

Program Year 2024-2025 Unrelated Contracts over \$35,000

Name	Description	Date	Expires	Amount	Comments
Eckerd	Service Provider	7/1/2024	6/30/2025	\$870,608.00	Renewable until 6/30/2025
Southern Indiana Works	One Stop Operator	7/1/2024	6/30/2025	\$75,000.00	Renewable until 6/30/2027
College of Central Florida	Education Partner	7/1/2024	6/30/2025	\$200,000.00	Renewable until 6/30/2025
Underwood Sloan and Associates	Service Provider	7/1/2024	6/30/2026	\$50,000.00	Renewable until 6/30/2026
DTW Lecanto	Lecanto Office Lease	1/1/2024	12/1/2024	\$66,000.00	



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

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

**MODIFICATION NUMBER 4
FOR PY 2024/2025**

**COST REIMBURSEMENT/PERFORMANCE BASED CONTRACT
PACKAGE**

WITH

Eckerd Connects

TO PROVIDE PARTICIPANTS

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

CONTRACT MODIFICATION - 4

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, 2024. This modification designates the continuance of contract operations to the service provider Eckerd Connects for the program year July 1, 2024, through June 30, 2025. The continuance of this contract provider was approved by the CareerSource Citrus Levy Marion board on June 5, 2024, and will remain in effect for the life of agreement which is set to expire on June 30, 2025. 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 **\$870,608.00** 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, 2024.
14. This contract modification will be included in the contract as referenced and will be attached to the contract as Modification Number 4 for contract number PY21-LOA-06.
15. The remainder of the contract not modified by this contract modification shall remain in full force and in effect.
16. **Stevens Amendment:** 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, 2024 through June 30, 2025

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 **90** participants and will recruit and *enroll 85 additional* out-of-school participants during the **2024-2025** 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 **175** participants (**90 rollovers**; approximately **25 of the 90 rollover candidates** who were enrolled in YouthBuild/WIOA for intensive services. + **85 new enrollments**) The contractor staff will provide follow-up services to approximately **90** 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 50% of staff time under **Adult/DW funding** to perform such duties with the CareerSource Levy County Chiefland location. Contracted staff that is housed in the Chiefland office will provide Adult and Dislocated Work services to eligible adults. 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 Florida COMMERCE (FC) 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.

Statement of Work/Scope of Work

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 operations. The Contractor staff will meet regularly with CSCLM director of operations 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), Taylor College 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.

Statement of Work/Scope of Work

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
- Youth within age of compulsory school attendance but not attended school for at least most recent complete school year calendar quarter.
- 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) and/or other community partners 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 such as RIASEC 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 assigned corresponding activities via case management, ISS planning and use of Employ Florida. The Career Coach

Statement of Work/Scope of Work

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, career pathway occupational trainings, effective job search techniques, working effectively with others, stress and time management, labor market, financial literacy,

Statement of Work/Scope of Work

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:

- **HBI PACT (Pre-Apprenticeship**
- **Certificate Training) CORE**
- **HBI PACT Carpentry**
- **GED/High School Diploma**
- **Fiber Optics Technician**
- **Other Approved local in demand Occupational Trainings as listed on the approved Targeted Occupational List**
- **Other Approved National Credential Certifications as listed on the CareerSource Florida Master Credential List**

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 are the following:

Educational Functioning Level (EFL): [Achievement of at least one educational functioning level of a participant in an educational program that provides instruction below the post-secondary level]

Attainment of high school diploma or its recognized equivalent: [Achievement of High School Diploma or General Equivalency Diploma]

Secondary or Post-secondary Transcript/Report Card: [Transcript or report card that shows a participant is achieving the state units' academic standards]

Training Milestone: [Satisfactory or better progress report, towards established milestones from an employer/training provider who provided training ex: completion of OJT, completion of one year of an apprenticeship program]

Skills Progression: [Successful passage of an exam that is required for a particular occupation, progress in training technical or occupational skills as evidenced by trade related benchmarks such as knowledge-based exams]

All forth mentioned MSG's 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:

Table Exhibit A:

WIOA Required Program Elements	Provider / Referral Agency	Instructional Activities
1. Tutoring, academic remediation; study skills training, and instruction leading to secondary school completion, including dropout prevention strategies	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.
2. Alternative secondary school offerings	Eckerd Connects /Public school partners (Marion, Citrus and Levy County School Boards Alternative Programs)	Florida Sunshine State Standards
3. Summer employment opportunities directly linked to academic and occupational learning	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
4. Paid and unpaid work experiences, including internships and job shadowing	Eckerd Connects /Community Business partners, CBO’s, FBO’s	Eckerd documented Work Experience activities
5. Occupational skills training	Approved Training Provider Partners	Various - Based on identified occupations/career fields on the Targeted Occupations List with Approved Nationally Recognized Training Providers
6. Leadership development opportunities, including such activities as positive social behavior and soft skills, decision making, teamwork, etc.	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.
7. Supportive Services	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

8. Adult mentoring for at least 12 months	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.
9. Comprehensive guidance and counseling	Eckerd Connects will refer to community agencies	Ongoing intensive case management to include additional counseling and guidance as needed
10. Follow-up services no less than 12 months after exit	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)
11. Financial Literacy	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
12. Entrepreneurial Skills Training	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.
13. Activities that help youth transition to postsecondary education and training	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.
14a. Services that provide labor market and employment information in the local area	Eckerd Connects	Eckerd will provide this information as a part of our work readiness activities in a class setting or individually within in DevelopU (O*Net)
14b. Education offered concurrently with and in the same context as workforce preparation	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; detemining 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 continue to provide follow up case management services for up to 25 young adults from the 2021 YouthBuild Grant. The contractor will continue to provide Eckerd Connects staff will continue input data into the YouthBuild GPMS (Grantee Performance Management System) system of the progress of each participant and provide additional reporting as needed the Director of Operations. Eckerd Connects will follow the YouthBuild grant and guidance of the Executive Vice President. The Contractor will provide one year of follow-up services for YouthBuild participants 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 Director 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 Director 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 Operations 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 Operations or designee within 24 hours of such vacancy. The Contractor will maintain a single point of contact with Director of Operations to ensure ongoing communication regarding contract services and performance.

Cost Allocation Plan: The Contractor will submit a cost allocation plan to the Director of Finance annually. The cost allocation plan must be signed and certified by the Contractor’s 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:

Table Exhibit B:

	<u>YouthBuild A</u>	<u>Youth</u>	<u>Adult</u>	<u>Dislocated Worker</u>	<u>TOTAL</u>
Funding Source - Award #s	<u>17.274</u>	<u>17.259</u>	<u>17.258</u>	<u>17.278</u>	
Operating w/o WEX	\$64,607	\$454,006.19	\$20,000.00	\$20,000.00	\$558,613.63
Operating WEX		\$109,434.81			\$109,434.81
Subtotal Operating	\$64,607.44	\$563,441.00	\$20,000.00	\$20,000.00	\$668,048.44
Participant w/o WEX		\$87,620			\$87,620.00
Participant WEX		\$114,939			\$114,939.00
Subtotal Participant	\$0	\$202,559			\$202,559.00
Total Contract	\$64,607.44	\$766,000.00	\$20,000.00	\$20,000.00	\$870,607.44
Total WEX as % of Allocation		29.29%			25.77%

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 10th of the month for the previous month, and invoices will be submitted by the 20th 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 Work Experience Expenditures) 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**

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, 2024, to June 30, 2025

Performance Pay Measure: Eckerd Connects will have a performance holdback of \$43,530 (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 \$43,530 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.

Table Exhibit C:

Performance Benchmark	Definition / Required Performance	Payment
Enrollments	1st Quarter- Meet 20 Enrollments by 9/30/24 2nd Quarter- Meet 20 Enrollments by 12/31/24 3rd Quarter- Meet 25 Enrollments by 3/31/25 4th Quarter- Meet 20 Enrollments by 6/30/25 <i>Eckerd Connects is eligible for enrollment payout providing all enrollments are met by 6/30/2025.</i>	\$1,595.83 per Quarter
Measurable Skills Gain	81% of OSY enrolled in a triggering education or training activity should have at least one measurable skill gain per program year.	\$1,595.83 per Quarter
Employment/ Education Retention Rate 2nd Quarter after Exit	74% of participants in education/training activities or unsubsidized employment during the 2nd quarter after exit from the program	\$1,595.83 per Quarter
Employment/ Education Retention Rate 4th Quarter after Exit	72% of participants in education/training activities or unsubsidized employment during the 4th quarter after exit from the program	\$1,595.83 per Quarter
Credential Attainment Rate	83% 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
Median Wages	\$3,365 Median Wage of Participants who average at least \$3,365 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 (*Performance Indicator Measures are subject to change based on state negotiated performance with region 10*):

- **Measurable Skills Gain**
 - 81% of OSY enrolled in a triggering education or training activity **should have at least one measurable skill gain per program year.**
- **Enrollments**
 - **1st Quarter-** Enroll 20 New Eligible Participants
 - **2nd Quarter-** Enroll 20 New Eligible Participants
 - **3rd Quarter-** Enroll 25 New Eligible Participants
 - **4th Quarter-** Enroll 20 New Eligible Participants
- **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 – 2nd Quarter After Exit**
 - **74%** of participants in education/training activities or unsubsidized employment during the 2nd quarter after exit from the program ~ **(performance indicator)**
- **Employment/Education Retention Rate – 4th Quarter After Exit**
 - **72%** 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**
 - **\$3,365 Median Wage** of Participants who average at least \$3,365 during the 2nd 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	Eckerd Connects <ul style="list-style-type: none">- Tier 1 Certification- NRF Customer Service Certification
01/2019 - Present	College of Central Florida <ul style="list-style-type: none">- BAS – Business Administration**15 credit hours needed for Healthcare Specialization Degree
01/2018 - 12/2018	College of Central Florida <ul style="list-style-type: none">- Associate in Arts – Business Administration- Microsoft Office Suite Professional Certification
08/1999 - 4/2001	Florida State University <ul style="list-style-type: none">- Progress towards AA/AS

Employment History

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

- 06/2017 - 03/2019 **Co-owner**
MJD Publishing LLC, Ocala, FL
- Accurately track business expenses using Microsoft Office Excel and QuickBooks
 - Quarterly tax filing and maintenance of company licensure and ownership of intellectual properties
 - Develop strategy for revenue generation including identifying new sole proprietor ventures, partnerships, and subcontractor relationships
- 08/2016 - 06/2017 **General Manager (GM)**
Advance Auto Parts, Summerfield, FL
- Supervise and schedule staff including full-time and part-time workers
 - Train, coach, and motivate team members
 - Develop strategy to meet quarterly financial targets
 - Grow customer satisfaction through implementation of strategic initiatives
- 05/2015 - 08/2016 **Department Manager**
Macy's, Ocala, FL
- Supervise and schedule staff including full-time and part-time workers
 - Train, coach, and motivate team members
 - Develop strategy to meet quarterly financial targets
 - Plan and evaluate execution of Customer Loyalty programs across Central Florida District.
- 05/2004 - 05/2015 **General Manager (GM)**
Starbucks, Ocala, FL
- Responsible for complete operation of multiple high-volume stores including staffing, training, inventory management, monthly sales goals, utilization of recognition programs
 - Peer mentor
 - Store manager trainer
 - Classroom facilitator
 - Supervise District during District Manager absence and vacations
 - Multi-unit management during periods of new manager selection and training
 - Project implementation specialist North Florida Region
 - Drive-Thru Speed of Service Initiative
 - Drive-Thru Lean Process Auditor
 - District Community Service Lead 2007-2010

Heaven Colón

8477 SW 103rd ST RD APT B ♦ Ocala, FL 34480 ♦ Cell: (352) 304-3000 ♦ heavencolon@gmail.com

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

KIMBERLY L. GREY

4056 N.E. 20th 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 Assurances 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

Kimberly Grey | 1 of 2

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

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

SHANNON MILLS

6225 N.E. 1st Street Ocala, FL 34470 • 352-433-7338 • 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

- | | |
|--|--------------------|
| CINS Case Manager | 2006-2010 |
| <ul style="list-style-type: none"> • 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 • 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 • Collaborate and coordinated with Department of Juvenile Justice Attorney to prepare the child in need of services petitions, predispositions studies, and judicial reviews | |
| Intake Coordinator | 2003-2006 |
| <ul style="list-style-type: none"> • Conducted Centralized Intake Screening and determine most appropriate service that will meet the needs of youth and families • Meet with families to complete necessary paperwork to start the appropriate services with the agency • Provided case management services and follow-up support • Developed Service plans | |
| Residential Direct Care Worker | 2001 – 2003 |
| <ul style="list-style-type: none"> • Provide direct supervision for youth ages 10 -17 in a residential facility | |

EDUCATION

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

CERTIFICATIONS

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

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

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

Workforce Operations Assistant

04/2016 – 09/2020

Eckerd Connects

Lecanto, FL

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

Administrative Assistant

08/2014 – 04/2016

Henkels and McCoy

Lecanto, FL

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

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

XCEL HR
Lecanto, FL

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

Michelle Sanchez
6858 NE 2nd Loop
Ocala, Florida, 34470
407-739-5317
michelle.sanchez10@aol.com

Summary

A dedicated, critical thinker, with professional problem-solving skills. Experienced in customer service with retail, young adults & supervised population. Ability to understand all tasks given on a fast-paced basis and willing to serve the given clients with efficiency. Looking for a full-time position in a new field.

Skills and Qualifications

- Proficiency with conveying, assisting, and offering problem solving solutions to co-workers and management
- Capable of active listening, comprehending nonverbal and verbal communication
- Competence of computer programs and efficiently using software related to Google Chrome and Microsoft Programs to include, Word, Excel, and Outlook
- Preparedness for daily tasks, organizing assignments with colleagues and flexibility to work in various scenarios
- Understanding to customers need and transitioning conversations to explore possibilities

Education

Dr. Phillips High School	High School Diploma	Orlando, Florida
College of Central Florida	Associate Degree	Ocala, Florida

Work Experience

Aeropostale Sales Associate	Orlando, Florida Jan 2014 - Aug 2017
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- Helped customers find their perfect wardrobe for the new season
- Answered any questions regarding the product available on the sales floor
- Assisted in customer complaints, returns and refunds

Florida Department of Corrections Correctional Officer	Ocala, Florida Aug 2019 – Jan 2021
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- Conducted locker searches for contraband items
- Assisted in supervision of inmates in a dormitory of over 100 inmates
- Practiced laws set in place for officers and inmates

Marion County Clerk of Courts Clerk	Ocala, Florida Oct 2021- Jan 2022
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- Filed documents for court proceedings
- Documented pertinent information from judicial hearings
- Case notes when court decisions were made

Work Experience(Page 2)

Crazy Cucumber LLC

Ocala, Florida
July 2021- Mar 2023

Server

- Took customer orders when they were seated in my section
- Kept track of their orders, beverages and time on food coming out to the table
- Handled situations with dissatisfaction and complaints on service and/or food

Eckerd Connects

Ocala, Florida
Mar 2023 – Present

Career Coach

- Assisting young adults to further develop their education
- Educating them in the workplace on what employers expect through training provided
- Organize a schedule for them to come into office to work on obtaining certifications throughout the program

Amy brown

Old Town, FL
brown091717@gmail.com
+1 717 797 7088

Work Experience

Workforce career Coach

Eckerd Connects
August 2023 to Present

I am a career coach for 16-24 year old young adults. I help them find jobs and work with them with their basic skills. I help them with their resumes and if need education.

Office Manager and parts counter

Wd parts and repair-Gordonville, PA
September 2020 to February 2023

I do pay roll I am the he department.. I run the shop.. I run the parts room .. I do accounts payable and receivable

Office Manager

Wd dump truck service-Gordonville, PA
March 2020 to February 2023

I do the books for the company. I also do payroll and he.. I do account receivable and accounts payable

Receptionist and warranty administrator

Keim chevrolet-Paradise, PA
October 2018 to March 2020

Answer phones. I check out all the customers.. I do all the warranty stuff like sending them in making sure everything is right.. I file and other office duties

Caretaker

Caring Matters Home Care-Lancaster, PA
March 2016 to June 2017

Helped people with down syndrome with their daily routines.. took them shopping . and helped them be able to do normal daily things. Helped with showers and cleaning homes

Resident Care Aide

Sunny Crest Home, Inc.-Morgantown, PA
September 2015 to March 2016

Education

High school or equivalent

Palcs

2009

Skills

- Microsoft Office (5 years)
 - Computer Skills (10+ years)
 - Filing (3 years)
 - Organizational Skills (5 years)
 - Phones (10+ years)
 - Office Experience (2 years)
 - Money Handling (10+ years)
 - Warranty (2 years)
 - Excel (3 years)
 - Data Entry (3 years)
 - Scheduling (1 year)
 - Multi-line Phone Systems (4 years)
 - QuickBooks
 - Accounts Payable
 - Office Management
 - Microsoft Outlook
 - Accounts Receivable
 - Pharmacy Technician Experience
 - Management
 - Accounting
 - Residential Cleaning
 - Personal Assistant Experience
 - Animal Care
 - Financial Report Writing
 - Payroll
-

Heather Lynn Cox
15 Dogwood DR
Ocala, FL 34472
352-554-0544
Heatherlcx2017@gmail.com

Objective

To assist others in the attainment of their personal and professional goals through individual and group involvement, encouragement, and care

Skills

- Writing
- Reading Comprehension
- Active Listening
- Computer Usage
- Determination

Experience

October 2023 - Present Ocala, FL
Workforce Career Coach Eckerd Connects Workforce Development

- Point of contact for young adults within the YouthBuild program
- Maintains requirements for participants eligibility and coordinating activities for successful completion of the YouthBuild program
- Assists with basic remedial skills in both math and reading, as well as work readiness skills
- Utilization of Employ Florida and ATLAS computer programs to perform necessary duties established for the YouthBuild grant

June 2022 - October 2023 Ocala, FL
Personal Trainer Planet Fitness

- Responsible for the training and development of clients seeking improvement in their physical fitness and overall, well being
- Used tracking systems to monitor and manage progress of clients' goals, physical activities and meals
- Maintained "Top- Rated" Personal Trainer status among Central Florida Planet Fitness locations for six months consecutively

April 2013 - April 2018 Ocala, FL
Receptionist/Cashier Sullivan GMC

- Managed the operation of the company's multi-line phone system, greeted guests, and performed basic cashiering duties to check out client services
- Maintained inventory through data entry systems for new and used vehicles and performed other administrative duties as assigned

Education & Certifications

General Education Development, 1998
Personal Trainer ISSA, 2022



Workforce Development

Job Description

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

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

- 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.SM



Job Description

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

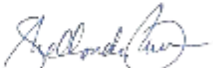
- A. Internal:
Eckerd Operations and Support Center Staff
- B. External
Government Officials
Representatives of Regulatory Agencies
Participants
Members of the Media
Current and Potential Contributors to the Organization
The Public at Large
Federal, state and local governmental agencies
Industry groups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



Job Description

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

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

The first name in second chances.™



**Workforce
Development**

Job Description

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

Mantor

Success



Job Description

Job Code:	01200003	Job Title:	VP, Operations
Pay Grade:	25	EEO:	
Status:	Exempt	Division:	All
Program/Dept(s):	Operations	Location(s):	Multiple
Reports to:	Chief of Programs & Strategy	Supervises:	Operations Director(s) and Program Manager(s)
Relationships (Internal):	All levels of employees within the organization	<ul style="list-style-type: none"> • Directly • Indirectly 	All assigned operations supervisors and staff
		Relationships (External):	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
Effective:	July, 2017	Supersedes:	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 _____ *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* _____

Vice President, Operations



Workforce Development

Job Description

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



Job Description

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

- A. Education – Related Bachelor’s Degree from an accredited College or University preferred.
- B. Experience – 2+ years relevant work experience hiring, training, and managing staff. Past experience working with the targeted population.
- C. 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.
- 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. Travel up to 40% of the time.
- F. Travel - Must be able to meet requirements for Eckerd’s Auto Insurance and be able to drive for business purposes.



Job Description

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

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.

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*

initials

Workforce Retention Specialist

2 of 2

EXHIBIT VI – Salary Structure

Eckerd Connects

Staff Job Titles and Salary Hourly Ranges (updated for PY24 7-1-2024- 6-30-2025)

Code	Description-English (US)	Paygrade	FLSA	W/C	Job Class	EEO	Range Rates			Auto Ins Positions
							Minimum	Midpoint	Maximum	
1300028	Operations Director	S10021	E	8810	MG	1	\$66,641.40	\$83,301.75	\$99,962.10	Yes
2300033	Program Manager	S10017	E	8810	MG	2	\$43,882.65	\$54,853.05	\$65,823.45	Yes
2300045	Site Manager	S10016	E	8810	PR	2	\$39,087.30	\$48,859.65	\$58,632.00	
1200018	Sr VP, Workforce Operations	S10029	E	8810	SM	A	\$153,577.79	\$191,971.84	\$230,365.89	
2000142	Workforce Career Coach	H20015	N	8868	PR	2	\$16.93	\$21.16	\$25.39	
2000143	Workforce Development Specialist	H20015	N	8868	PR	2	\$16.93	\$21.16	\$25.39	No
2000145	Workforce Retention Specialist	H20014	N	8868	PR	2	\$15.39	\$19.24	\$23.09	No
8000001	YouthBuild Construction Instructor	H20015	N	8868	IN	8	\$16.93	\$21.16	\$25.39	

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: scrawford@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

CAREERSOURCE CONTRACT AGREEMENT NUMBER		
GRANTEE OF ADDITIONAL FUNDING (Name/Address):		
ADDITIONAL FUNDING APPROVAL DATE:		
FUNDING/EXPENDITURE INFORMATION		
a. Funding/Grant Amount	\$	
b. Funds Received to Date	\$	
Funds Allocated in the Following Manner:		
c.	\$	
d.	\$	
e.	\$	
f.	\$	
g.	\$	
<p style="text-align: center;"><u>SIGNATURE OF PERSON AUTHORIZED IN AGREEMENT</u></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: Youthbuild
- Subrecipient: Eckerd Connects
- DUNS number: 080681158
- Federal Award Identification Number: YB-38216-22-60-A-12
- Federal Award Date: 5/1/2022
- Sub-award Performance Period: 7/1/2023 – 06/30/2024
- Federal Funds Obligated: \$64,607.44
- Funds Obligated to Sub-recipient: \$64,607.44
- Federal Award Amount: \$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
- 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 15.75%
- Sub-recipient Indirect Cost Rate: 14.10% Provisional rate

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

EXHIBIT X
Authorization to Incur Travel
Program Year 2024-2025
Eckerd Youth Alternatives

STAFF NAME	POSITION/TITLE	TRAVEL ESTIMATE
Kimberly Grey	Operations Director	140 (\$63.00)
Heaven Colon	Program Manager	1,500 (\$675.00)
Shannon Mills	Site Manager	1,500 (\$675.00)
Edward Deskovic	Workforce Development Specialist	2,000 (\$900.00)
Brittney Fish	Workforce Career Coach	300 (\$135.00)
Heather Cox	Workforce Career Coach	300 (\$135.00)
Michelle Sanchez	Workforce Career Coach	300 (\$135.00)
Talia Kong-quee	Retention Specialist	1,150 (\$517.50)
Amy Brown	Workforce Career Coach	1,150 (\$517.50)
Victoria Wilson-Reich	Workforce Career Coach (Exempt/Non Driver)	0
	Total Mileage for All Staff:	8,340 (\$3,753.00)

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

N/A

(See list of board members attached)

There is (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 (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: 7-5-24

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

Carl D. Flanagan

Randall W. Luecke

Typed/Printed Name of Signee

Typed/Printed Name of Signee

Board Chair

CFO

Title

Title

Date

Date

7/8/24

7-5-24

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



CONTRACT/AGREEMENT MODIFICATION

A. Employer/Service Provider/Contractor Name: Southern Indiana Works	C. Contract/Agreement No.: PY23-LOA-09 D. Modification No: 1 E. Type of Contract: Local Office Agreement
B. Address: 2125 State St. Suite 16 New Albany, IN 47150	F. CareerSource Citrus Levy Marion 3003 SW College Road Suite 205 Ocala, FL 34474

G. Funding Changes:

Increase
 Decrease
 from: \$ _____ to \$ _____

 Unchanged

H. In consideration of the contract/agreement and representation contained herein, the parties agree that the above numbered contract/agreement is modified as follows:

On 06/07/2023, the CareerSource Citrus Levy Marion board of directors authorized a contract with Southern Indiana Works. This contract is renewable for a period of three additional program years with the final contract renewal ending June 30, 2027. This contract may be renewed annually at the discretion of CSCLM and Southern Indiana Works.

This modification changes the end date of the original contract to June 30, 2025. All contracts are reviewed annually. All terms and conditions shall remain the same unless a change is agreed upon by both parties.



Attachments:
 -Scope of Work for program year 2024-2025
 -W-9 Form
 -Contractor Disclosure

Contract PY23-LOA-09 is supported by the Employment and Training Administration of the U.S. Department of Labor as part of an award totaling \$8,200,000.00 with no percentage financed from non-governmental sources.

Occupation Title /DOT Code/SVP Code	Initial Wage/Hour	Hourly Cost Factor Reimbursement (%)	Hours of Training	Trainee Cost
Title: DOT Code: SVP Code:				Wages: Educ: Total:

I. This modification is effective on 7/1/2024 or the date on which the modification has been signed by both parties, whichever is later. Except as hereby modified, all terms and conditions of said contract /agreement remain unchanged in full force and effect.

J. The parties hereto have duly executed this Modification and in signing and dating same, thereby validating this modification. The parties also certify that each possesses legal authority to contract and bind their respective organizations in their capacity as a signatory official.

<p>Approved for Employer/Provider/Contractor:</p> <p>By: <u></u> Signature <u>Anthony A Waterson</u> Typed/Printed Name <u>6/27/24</u> Date</p>	<p>Approved for CareerSource Citrus Levy Marion</p> <p>By: <u></u> Sigr <u>Thomas R. Skinner</u> Typed/Printed Name <u>6/27/24</u> Date</p> <p style="text-align: right;"> Rusty Skinner 2024.06.28 08:20:14 -04'00' </p>
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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 at least three business days in advance. Additionally, program information may be made available in Spanish upon request. A proud partner of the American Job Center Network.

Attachment A
Scope of Work PY24

- **Quarter 1:**
 - Finalize MOUs and update tracking to prepare for next renewals
 - Meet with select partners in person during on-site visit
 - Target representation from Levy County
 - Visit all 3 career centers
 - Participation virtually in Board committee meetings as requested by CSCLM leadership
 - Research best practices in staff training programs
- **Quarter 2:**
 - Meet with select partners in person during on-site visit
 - Participation virtually in Board committee meetings as requested by CSCLM leadership
 - Connect with mandatory MOU partners for regular check-in
 - Identify areas for best practices research or training in partnership with CSCLM leadership
- **Quarter 3:**
 - Identify MOU renewals needed, draft, and share new MOUs with partners
 - Meet with select partners in person during on-site visit
 - Visit all 3 career centers
 - Participation virtually in Board committee meetings as requested by CSCLM leadership
 - Identify areas for best practices research or training in partnership with CSCLM leadership
- **Quarter 4:**
 - Meet with select partners in person during on-site visit
 - Participation virtually in Board committee meetings as requested by CSCLM leadership
 - Identify areas for best practices research or training in partnership with CSCLM leadership
 - Conduct updated staff survey on partnerships to reassess engagement needs

The Southern Indiana Works team will have monthly check-in meetings with CSCLM leadership to provide and receive updates throughout the year. We will work with CSCLM leadership to determine any presentations necessary for Board or committee meetings and requests for trainings or additional engagement with staff. We will revisit the scope of work throughout the year if necessary, based on the request of CSCLM leadership.



CONTRACTOR DISCLOSURE AND CERTIFICATION

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

and Southern Indiana Works (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.

6/27/2024

Date Filed

Signature of Authorized Representative

Anthony A. Waterson

Printed Name

President & CEO

Title

Request for Taxpayer Identification Number and Certification

Go to www.irs.gov/FormW9 for instructions and the latest information.

**Give form to the
requester. Do not
send to the IRS.**

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.	1	Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)			
	Region 10 Workforce Board d/b/a Southern Indiana Works				
	2	Business name/disregarded entity name, if different from above.			
	Southern Indiana Works				
	3a	Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes.			
	<input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. <input checked="" type="checkbox"/> Other (see instructions) non-profit				
	4	Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):			
Exempt payee code (if any) <u>1</u>					
Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any)					
3b	If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions <input type="checkbox"/>				
5		Address (number, street, and apt. or suite no.). See instructions.			
2125 State Street; suit 16		Requester's name and address (optional)			
6				City, state, and ZIP code	
New Albany, IN, 47150					
7 List account number(s) here (optional)					

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
or									
Employer identification number									
2	0	-	4	9	8	1	0	6	8

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person	Date	6/28/2024
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).



RECORD OF ACTION/APPROVAL

Board Meeting

Wednesday, June 5, 2024

TOPIC/ISSUE:

One Stop Operator Contract

BACKGROUND:

Southern Indiana Works was procured as our One Stop Operator with their first year of performance occurring this past program year.

POINTS OF CONSIDERATION:

Southern Indiana Works has been instrumental with partner relations and engagement and has met all performance benchmarks. The current contract may be renewed up to three additional years before re-procurement must occur.

The total contract cost remains the same as this program year at a total of \$75,000.00.

STAFF RECOMMENDATIONS:

Renew the One Stop Operator contract with Southern Indiana Works effective July 1, 2024.

COMMITTEE ACTION:

BOARD ACTION:

Charles Harris made a motion to approve the One Stop Operator Contract. Carl Flanagan seconded the motion. Motion carried.



CONTRACT/AGREEMENT MODIFICATION

A. Employer/Service Provider/Contractor Name: Underwood Sloan and Associates	C. Contract/Agreement No.: PY23-LOA-10 D. Modification No: 1 E. Type of Contract: Independent Monitoring
B. Address: 77 Ponderosa Drive Crawfordville, FL 32327	F. CareerSource Citrus Levy Marion 3003 SW College Road Suite 205 Ocala, FL 34474

G. Funding Changes:

Increase
 Decrease
 from: \$ _____ to \$ _____
 Unchanged

H. In consideration of the contract/agreement and representation contained herein, the parties agree that the above numbered contract/agreement is modified as follows:

On 7/1/2023, the CareerSource Citrus Levy Marion board of directors authorized a contract with Underwood Sloan and Associates. This contract is renewable for a period of three additional program years with the final contract renewal ending June 30, 2027. This contract may be renewed annually at the discretion of CSCLM and Underwood and Sloan Associates.

This modification changes the end date of the original contract to June 30, 2025. All contracts are reviewed annually. All terms and conditions shall remain the same unless a change is agreed upon by both parties. All associated fees and payments made under this agreement are on a 'not to exceed' basis with a max cap of \$50,000.00 annually for services rendered.

Attachments:
 W-9
 Contractor Disclosure and Certification
 Pay Table

Contract PY23-LOA-10 is supported by the Employment and Training Administration of the U.S. Department of Labor as part of an award totaling \$8,200,000.00 with no percentage financed from non-governmental sources.

Occupation Title /DOT Code/SVP Code	Initial Wage/Hour	Hourly Cost Factor Reimbursement (%)	Hours of Training	Trainee Cost
Title:				Wages:
DOT Code:				Educ:
SVP Code:				Total:

I. This modification is effective on July 1, 2024 or the date on which the modification has been signed by both parties, whichever is later. Except as hereby modified, all terms and conditions of said contract /agreement remain unchanged in full force and effect.

J. The parties hereto have duly executed this Modification and in signing and dating same, thereby validating this modification. The parties also certify that each possesses legal authority to contract and bind their respective organizations in their capacity as a signatory official.

<p>Approved for Employer/Provider/Contractor:</p> <p style="text-align: center;">Calvin E. Sloan,</p> <p>By: <u>Jr.</u> Digitally signed by Calvin E. Sloan, Jr. Date: 2024.05.28 16:25:01 -04'00'</p> <p>Signature _____</p> <p style="text-align: center;">CALVIN SLOAN</p> <p>Typed/Printed Name _____</p> <p style="text-align: center;">MAY 28, 2024</p> <p>Date _____</p>	<p>Approved for CareerSource Citrus Levy Marion</p> <p style="text-align: center;"><i>[Signature]</i></p> <p>By: _____</p> <p>Signature _____</p> <p style="text-align: center;">Thomas E Skinner, Jr.</p> <p>Typed/Printed Name _____</p> <p style="text-align: center;"><u>6/4/2024</u></p> <p>Date _____</p>
---	--

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. UNDERWOOD SLOAN AND ASSOCIATES, LLC	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.	
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate	
	<input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ <u> P </u> Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.	
	<input type="checkbox"/> Other (see instructions) ▶	
	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>	
5 Address (number, street, and apt. or suite no.) See instructions. 77 PONDEROSA DRIVE		
6 City, state, and ZIP code CRAWFORDVILLE, FL 32327-1251		
7 List account number(s) here (optional)		
Requester's name and address (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number	
[] [] [] []	- [] [] - [] [] [] [] [] []
OR	
Employer identification number	
8	3
-	4
2	9
8	3
2	0

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶ Calvin E. Sloan, Jr.	Digitally signed by Calvin E. Sloan, Jr. Date: 2024.05.28 16:25:41 -04'00'	Date ▶ MAY 28, 2024

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



CONTRACTOR DISCLOSURE AND CERTIFICATION

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

and UNDERWOOD SLOAN AND ASSOCIATES, LLC (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.

 MAY 28, 2024
Date Filed

Calvin E. Sloan, Jr. Digitally signed by Calvin E. Sloan, Jr. Date: 2024.05.28 16:26:14 -04'00'

Signature of Authorized Representative

 CALVIN SLOAN

Printed Name

 PARTNER

Title

Attachment B- Pay Table

Agreement # PY23-LOA-10

July 1, 2024-June 30, 2025 Monitoring Budget Table

Total Annual Budget- \$50,000.00

Programmatic Monitoring Activities Payable Upon Completion:

- WIOA-AD/DW/Youth- \$4,400.00
- Welfare Transition (WTP)/SNAP- \$4,400.00
- Wagner Peyser (WP)- \$4,400.00
- Trade Adjustment Assistance (TAA)- \$4,400.00
- Veterans- \$4,400.00
- RESEA- \$4,400.00
- Administration, Board and Finance - \$4,400.00

Report Preparation and Staff Consultation Benchmarks Payable Upon Completion:

- Draft Programmatic Report WIOA AD, DW, Youth/WTP/SNAP- \$4,400.00
- Draft Programmatic Report WP/TAA/Veterans/RESEA - \$4,400.00
- Draft Administration, Board and Finance Report - \$4,800.00
- Final Annual Report and Board Presentation - \$5,600.00



RECORD OF ACTION/APPROVAL

**Board Meeting
Wednesday, March 20, 2024**

TOPIC/ISSUE:

Approval of 2024-2025 contracts

BACKGROUND:

POINTS OF CONSIDERATION:

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

STAFF RECOMMENDATIONS:

COMMITTEE ACTION:

BOARD ACTION:

Master Contracts Requiring 2/3rds Vote

1. Citrus County Chamber of Commerce
2. Ocala Metro Chamber & Economic Partnership (CEP)
3. Levy County Schools
4. College of Central Florida
5. Marion County School Board

Theresa Flick made a motion to approve contracts for Citrus County of Chamber of Commerce, Ocala Metro Chamber & Economic Partnership (CEP), Levy County Schools, College of Central Florida, and Marion County School Board. Carl Flanagan, Kevin Cunningham, Chris Cowart, Mark Paugh, and Ben Whitehouse abstained due to a conflict. Members that previously declared a conflict but are not present are John Murphy and Kevin Sheilley. Deb Stanley seconded the motion. Motion carried.

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

6. Ancorp
7. Key Training Center
8. A & M Manufacturing

9. Ocala Housing Authority
10. Citrus County Schools

Carl Flanagan made a motion to approve contracts for Ancorp, Key Training Center, A&M Manufacturing, Ocala Housing Authority, and Citrus County Schools. Arno Proctor, Theresa Flick, John Hemken, and Deb Stanley abstained due to a conflict. Angela Juaristic previously declared a conflict but is not present. Kevin Cunningham seconded the motion. Motion carried.

Contracts Not Requiring 2/3rds Vote – No Conflicts

11. Nature Coast Business Development Council
12. Powell and Jones – Joint Auditing
13. Powell and Jones – Subrecipient Monitoring
14. CD Staffing
15. Region 6 Financial Services Agreement
16. Underwood and Sloan
17. Quality Labor Management

Kevin Cunningham made a motion to approve all other contracts. Theresa Flick seconded the motion. Motion carried.

COMMERCIAL LEASE

This lease dated 1/1/2024, by and between, DTW Lecanto LLC, (herein referred to as “Lessor”) and CareerSource Citrus Levy Marion, hereinafter referred to as “Lessee”.

WITNESSETH:

That, in consideration of the mutual covenants and agreements herein contained, Lessor has demised and leased, and by these presents does demise and lease to Lessee, for the rental, for the term and upon the other conditions hereinafter set forth, certain premises consisting of:

The property known as 683/687/691 S Adolph Point, consisting of approximately 3,805 square feet, together with the fixtures and appurtenances located therein, and the parking areas and access ways as presently designated (hereinafter referred to as “Premises”).

1. Term – The term of this lease shall be for a 1-year period, beginning January 1st, 2024 and ending on December 31, 2024.
2. Renewal Option – Lessee shall have an exclusive option to renew for 1-5 additional years, provided that Lessee shall serve upon Lessor written notice of its intent to renew 75 days prior to the expiration of the initial term, on the same terms set forth herein, with the exception that the annual rental rate shall be adjusted. The rate for the renewal shall be provided by the Lessor at the time of the request and shall be accepted or rejected by the Lessee 60 days prior to the expiration of the initial term.
3. Rent – As rent for the premises, and all rights granted herein, Lessee shall pay Lessor monthly a rent of Five Thousand Five Hundred dollars (\$5,500.00), Payable in advance on the first day of the month. **The rate includes all CAM or operating expenses as this is a gross lease structure.** Unless and until otherwise directed in writing by Lessor, all payments shall be made and payable to: DTW Lecanto LLC.
4. Quiet Enjoyment – Lessor shall put Lessee in possession of the premises at the beginning of the term hereof, and Lessee, upon payment of the rent and observing the other covenants and conditions herein upon its part to be observed, shall peaceably and quietly hold and enjoy the premises.
5. Maintenance and repairs – Lessee shall, at all times during the term hereof, and at its own cost and expense, maintain in good, safe and substantial order and condition, all buildings and improvements on the premises, including sole responsibility for replacement with the same kind and quality of any and all broken fixtures which cease to function during Lessee’s occupancy, ordinary use and wear, damage by accidental fire or unavoidable casualty only excepted; and to keep and maintain in good order and condition all glass in the leased premises, and in the event of damage thereto, replace with glass of equal quality. Landlord shall warrant and keep all interior mechanical systems in good condition for the term of this lease.
6. Utilities and miscellaneous operational items – Lessee shall procure and pay for its own electric, water, telephone, and the like and shall hold Lessor harmless from any damage or failure to pay.

7. Fixtures – All fixtures on the premises as of the execution of this lease are the property of the Lessor and shall be maintained and repaired in the manner provided for in the “maintenance and repairs” section, above. Lessee shall notify Lessor prior to placing on the premises any additional equipment or fixtures added by Lessee, and Lessee shall obtain from Lessor permission, in writing, prior to installing any fixtures that cannot be removed without damage to the premises. Any fixtures or equipment installed by Lessee shall be installed and maintained at Lessee’s expense.
8. Alterations – Lessee shall not make any alterations to the premises unless approved, in writing, by the Lessor. Approval may be withheld for any reason.
9. Advertising – 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.
10. Use of the premises – In its use of the premises, Lessee shall comply with all statutes, ordinances and regulations applicable to the use thereof, including without limiting the generality of the foregoing, the zoning ordinances of Citrus County, Florida, and all requirements of the Occupational Safety and Health Administration, if applicable. Lessee shall not injure or deface the premises nor occupy or use, nor permit or suffer the premises or any part thereof to be occupied or used for any unlawful or illegal business, use or purpose, nor for any business, use or purpose which is extra-hazardous, nor in such a manner as to constitute a nuisance of any kind. Lessee shall procure, pay for and maintain any licenses or permits required by any use by Lessee of the premises. Lessee will use the leased premises for no purpose other than as an Office.
11. Liability – Except for injury or damage caused by the willful acts of the Landlord, Lessor shall not be liable to Lessee for any injury or harm to any person occurring in or on the premises or for any injury or damage to the premises or to any property of the Lessee or to any property of any third person, firm, association, trust or corporation in or on the premises, except for injury or damage as aforesaid, and Lessee shall indemnify and save Lessor harmless from and against any and all suites, claims, and demands of any kind or nature, by and on behalf of any person, firm, association, trust or corporation arising out of or based upon any incident, occurrence, injury or damage which shall or may happen in or on the premises and from and against any matter or thing growing out of the condition, maintenance, repair, alteration, use, occupation or operation of the premises, for the installation of any property therein or the removal of any property therefrom.
12. Liability Insurance – Lessee will maintain at its own cost and expense, comprehensive public liability insurance coverage in a sum of not less than One Million Dollars (\$1,000,000.00) with respect to death or injury to one or more persons, and in case of loss, destruction or damage to property shall be written on an “occurrence” basis. Such insurance policies shall be verified by “Certificate of Insurance” on request and shall insure both Lessor and Lessee as their interests may appear and shall provide that they may not be cancelled or amended with ten (10) days written notice to the Lessor.
13. Casualty Insurance – Lessor shall procure such insurance for the premises as it, in its sole discretion, as necessary, advisable or prudent. To the extent permitted without prejudice to any rights of the Lessee under the applicable insurance policies, Lessor shall be held free

and harmless from liability for loss or damage to personal property of Lessee in the premises by fire, the extended coverage perils, vandalism and malicious mischief if and to the extent actually insured against, whether or not such loss or damage be the result of the negligence of Lessor, his employees or agents.

14. Destruction or damage – In the event that the premises shall be destroyed by fire or other casualty and such destruction is not in any way due to any act, omission or negligence of Lessee, this lease shall automatically terminate without further act of either party hereto, except that Lessee shall be liable for and shall promptly pay to Lessor any rent then in arrears. If only a portion of the premises be so damaged, which damage is such that the premises remain suitable for the intended use by the Lessee, this lease shall remain in effect, although there shall be an abatement of the rent, in proportion to the space rendered unusable.
15. Access to premises – Lessor or its representative shall have free access to the premises at reasonable intervals during normal business hours for the purpose of inspection, for the purpose of showing the premises to prospective purchasers or tenants or for the purpose of making repairs which Lessee may be obligated to make hereunder but has failed or refused to make. The preceding sentence does not impose upon Lessor any additional obligations to make repairs not otherwise provided for herein.
16. Assignment/Sublease – Lessee shall not, without the prior written consent of Lessor, assign this lease or sublease the premises in whole or part.
17. Mechanics Lien – In the event that the filing in the Citrus County Registry of Deeds of any notice of a builder's, supplier's or mechanic's lien on the premises arising out of any work performed by or on behalf of the Lessee, Lessee shall cause without delay proper proceedings to be instituted to test the validity of the lien claimed, and before the end of the term to discharge the same by posting of bond or otherwise; and during the pendency of such proceeding such lien claimed, and before the end of the term to discharge the same by posting of bond or otherwise; and during the pendency of such proceeding such lien may continue until disposition of such proceeding, and after disposition thereof Lessee shall cause said lien to be released and discharged.
18. Holding Over – In the event Lessee shall hold over after the expiration of the term hereof, such holding over shall not extend the term of this lease but shall create a month to month tenancy upon all the terms and conditions of this lease.
19. Notices – Any written notice, request or demand required or permitted by this lease shall, until either party shall notify the other in writing of a different address, be properly given if sent by certified or registered first-class mail, postage prepaid, and addressed as follows:

Lessor: DTW Lecanto LLC
711 S Adolph Point
Lecanto, FL 34461

Lessee: CareerSource Citrus Levy Marion
683 S Adolph Point
Lecanto, FL 34461

20. Succession – This lease shall be binding upon and inure to the benefit of the heirs, executors, administrators, successors and assigns of the parties hereto.
21. Waiver – Any consent, express or implied, by Lessor to any breach by Lessee of any covenant or condition of this lease shall not constitute a waiver by the Lessor of any prior or succeeding breach by Lessee of the same or any other covenant or condition of this lease. Acceptance by Lessor of rent or other payment with knowledge of a breach or default by Lessee under any term hereof shall not constitute a waiver by Lessor of such breach or default.
22. Governing Law – This lease shall be construed and interpreted in accordance with the laws of the State of Florida.
23. Force Majeure – Except as expressly provided herein, there shall be no abatement, diminution or reduction of the rent or any other charges payable by Lessee hereunder based upon, or claimed as a result of, any act of God, act of the enemy, governmental action, or other casualty, cause of happening beyond the control of the parties hereto.
24. Default – If the Lessee shall neglect or fail to perform any of the covenants and agreements in this lease and on its part to be performed, and such default continues for a period of more than thirty days, after written notice thereof has been given to the Lessee specifying the particular default complained of (notice shall not be necessary if such default is in the payment of rent), and such default is not cured within such a period, or if the Lessee shall be declared insolvent, or shall be adjudicated a bankrupt, or shall assign for the benefit of creditors, or shall attempt to reorganize or compromise its debts under any section of the United States Bankruptcy Code, or if the premises shall be taken on execution, the Lessor may immediately, or any time thereafter, and without demand or notice, enter into and upon said premises and serve notice upon the Lessee to quit, whereupon this lease shall absolutely terminate and it shall be not defense to the Lessee that previous violations of any covenant have been waived by the Lessor, either expressly or by implication. Lessee agrees to pay the cost of collection and ten per cent attorney's fee on any part of said rental that may be collected by suit or by attorney, after the same is past due.

NO SMOKING POLICY. Tenant, or Tenant's family or guests shall not smoke within premises. This includes smoking cigarettes, cigars, pipes or any other smoking device. This policy is in effect desire to mitigate (i) the irritation and known health effects of secondhand smoke; (ii) the increased maintenance, cleaning, and redecorating costs from smoking; and (iii) the increased risk of fire from smoking. Tenant acknowledges that Landlord/Agent's adoption of a no smoking policy does not make the Landlord/Agent the guarantor of the Tenant's health or of the smoke-free condition of the premises.

Loitering Prohibited. Tenant and Tenant's employees and agents, clients and customers, shall not loiter in or on the entrances, corridors, sidewalks, lobbies, halls, stairways, elevators, or common areas for the purpose of smoking tobacco products or for any other purpose. Tenant and Tenant's employees and agents, clients and customers, shall not obstruct these areas but use them only as a means of ingress to and egress from the Premises. Such violation shall result in immediate termination of this lease by Lessor.

Dated: 12/14/2023

IN WITNESS WHEREOF, the parties hereto have hereunto set their hands and seals the day and year first above written:

Signed, Sealed and Delivered in the presence of:

LESSOR: DTW Lecanto LLC
By Bruce R. B. R.

Witness #1
Joanna Raga

Witness #2
Kelly Kist

LESSEE: CareerSource Citrus Levy Marion
By: M. Smith

Witness #1
Celia Smith

Witness #2
Cindy