchair). With respect to employees who do not work at a physical location of the contractor, a contractor will satisfy its posting obligations by posting such notices in an electronic format, provided that the contractor provides computers, or access

to computers, which can access the electronic posting to such employees, or the contractor has actual knowledge that such employees otherwise are able to access the electronically posted notices. Electronic notices for employees must be posted in a conspicuous location and format on the company's intranet or sent by electronic mail to employees. The contractor must use an electronic posting to notify job applicants of their rights if the contractor utilizes an electronic application process. Such electronic applicant notice must be conspicuously stored with, or as part of, the electronic application.

5. The contractor will notify each labor organization or representative of workers with which it has a collective bargaining agreement or other contract understanding, that the contractor is bound by the terms of section 503 of the Rehabilitation Act of 1973, as amended, and is committed to take affirmative action to employ and advance in employment, and shall not discriminate against, individuals with physical or mental disabilities.

6. The contractor will include the provisions of this clause in every subcontract or purchase order in excess of \$10,000, unless exempted by the rules, regulations, or orders of the Secretary issued pursuant to section 503 of the act, as amended, so that such provisions will be binding upon each subcontractor or Contractor. The contractor will take such action with respect to any subcontract or purchase order as the Director, Office of Federal Contract Compliance Programs may direct to enforce such provisions, including action for noncompliance.

7. The contractor must, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment and will not be discriminated against on the basis of disability.

**Additional Certifications Applicable to this Contractor/Contract**  
**The contractor assures compliance with each of the additional required**  
**certifications**

1. Trafficking Victims Protection Act of 2000: RWBs must include the requirements shown below in any grant you make to a private entity.

You as the recipient, your employees, subrecipients under this award, and subrecipients' employees may not—

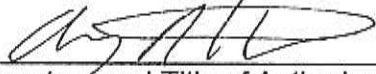
- I. Engage in severe forms of trafficking in persons during the period of time that the award is in effect;
  - II. Procure a commercial sex act during the period of time that the award is in effect; or
  - III. Use forced labor in the performance of the award or subawards under the award.
2. Veteran's Priority of Service Provisions: Contractor agrees to be governed by the priority of service requirements of 38 USC 4215 and 20 CFR Part 1010. Section 4215 of Title 38 requires that priority of service be provided to veterans and spouses of certain service members and veterans for the receipt of employment, training, and placement services. Agreement by a program operator to implement priority of service is a condition of receipt of DOL funds.



3. **Equal Treatment for Faith-Based Organizations.** Prohibits any State or local government receiving funds under any Department program, or any intermediate organization with the same duties as a governmental entity, from discriminating for or against an organization on the basis of the organization's religious character or affiliation. Prohibits religious organizations from engaging in inherently religious activities, such as worship, religious instruction, or proselytization, as part of the programs or services funded with direct financial assistance. Prohibits an organization that participates in programs funded by direct financial assistance from the Department, in providing services, from discriminating against a program beneficiary or prospective program beneficiary on the basis of religion or religious belief. Any restrictions on the use of grant funds shall apply equally to religious and non-religious organizations.
4. **Environmental Tobacco Smoke.** In accordance with Part C of P.L. 103-227, the "Pro-Children Act of 1994," smoking is prohibited in any portion of any indoor facility owned or leased or contracted by an entity and used regularly for the provision of health, day care, education, or library services to children under the age of 18, if the services are funded by Federal programs whether directly or through State or local governments. Federal Programs include grants, cooperative agreements, loans, and loan guarantees, and contracts. The law does not apply to children's services provided in private residences, facilities funded solely by Medicare or Medicaid funds, and portions of facilities used for inpatient drug and alcohol treatment.
5. **Purchase of American-Made Equipment and Products:** Contractor assures that, to the greatest extent practicable, all equipment and products purchased with funds made available in this Act will be American-made.

The person or persons whose signature(s) appear(s) below is/are authorized to agree to and sign these assurances and commit the CONTRACTOR to all of the above provisions.

6-15-23  
Date

  
Signature and Title of Authorized Official

Southern Indiana Tobacco  
Name of Contractor

2125 State St Suite 16  
Street

New Albany IN 47150  
City, State, ZIP Code

## **52.204-25 Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment**

As prescribed in 4.2105(b):

### **Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment (Nov 2021)**

(a) Definitions. As used in this clause— Backhaul means intermediate links between the core network, or backbone network, and the small subnetworks at the edge of the network (e.g., connecting cell phones/towers to the core telephone network). Backhaul can be wireless (e.g., microwave) or wired (e.g., fiber optic, coaxial cable, Ethernet). Covered foreign country means The People's Republic of China. Covered telecommunications equipment or services means— (1) Telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities); (2) For the purpose of public safety, security of Government facilities, physical security surveillance of critical infrastructure, and other national security purposes, video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities); (3) Telecommunications or video surveillance services provided by such entities or using such equipment; or (4) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, in consultation with the Director of National Intelligence or the Director of the Federal Bureau of Investigation, reasonably believes to be an entity owned or controlled by, or otherwise connected to, the government of a covered foreign country. Critical technology means— (1) Defense articles or defense services included on the United States Munitions List set forth in the International Traffic in Arms Regulations under subchapter M of chapter I of title 22, Code of Federal Regulations; (2) Items included on the Commerce Control List set forth in Supplement No. 1 to part 774 of the Export Administration Regulations under subchapter C of chapter VII of title 15, Code of Federal Regulations, and controlled- (i) Pursuant to multilateral regimes, including for reasons relating to national security, chemical and biological weapons proliferation, nuclear nonproliferation, or missile technology; or (ii) For reasons relating to regional stability or surreptitious listening; (3) Specially designed and prepared nuclear equipment, parts and components, materials, software, and technology covered by part 810 of title 10, Code of Federal Regulations (relating to assistance to foreign atomic energy activities); (4) Nuclear facilities, equipment, and material covered by part 110 of title 10, Code of Federal Regulations (relating to export and import of nuclear equipment and material); (5) Select agents and toxins covered by part 331 of title 7, Code of Federal Regulations, part 121 of title 9 of such Code, or part 73 of title 42 of such Code; or (6) Emerging and foundational technologies controlled pursuant to section 1758 of the Export Control Reform Act of 2018 (50 U.S.C. 4817). Interconnection arrangements means arrangements governing the physical connection of two or more networks to allow the use of another's network to hand off traffic where it is delivered (e.g., connection of a customer of telephone provider A to a customer of telephone company B) or sharing data and other information resources. Reasonable inquiry means an inquiry designed to uncover any information in the entity's possession about the identity of the producer or provider of covered telecommunications equipment or services used by the entity that excludes the need to include an internal or third-party audit. Roaming means cellular communications services (e.g., voice, video, data) received from

a visited network when unable to connect to the facilities of the home network either because signal coverage is too weak or because traffic is too high. Substantial or essential component means any component necessary for the proper function or performance of a piece of equipment, system, or service.

(b) Prohibition. (1) Section 889(a)(1)(A) of the John S. McCain National Defense Authorization Act for Fiscal Year 2019 (Pub. L. 115-232) prohibits the head of an executive agency on or after August 13, 2019, from procuring or obtaining, or extending or renewing a contract to procure or obtain, any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. The Contractor is prohibited from providing to the Government any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system, unless an exception at paragraph (c) of this clause applies or the covered telecommunication equipment or services are covered by a waiver described in FAR 4.2104.

(c) of this clause applies or the covered telecommunication equipment or services are covered by a waiver described in FAR 4.2104. This prohibition applies to the use of covered telecommunications equipment or services, regardless of whether that use is in performance of work under a Federal contract. (c) Exceptions. This clause does not prohibit contractors from providing— (1) A service that connects to the facilities of a third-party, such as backhaul, roaming, or interconnection arrangements; or (2) Telecommunications equipment that cannot route or redirect user data traffic or permit visibility into any user data or packets that such equipment transmits or otherwise handles.

(d) Reporting requirement. (1) In the event the Contractor identifies covered telecommunications equipment or services used as a substantial or essential component of any system, or as critical technology as part of any system, during contract performance, or the Contractor is notified of such by a subcontractor at any tier or by any other source, the Contractor shall report the information in paragraph (d)(2) of this clause to the Contracting Officer, unless elsewhere in this contract are established procedures for reporting the information; in the case of the Department of Defense, the Contractor shall report to the website at <https://dibnet.dod.mil>. For indefinite delivery contracts, the Contractor shall report to the Contracting Officer for the indefinite delivery contract and the Contracting Officer(s) for any affected order or, in the case of the Department of Defense, identify both the indefinite delivery contract and any affected orders in the report provided at <https://dibnet.dod.mil>. (2) The Contractor shall report the following information pursuant to paragraph (d)(1) of this clause

- (i) Within one business day from the date of such identification or notification: the contract number; the order number(s), if applicable; supplier name; supplier unique entity identifier (if known); supplier Commercial and Government Entity (CAGE) code (if known); brand; model number (original equipment manufacturer number, manufacturer part number, or wholesaler number); item description; and any readily available information about mitigation actions undertaken or recommended.

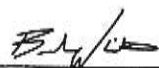
- (ii) (ii) Within 10 business days of submitting the information in paragraph (d)(2)(i) of this clause: any further available information about mitigation actions undertaken or recommended. In addition, the Contractor shall describe the efforts it undertook to prevent use or submission of covered telecommunications equipment or services, and any additional efforts that will be incorporated to prevent future use or submission of covered telecommunications equipment or services. (e) Subcontracts. The Contractor shall insert the substance of this clause, including this paragraph (e) and excluding paragraph (b)(2), in all subcontracts and other contractual instruments, including subcontracts for the acquisition of commercial products or commercial services.

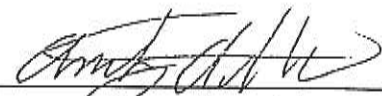
**SIGNATURE PAGE**

The signing parties hereto have caused this Agreement to be executed by their duly authorized representatives. The signing parties agree to comply with all the terms and provisions of this agreement, including any and all attachments. This agreement will remain in effect unless terminated in writing by representatives of CSCLM or Southern Indiana Works and Associates.

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

Approved for Southern Indiana Works

Signed:   
Name: Brandon Whiteman  
Title: Board Chair  
Date: 06/15/2023

Signed:   
Name: Anthony A. Waterson  
Title: President & CEO  
Date: 4-15-23

CareerSource Citrus Levy Marion is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers listed above may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711. If you need accommodations, please call 352-840-5700, ext. 7878 or e-mail [accommodations@careersourceclm.com](mailto:accommodations@careersourceclm.com) at least three business days in advance. Additionally, program information may be made available in Spanish upon request. A proud member of the American Job Center network.

## **Attachment A**

### **Scope of Work**

- **Quarter 1:**
  - Presentation of work plan and goals to WDB
  - Communication with all MOU partners, meeting either in person or virtually
  - Visit all three career centers
  - Participation virtually in Board committee meetings as requested by CSCLM leadership
- **Quarter 2:**
  - Hold biannual partner convening with 70% participation
  - Visit all three career centers
  - Participation virtually in Board committee meetings as requested by CSCLM leadership
- **Quarter 3:**
  - Visit all three career centers
  - Participate in person in Career Center Committee meeting
  - Participation virtually in Board committee meetings as requested by CSCLM leadership
  - Conduct training for staff and partners in alignment with CSCLM leadership goals
- **Quarter 4:**
  - Hold biannual partner convening with 70% participation
  - Completed MOUs
  - Visit all three career centers
  - Participation virtually in Board committee meetings as requested by CSCLM leadership

### **Work Plan**

Upon contract award and within the first two weeks of engagement, the OSO Team will meet virtually with the CSCLM Leadership to discuss the current state of system partnerships, MOU agreements, Strategic Plan implementation/progress, and any other relevant topics to get an updated understanding of the talent development landscape in the area. We will begin to discuss CSCLM's goals for the OSO and perspectives on current strengths and areas of opportunity. Upon completion of the call, the OSO Team will review all relevant documents including but not limited to:

- Current Memorandum of Understanding (MOUs) and Infrastructure Funding Agreements



- CSCLM current Strategic Plan
- CSCLM current WIOA Local Plan
- CSF State WIOA Plan
- Regional partner strategic plans

After completing the launch, the OSO Team will work with CSCLM's OSO Point of Contact (POC) to finalize a workplan including a timeline for on-site visits and any identified priorities from the launch meeting.

The OSO Team will actively coordinate services among workforce development partners through onsite visits, virtual meetings, and consistent communication.

The OSO Team will be on-site a minimum of four (4) times annually. A typical schedule may be as follows:

- Day 1 – OSO Team arrive in Central Florida and facilitate an afternoon meeting with CSCLM Leadership. Partner meetings in the late afternoon or evening.
- Day 2 – Visit and observe Career Center in the morning while meeting with staff and talking with program participants. Afternoon meeting(s) with partners.
- Day 3 – Visit and observe two Career Centers in the morning and afternoon while meeting with staff and talking with program participants.
- Day 4 – Partner meeting(s) in the morning and depart Central Florida in the afternoon.

We will align the first quarterly visit with the first full Workforce Development Board meeting of the year to meet with Board members and introduce the scop of work and goals. We will also utilize this trip to meet with several MOU partners to begin discussions around renewed MOUs.

During the second quarterly visit, the OSO team will prioritize meeting with any outstanding MOU partners to finalize and execute MOUs. The OSO team also proposes holding biannual MOU partner convenings, the first of which would occur in quarter two. We will host a lunch for partners to discuss alignment opportunities, referral processes, and common issues that could use collaborative solution.

During the third quarter of the program year, we will align the on-site visit with the Career Center Committee's in person meeting. The OSO team also proposes to develop a training for CSCLM and/or partner staff to provide an added professional development opportunity for keeping partners on the same page. If appropriate, we will work with CSCLM leadership to determine suitable topics and priorities.

In the fourth quarter, the OSO team's onsite visit will include the second biannual partner convening, in addition to regular partner engagement and center visits.

The OSO team will work with CSCLM to align travel and activities with existing schedules and shift priorities throughout the year. Each visit will be followed by a virtual exit meeting

with CSCLM leadership. The OSO team will also be available to attend Board and committee meetings virtually throughout the year.

We will stay in close communication with the CSCLM leadership team through monthly virtual meetings to ensure these priorities are met. We will discuss progress and changes which the CSCLM team would like OSO assistance, such as any additional staff training topics or facilitation or special project planning.

Each quarter, the OSO team will submit a quarterly Report on activities completed and recommendations for future growth or change. This report will be written to be shared widely to ensure staff and board transparency.



## Attachment B

### Budget Narrative

The OSO team will consist of Tony Waterson, President, and CEO at an hourly rate of \$101.00 and Kristen Barry, Strategic Consultant at an hourly rate of \$96.00. The OSO Team estimates that each member will dedicate approximately 226 hours annually to the contract. Travel cost is inclusive of transportation, lodging, and meals.

Category	Amount
Wages and Fringe Benefits	\$53,000.00
Travel	\$12,000.00
Supplies	\$1,200.00
Technology	\$2,400.00
Operations/Administrative	\$6,400.00
Total	\$75,000.00

### Reasonableness of Costs

The cost for this contract has been calculated based on hours historically billed to specific tasks as the incumbent, as well as the number of hours we believe it will take to achieve new tasks outlined in the work plan. This is inclusive of all costs associated with staff salaries, fringe benefits, travel, supplies, technology, etc.



## **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.

Certification as To Proprietary And Sole Source Purchases  
and Negotiation with Governmental Agencies and Institutions

TO: Thomas E. Skinner Jr., Chief Executive Officer  
Dale French, Executive Vice President

\*\*\*\*\*

(CHECK A, B or C)

- A. ☐ Proprietary Purchase available from more than one source.  
B. ☒ Sole Source Purchase of a proprietary item available from only one source.  
C. ☐ Negotiation with Governmental Agencies and Institutions

PROPRIETARY PURCHASE (Must be filled out if "A" or "B" is checked)

The undersigned certifies that the specific make, brand, model, or vendor specified on the accompanying Purchase Order # \_\_\_\_\_ or Check Request is the ONLY make, brand, model or vendor which will fulfill the intended need for the following reasons:

SOLE SOURCE (Must be filled out only if "B" is checked)

The undersigned certifies that the specific make, brand, model or vendor specified on the accompanying Purchase Order # \_\_\_\_\_ is obtainable only from the following source, and for the following reason(s):

This sole source is for the procurement of the One Stop Operator as required under the Workforce Innovation and Opportunity Act. One bid was received on May 4th, 2023. It has been approved by the CLM Board of Directors to conduct sole source procurement of services from Southern Indiana Works. Approval given on 6/7/2023.

NEGOTIATION WITH GOVERNMENTAL AGENCIES & INSTITUTIONS (Must be filled out if "C" is checked)

The undersigned certifies that the vendor specified on the accompanying Purchase Order # \_\_\_\_\_ is obtainable through negotiation with governmental agencies and institutions.

OTHER SOURCES CHECKED (List the companies contacted to provide purchase item)

\*\*\*\*\*

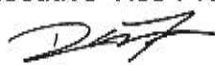
Requestor Signature: Cathy Galica Date: 06/01/2023

\*\*\*\*\*

**EVP or CEO Certification required:**

Executive Vice President Certification:

Chief Executive Officer Certification:

Sign:  Sign: \_\_\_\_\_  
Dale French  
2023.06.07 16:16:53 -04'00'

Title: Executive Vice President Title: Chief Executive Officer

Phone: 873-7939 Date: \_\_\_\_\_ Phone: 873-7939 Date: \_\_\_\_\_

July, 8th, 2019

Seacoast National Bank  
815 S.W. Colorado Avenue  
Stuart, Florida 34994  
Attention: Jorge Alvarez

Re: Loan from Seacoast National Bank, a National Banking Association ("Lender") to Fran Property Investments, Inc. ("Borrower"), for the finance of the property located at Suwannee Plaza Shopping Center in Chiefland, FL ("Property").

Ladies and Gentlemen:

We understand that Lender intends to make a loan ("Loan") to the Borrower, which Loan will be evidenced by a promissory note of the Borrower and secured in part by a first mortgage lien evidenced by a mortgage and security agreement ("Mortgage") encumbering the Property. We further understand that Lender is relying upon the contents of this letter in order to consummate the Loan.

We hereby certify to Lender the following:

1. The undersigned is signing this Letter on behalf of CITRUS LEVY MARION REGIONAL WORKFORCE DEVELOPMENT BOARD, INC., (name of tenant), a tenant ("Tenant") in the Property. The Tenant is doing business as Employment, Training, and Business Development service center. A true and correct copy of the current lease ("Lease") for the occupied premises is attached hereto as Exhibit "A" and the Lease is unmodified and in full force and effect in its present form.
2. The Lease is in good standing and no defaults exist thereunder.
3. The Lease and any attachments thereto are the only agreements that exist with respect to the Tenant, the landlord under the Lease ("Landlord"), and the occupied premises.
4. The Tenant has no offsets, causes of action, counterclaims or other matters which may be interposed in an action against the Landlord for payment of rent or any other amounts due under the Lease.
5. The Lease together with all rights of the Tenant are subordinate and inferior to the lien of the Mortgage and to all the terms, conditions and provisions thereof, to all advances made or to be made thereunder, and to any renewals, extensions, modifications or replacements thereof.
6. The Tenant is currently in possession of the premises described in the Lease.
7. Tenant shall not vacate or abandon the premises at any time during the term hereof unless done so pursuant to the terms of said Lease.
8. The present rental amount under the Lease is \$2,868.75 per month. *+ 468.13 for CAM TJS*  
*4 RETI*
9. The Tenant has paid \$5000.00 as and for a security deposit under the Lease, and a total of \$0 has been currently paid under the Lease as and for advance rent for the following months:  
*6, 673.76 TJS*

<u>Month</u>	<u>Advance Rent Paid</u>	
<u>August</u>	<u>3,336.88</u>	(includes CAM+RET)
<u>September</u>	<u>3,336.88</u>	

YES

The Tenant further agrees that it will not make any further payment of rent more than one (1) month in advance.

10. The current Lease term expires on June 30, 2022.
11. Tenant and Borrower agree that upon the extension or renewal of existing lease(s), any reduction in rent exceeding 5% of the present amount shown in Paragraph 7 herein or any other rental concessions shall not be valid unless Lender's prior written consent is obtained.
12. The Tenant acknowledges that Borrower has assigned to Lender all of its rights under the Lease, including the right to collect rents and any other payments from the Tenant, and that Lender has waived its right to collect such payments until such time as Borrower is in default under the Mortgage. In consideration of the Loan to Borrower, the Tenant shall make all such payments directly to Lender, its successors or assigns upon receiving written notice from Lender that Borrower is in default under the Mortgage. Borrower has countersigned this Letter for the purpose of confirming this requirement. The Tenant shall accept such notification without ascertaining proof of its accuracy.
13. In the event of default under said Lease by either Tenant or Borrower, Lender will be notified by written notice at least 60 days prior to any action to terminate said Lease.
14. The Tenant is/is not currently paying percentage rent ("Percentage Rent") as is defined in Section 7.0 of the Lease. A schedule of Percentage Rent paid on a month by month basis, if any, during the twelve months preceding this Letter is attached hereto as Exhibit "B."
15. There are no agreements between Landlord and Tenant, or with any other party, relating to an "Option to Purchase," except those dated: N/A.
16. The Tenant agrees that where the Landlord's consent is required by the Lease prior to the Tenant's exercising its rights under the Lease to assign the Lease or sublet the premises, the Tenant shall not exercise either of these rights unless it has obtained the prior written consent of the Lender. The Tenant further agrees that it shall not modify, surrender or terminate the Lease, either orally or in writing, without the prior written consent of the Lender.
17. The signatory to this Letter has full and complete authority to sign this Letter on behalf of the Tenant.

Very truly yours,

(Tenant)

By: 

Acknowledged this \_\_\_\_\_, 2019

(Borrower)

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



Lecanto

### FIRST AMENDMENT TO BUSINESS LEASE

This First Amendment to Business Lease dated October 27, 2013, is entered into by Lewis F. Posey (hereinafter "Lessor") and the Citrus Levy Marion Regional Workforce Development Board, Inc. (hereinafter "Tenant"), collectively, the Parties

#### WITNESSETH

WHEREAS the Tenant has previously leased spaces 683, 687 and 691 from Lessor, and

WHEREAS the Parties desire to amend the lease to amend the rental rate to provide for a reduced rental payment and to extend the term of the lease,

NOW THEREFORE, the Parties desiring to be bound hereof agree as follows:

1. Recitals. The Recitals contained above are true, correct and are incorporated herein by this reference.

2. Change in agreed upon total rental. The agreed total rental under the original lease of \$197,460, is changed to \$327,000.

3. Change in 2018 Monthly Payment. The monthly payment amount for 2018 is changed as follows:

	-683-	-687-	-691-
2018- \$4,750.00 per month	\$1,770.00	\$1,630.00	\$1,350.00

4. Lease Extension. The lease is extended for a period of five (5) years at the rental rates set forth below:

	-683-	-687-	-691-
2019- \$4,500.00 per month	\$1,700.00	\$1,500.00	\$1,300.00
2020- \$4,500.00 per month	\$1,700.00	\$1,500.00	\$1,300.00
2021- \$4,500.00 per month	\$1,700.00	\$1,500.00	\$1,300.00
2022- \$4,500.00 per month	\$1,700.00	\$1,500.00	\$1,300.00
* 2023- \$4,500.00 per month	\$1,700.00	\$1,500.00	\$1,300.00

13,500 / QTR

5. Remainder of Business Lease. The remainder of the Business Lease not modified by this Amendment remains in full force and effect.

IN WITNESS WHEREOF, the parties hereto have hereunto executed this instrument for the purpose herein expressed, this 26th day of January, 2018.

Lecanto

**BUSINESS LEASE**

This Agreement entered into the 22nd day of October, 2013, between Lewis F. Posey hereinafter called the Lessor, and the Citrus Levy Marion Regional Workforce Development Board, Inc., hereinafter called the Tenant;

WITNESSETH: that the said Lessor does this day lease unto said tenant and said tenant does hereby hire or take under Lessor room(s) or space(s) 683, 687 and 691 having an address or addresses of 683 (1,456 sq ft), 687 (1,344 sq ft), and 691 (1,120 sq ft) S. Adolph Point, Lecanto FL 34461 to be used and occupied by the Tenant as a business office and for no other purposes or uses whatsoever for the term of sixty (60) months beginning on the 1st day of January, 2014 and ending on the 31st day of December, 2018 at and for the agreed total rental of \$256,260, payable monthly as follows:

	-683-	-687-	-691-
2014 - \$3,645.00 per month	\$1,370	\$1,245	\$1,030
2015 - \$4,010.00 per month	\$1,490	\$1,375	\$1,145
2016 - \$4,250.00 per month	\$1,580	\$1,455	\$1,215
2017 - \$4,550.00 per month	\$1,690	\$1,560	\$1,300
2018 - \$4,900.00 per month	\$1,820	\$1,680	\$1,400

Notwithstanding the foregoing, should Tenant experience a decrease in its annual funding of fifteen percent (15%) or more, then upon ninety (90) days written notice to Lessor, Tenant shall have the option of cancelling this lease, surrendering the premises to Lessor and upon surrendering the premises shall be released from all its obligations pursuant to the Lease, including without limitation, the obligation to pay further rent.

Tenant shall be allowed access to the leased property as soon as practicable after the current tenants vacate for the purposes of installing office furniture, computers and communications equipment, but shall not open for business prior to January 1, 2014.

All payments are to be made to the Lessor on the first day of each and every month in advance without demand and are late after the fifth day of each month. Payments are to be made to Lessor's office located at 2365 Verde Court, Hernando, FL 34442 or to such other place and to such other person as Lessor may from time to time designate in writing.

The following express stipulations and conditions are made a part of this Lease and are hereby assented to by Tenant:

FIRST: The Tenant shall not assign this lease, nor subject the premises or any part thereof nor use the same, or any part thereof, nor permit the same, nor any part thereof, to be used for any other purpose than as above stipulated, nor make any alterations therein, and all additions thereto, without the written consent of the Lessor, which shall not be unreasonably withheld.



**SECOND:** All personal property placed or moved in the premises above described shall be at the risk of the Tenant or the owner thereof and Lessor shall not be liable for any damage to said personal property, or to the Tenant arising from the bursting or leaking of water pipes, or for any act or negligence of any co-tenant or occupant of the building or of any other person whatsoever, except as provided in Paragraph ELEVENTH.

**THIRD:** The Tenant shall promptly execute and comply with all statutes, ordinances, rules, orders, regulations and requirements of the Federal, State and City Government and of any and all their departments and Bureaus applicable to said premises, for the correction, prevention, and abatement of nuisances or other grievances, in, upon, or connected with said premises during said term. At the time of Lease inception, Lessor shall have complied with and executed all orders and regulations of the Southeastern Underwriters Association for the prevention of fires, at Lessor's own cost and expense. After the inception of the Lease, changes to the rules, orders and regulations of the Southeastern Underwriter's Association requiring a change to the premises shall be the responsibility of the tenant up to a limit of \$5,000.00. Any amounts in excess of \$5,000.00 shall be the responsibility of Lessor.

**FOURTH:** In the event the premises shall be destroyed or so damaged or injured by fire or other casualty during the life of this agreement, whereby the same shall be rendered untenable, then the Lessor shall the right to render said premises tenantable by repairs within ninety (90) days therefrom. If said premises are not rendered tenantable within said time, it shall be optional with either party hereto to cancel this lease, and in the event of such cancellation the rent shall be paid only to the date of such fire or casualty. The cancellation herein mentioned shall be evidenced in writing.

**FIFTH:** The prompt payment of the rent for said premises upon the dates named, and the faithful observance of the rules and regulations printed upon this lease, and which are hereby made a part of this covenant are the conditions upon which this lease is accepted.

**SIXTH:** If the tenant shall abandon or vacate said premises before the end of the term of this lease, or shall suffer the rent to be in arrears, the Lessor may, at his option, forthwith cancel this lease or he may enter said premises as the agent of the tenant, by force or otherwise, without being liable in any way therefore, and relet the premises with or without any furniture that may be therein, as the agent of the tenant, at such price and upon such terms and for such duration of time as the Lessor may determine, and receive the rent therefore, applying the same to the payment of the rent due by these presents, and if the full rental herein provided shall be realized by Lessor over and above the expenses to Lessor in such re-letting, the said tenant shall pay any deficiency, and if more than the full rental is realized, Lessor will pay over to said tenant the excess of demand.

**SEVENTH:** In the event of any default, the prevailing party shall be entitled to recover reasonable attorneys fees and costs of litigation.

**EIGHTH:** The Tenant agrees that he will pay all charges for rent, gas, electricity or other illumination, and for all water used on said premises, and should said charges for rent, light or water herein provided for at any time remain due and unpaid for the space of five days after the



same shall have become due, the Lessor may at its option consider the said tenant a tenant at sufferance and immediately re-enter upon said premises and the entire rent for the rental period then next ensuing shall at once be due and payable and may forthwith be collected by distress or otherwise.

NINTH: The Lessor, or any of his agents, shall have the right to enter said premises during all reasonable hours, to examine the same to make such repairs, additions or alterations as may be deemed necessary for the safety, comfort, or preservation thereof, or of said building, or to exhibit said premises, and to put or keep upon the doors or windows thereof a notice "FOR RENT" at any time within thirty (30) days before the expiration of this lease. The right of entry shall likewise exist for the purpose of removing placards, signs, fixtures, alterations, or additions, which do not conform to this agreement, or to the rules and regulations of the building.

TENTH: Tenant hereby accepts the premises in the condition that they are in at the beginning of this lease and agrees to maintain said premises in the same condition, order and repair as they are at the commencement of said term, excepting only reasonable wear and tear arising from the use thereof under this agreement, and to make good to said Lessor immediately upon demand, any damage to water apparatus, or electric lights or any fixture, appliances or appurtenances of said premises, or of the building, caused by any act or neglect of Tenant, or of any person or person in the employ or under the control of the Tenant. Notwithstanding the foregoing, unless due to the negligence of Tenant, all repairs, including rebuilding in the event of partial or complete destruction of the premises, are the responsibility of the Lessor as set forth in more detail in paragraph TWENTIETH.

ELEVENTH: Except to the extent that indemnity is provided by insurance, Tenant will indemnify Lessor and hold Lessor harmless from all liability, losses, costs, damages, or expenses, including the cost of investigation and defense, that Lessor may incur with respect to any claim or demand arising out of the negligence or intentional act of Tenant, its employees, agents and servants. Except to the extent that indemnity is provided by insurance, Lessor will indemnify Tenant and hold Tenant harmless from all liability, losses, costs, damages, or expenses, including the cost of investigation and defense, that Tenant may incur with respect to any claim or demand arising out of the negligence or intentional act of Lessor, his employees agents and servants.

TWELFTH: If the Tenant shall become insolvent or if bankruptcy proceedings shall be begun by or against the Tenant, before the end of said term the Lessor is hereby irrevocably authorized at its option, to forthwith cancel this lease, as for a default. Lessor may elect to accept rent from such receiver, trustee, or other judicial officer during the term of their occupancy in their fiduciary capacity without affecting Lessor's rights as contained in this contract, but no receiver, trustee or other judicial officer shall ever have any right, title or interest in or to the above described property by virtue of this contract.

THIRTEENTH: Lessor hereby waives and renounces for himself and family any and all homestead and exemption rights he may have now, or hereafter, under or by virtue of the

constitution and laws of the State of Florida, or of any other State, or of the United States, as against the payment of said rental or any portion hereof, or any other obligation or damage that may accrue under the terms of this agreement.

**FOURTEENTH:** This contract shall bind the Lessor and its assigns or successors, and the heirs, assigns, administrators, legal representatives, executors or successors as the case may be, of the Tenant.

**FIFTEENTH:** It is understood and agreed between the parties hereto that time is of the essence of this contract and this applies to all terms and conditions contained herein.

**SIXTEENTH:** It is understood and agreed between the parties hereto that written notice mailed or delivered to the premises leased hereunder shall constitute sufficient notice to the Tenant and written notice mailed or delivered to the office of the Lessor shall constitute sufficient notice to the Lessor, to comply with the terms of this contract.

**SEVENTEENTH:** The rights of the Lessor under the foregoing shall be cumulative, and failure on the part of the Lessor to exercise promptly any rights given hereunder shall not operate to forfeit any of the said rights.

**EIGHTEENTH:** It is further understood and agreed between the parties hereto that any charges against the Tenant by the Lessor for services or for work done on the premises by order of the Tenant or otherwise accruing under this contract shall be considered as rent due and shall be included in any lien for rent due and unpaid.

**NINETEENTH:** It is hereby understood and agreed that any signs or advertising to be used, including awnings, in connection with the premises leased hereunder shall be first submitted to the Lessor for approval before installation of same.

**TWENTIETH:** Lessor in addition to being liable for the cost of structural repairs, which include but are not limited to roof, walls, floor, ceilings, glass, and after receiving written notice from tenant, and having a reasonable opportunity to obtain workman is liable for the cost of repairs of heating, air conditioning, plumbing, and electrical systems not caused by tenant neglect.

**TWENTY-FIRST:** Lessor is responsible for fire insurance of building only; no contents. Tenant at all times shall keep in force public liability and personal injury insurance along with applicable property damage insurance.

**TWENTY-SECOND:** Tenant is responsible for electric usage from Duke Energy, and water and sewer at Citrus County Utilities.

**TWENTY-THIRD:** Chair pads are to be used under all chairs with roller wheels.

**TWENTY-FOURTH:** No smoking is acknowledged as a clean and acceptable environment of all using space.

IN WITNESS WHEREOF, the parties hereto have hereunto executed this instrument for the purpose herein expressed, this 22nd day of October, 2013.

Signed, sealed and delivered in the presence of:

WITNESSES:

Lewis F. Posey  
LEWIS F. POSEY, Lessor

LEWIS F. POSEY,

Nancy Simmons

Print Name: NANCY SIMMONS

Paul V. Miller

Print Name: PAUL V. MILLER

Citrus Levy Marion Regional Workforce  
Development Board, Inc.

By:

Darlene Goddard  
DARLENE GODDARD

Its Board Chair

Tenant

Steven Gotschall

Print Name: STEVEN GOTSCHALL

Amber Davis

Print Name: AMBER DAVIS

STATE OF FLORIDA  
COUNTY OF Marion

The foregoing instrument was acknowledged before me this 22nd day of October, 2013, by Darlene Goddard, authorized on behalf of the Citrus Levy Marion Regional Workforce Development Board, Inc., who is personally known to me or has issued \_\_\_\_\_ as identification.

(Seal)



DEBRA J. ALMGREN  
MY COMMISSION # EE14047  
EXPIRES: August 2, 2014  
Bonded thru Budget Notary Services

Debra J. Almgren  
Notary Public

Print Name:

My Commission Expires: 8/3/14

# Fax

<b>To:</b>	Val Hinson/Rusty Skinner	<b>From:</b>	Lewis Posey
<b>Fax:</b>	352 873-7956	<b>Pages:</b>	6
<b>ATTN:</b>		<b>Date:</b>	10/29/13
<b>Re:</b>	Workforce Connection Lease	<b>PHONE:</b>	

Executed Business Lease 683,687,691 S. Adolph Point, Lecanto, Fl

**CONFIDENTIAL**

If you have received this fax in error, please call the above telephone number and report the fax was sent to the incorrect recipient. Information contained in the fax is considered confidential and private and is only intended for the recipient.