



Circle Square Cultural Center  
8395 SW 80th St.  
Ocala, FL 34481

**BUSINESS AND ECONOMIC DEVELOPMENT COMMITTEE AGENDA**  
**Wednesday, November 6, 2024 – 9:00 a.m.**

Call to Order P. Beasley  
Roll Call C. Schnettler  
Approval of Minutes, August 14, 2024 Pages 2 - 5 P. Beasley

**DISCUSSION ITEMS**

State Update R. Skinner  
Workforce Issues that are Important to Our Community R. Skinner  
Business Services Update C. Weaver  
Revised OJT and ITA Forms Pages 6 - 25 C. Weaver  
Survey Results Pages 26 - 34 C. Weaver

**PUBLIC COMMENT**

**ACTION ITEMS**

None

**PROJECT UPDATES**

Economic Development Partner Reports  
Citrus S. Baham  
Levy S. Osteen  
Marion K. Sheilley/ H. Shubirg  
MRMA Pages 35 - 36 J. McKee  
Talent Center Page 37 C. Weaver  
Experiential Learning Page 38 C. Weaver  
Metrix Users Report Page 39 C. Weaver  
Grant Updates Page 40 C. Weaver  
Event Report Page 41 C. Weaver  
Contracts Reporting Page 22 C. Weaver

**MATTERS FROM THE FLOOR**

**ADJOURNMENT**

2024 – 2025 MEETING SCHEDULE							
Performance/ Monitoring	Business and Economic Development	Marketing / Outreach	Career Center	Education and Industry Consortium	Executive	Full Board	
Tuesday 9:00 am	Wednesday 9:00 am	Wednesday 9:00 am	Thursday 9:30 am	Thursday 9:00 am	Wednesday 9:30 am	Wednesday, 11:30 am	
8/13/2024	8/14/2024	8/21/2024	8/15/2024	8/29/2024	8/28/2024	9/4/2024	CF Levy
11/12/2024	11/6/2024	11/13/2024	11/7/2024	11/14/2024	11/20/2024	12/11/2024	CF Ocala
2/4/2025	2/5/2025	2/12/2025	2/20/2025	2/6/2025	2/26/2025	3/12/2025	CF Lecanto
5/6/2025	5/7/2025	5/14/2025	5/15/2025	5/8/2025	5/28/2025	6/4/2025	CF Ocala

**OUR VISION STATEMENT**

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



**CAREERSOURCE CITRUS LEVY MARION  
Business and Economic Development Committee**

**MINUTES**

DATE: August 14, 2024  
PLACE: CareerSource CLM  
2703 NE 14<sup>th</sup> Street, Ocala, FL 34470  
TIME: 9:00 a.m.

**MEMBERS PRESENT**

Ben Whitehouse  
Deb Stanley  
Gary Smallridge  
Jeff Chang  
Kevin Cunningham  
Mark Paugh  
Pete Beasley, Chair  
Scott Osteen

**MEMBERS ABSENT**

Chris Cowart  
John Hemken  
Judy Mckee  
Kevin Sheilley  
Phillip Geist

**OTHER ATTENDEES**

Rusty Skinner, CSCLM  
Dale French, CSCLM  
Cory Weaver, CSCLM  
Melissa Saco, CSCLM

Sandra Crawford, CSCLM  
Cira Schnettler, CSCLM  
Heather Shubirg, Ocala CEP

**CALL TO ORDER**

The meeting was called to order by Pete Beasley, Chair, at 9:00 a.m.

**ROLL CALL**

Cira Schnettler called roll and a quorum was declared present.

**APPROVAL OF MINUTES**

Kevin Cunningham made a motion to approve the minutes from the May 8, 2024, meeting. Deb Stanley seconded the motion. Motion carried.

**DISCUSSION ITEMS**

State Update

Rusty Skinner updated the committee on the following items:

- The draft of the Subgrantee agreement will be on the September board agenda for approval. This will ensure submission on the State's timeline.
- A draft agreement for regional planning is in development for State review and approval.

- State law requires at least 50% of adult and dislocated funding be used every program year. In the past our region has routinely sought a waiver. Despite efforts to educate businesses on the benefits of utilizing our Custom Business Training programs and On-the-Job Training programs there continues to be a lack of interest. We will be looking to other regions that have successfully engaged businesses in their programs for guidance. Recommendations for how we move forward will be brought to the next board meeting.

#### Workforce Issues that are Important to Our Community

- Kevin Cunningham asked if the new Citrus County economic development director has been approached about joining the board. Rusty Skinner stated that he has been invited and is awaiting a response.
- Deb Stanley was happy to report that the Citrus County School District was awarded a 2-million-dollar grant for welding programs in all three high schools in the county. She also shared that an application has been submitted for a grant that would upgrade the culinary kitchens in all three high schools to commercial kitchens.

#### WIOA Plan

Cory Weaver explained that the local workforce plan is updated every 4 years with a 2-year modification window. The current plan ends December 31, 2024. The new plan will be in effect January 1, 2025, through December 31, 2028. The Plan will be presented at the September board meeting and is due October 2 to the State.

#### **PUBLIC COMMENT**

None

#### **ACTION ITEMS**

None

#### **PROJECT UPDATES**

##### Economic Development Partner Reports

Citrus:

- There were no updates.

Levy:

- Scott Osteen shared that the below item:
  - He invited the committee members to attend the State of the County dinner being held on September 12 at 6 pm.

Marion

- Heather Shubirg shared that there are several projects in development.
  - Two projects expected to launch in the Fall will provide 1,000 jobs. She invited members to attend the Rural Summit in November as well as a professional development training that will occur during the same week as the Summit.
  - She shared that the staff of the CEP would work with us to engage businesses with on the Custom Business Training and On the Job Training programs.

#### MRMA

Judy McKee was not in attendance, but her report is in the packet.

### Talent Center

In Chris Wilkinson's absence, Cory Weaver reviewed the report provided in the packet. Cory was happy to report 30 hires with an average wage of \$27.29.

### Event Report

Cory Weaver highlighted items from the Event Report. She noted increased attendance at hiring events and job fairs, almost doubling attendance from the previous year. Internal business coordinators have been hired in Citrus and Levy boosting business engagement and activities in those counties. She invited committee members to visit the upcoming Citrus County Job Fair on August 27.

### Experiential Learning Contracts

Cory Weaver summarized each section of the report. Noting the successful completions that lead to employment. She explained that the Lockheed Martin apprenticeship program has re-launched and applications are now being accepted. The pre-apprenticeship program at Lake Weir's Construction Academy will be ready to accept students this year.

Kevin Cunningham asked if a pre-apprenticeship program could be developed with the Citrus County Construction Academy. Cory Weaver explained some of the nuances with developing a program. Deb Stanley expressed that Citrus County Schools would be interested in pursuing a pre-apprenticeship program. Heather Shubirg suggested that interested agencies take a tour of the existing program in Lake County. We will work together to organize a tour and further discussion.

### Metrix Users

Cory Weaver shared details from the report, noting the most popular pathways and courses. Program usage continues to grow. The link to the Metrix program can be found on the CLM website.

### Contract Reports

Sandra Crawford reviewed the performance report for Citrus and Marion counties and the youth report. Overall, the partners did well.

- County Reports:
  - Marion County met all goals for the 2023-2024 program year.
  - Citrus County met 3 of 4 goals.
  - Levy County met 2 of 4 goals.
  - We will continue to work with Citrus and Levy to meet their goals for the next program year.
- Youth Report: Eckerd met all goals for the third quarter for the previous program year and is expected to have met their goals for the fourth quarter.

### Grant Update

Sandra Crawford provided an overview of the grants. The Dislocated Worker Grant that is funding recovery efforts from Hurricane Idalia is having remarkable success in Levy and Dixie counties. Community investment in Levy and Dixie counties has reached beyond five million dollars.

The Broadband grant is also having successful outcomes with 24 enrollments and 9 individuals hired.

**MATTERS FROM THE FLOOR**

None

**ADJOURNMENT**

There being no further business, the meeting adjourned at 9:34 a.m.

**APPROVED:**

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**On-The-Job Training (OJT) Agreement**

Between CareerSource [\_\_\_\_\_] And [\_\_\_\_\_]

**Section 1. Employer Information**

OJT Provider Name:		FEIN:
Type of Business:		
Contact Person/Title:		
Address:	Phone Number:	
	Email Address:	

Worksite Information, if different from the Employer Information above.

OJT Provider Name:		FEIN:
Type of Business:		
Contact Person/Title:		
Address:	Phone Number:	
	Email Address:	

**Section 2. On-The-Job Training Agreement**

This On-The-Job Training (“OJT”) Agreement (the “Agreement”) is between CareerSource [\_\_\_\_\_] , whose legal name is [\_\_\_\_\_] (hereinafter referred to as “[\_\_\_\_\_]”), and [\_\_\_\_\_], (hereinafter referred to as “Employer”), [Employer Address] for the purpose of providing OJT services to eligible participants in accordance with the Workforce Innovation and Opportunity Act (“WIOA”). [\_\_\_\_\_] and Employer may hereinafter be referred to collectively as the “Parties” and each individually as a “Party.” Both Parties agree to the terms and conditions set forth within this Agreement. The term of this Agreement commences on [\_\_\_\_\_] , or on the last date fully executed by both parties, whichever is later, and terminates on [\_\_\_\_\_] . [\_\_\_\_\_]

The Employer agrees not to commence OJT activities with a participant until after deciding on a mutually agreed upon start date with [\_\_\_\_\_]. An eligible participant shall not begin

work/training under the OJT assignment prior to all documents<sup>1</sup> and processes being completed and executed by the Parties and the participant, as applicable.

### Occupation Eligibility

[\_\_\_\_\_] must ensure that participants are placed in OJT for occupations that are in demand in the local area, are appropriate for the program and included on the Targeted Occupations List (TOL) or for an occupation for which the employer has requested OJT. Occupations or job types that are not suitable for OJT are occupations that are:

- a. Based on commission;
- b. Seasonal in nature; or
- c. Less than part-time.

### **Section 3. General Terms and Conditions**

This Agreement may be amended at any time if both Parties agree in writing by signing an amendment to the Agreement. The agreement cannot extend beyond 12 months, except in instances where it takes longer to learn the job, e.g., apprenticeships. The Parties must document reasons for any OJT that takes longer than 12 months.

In instances where there is a Professional Employment Organization<sup>2</sup> (PEO) serving as the employer of record for the OJT activity, the PEO and the Employer must communicate with each other to ensure this agreement is carried out in accordance with the 12-month requirement and exceptions based on the time required to do the work as noted in this section.

### OJT DEFINITION

In accordance with the WIOA sec. 3 (44), the term “on-the-job training” means training by an employer that is provided to a paid participant while engaged in productive work. This training will:

- a. Provide knowledge or skills essential to the full and adequate performance of the job;
- b. Qualify for reimbursement to the employer of up to 50 percent (Note: in some circumstances, depending on the size of the employer, the reimbursement rate may go up to 75 percent) of the wage rate of the participant, for the extraordinary costs of providing the training and additional supervision related to the training;
- c. The reimbursement rate for this Agreement is: \_\_\_\_\_; and
- d. Be limited in duration as appropriate to the occupation for which the participant is being trained, taking into account the content of the training, the prior work experience of the participant, and the service strategy of the participant, as appropriate.

OJT may be provided to eligible employed workers when:

- a. The employee is not earning a self-sufficient wage or wages comparable to or higher than wages from previous employment, as determined by LWDB policy;

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<sup>1</sup> Documents include eligibility items, IEP, OJT training plan, OJT contract, and any other document needed to complete the activity.

<sup>2</sup> A Professional Employment Organization is a third-party company that manages human resources functions for small businesses, including payroll processing and benefits administration.

- b. The requirements in 20 CFR 680.700 are met; and
- c. The OJT relates to the introduction of new technologies, introduction to new production or service procedures, upgrading to new jobs that require additional skills, workplace literacy, or other appropriate purposes identified by the LWDB.

#### **Section 4. Employer Assurances**

##### **A. Compliance with the Law**

1. Conditions of employment and training will be in full accordance with all applicable federal, state, and local laws and ordinances (including but not limited to labor and employment laws, environmental laws and health and safety laws).
2. Employer agrees to schedule the participant with a full-time scheduled number of work hours. Exceptions may include holidays, requested time off, or other granted leave time.
3. Employer agrees not to engage participants in sectarian activities or in the construction of sectarian facilities while participating in an OJT activity, as provided in WIOA section 188(a)(3) and 20 CFR 683.255.
4. Employer agrees that a participant may not be assigned to an activity or employed in a position if the employer has created the vacancy or terminated an existing employee without good cause in order to fill that position with a program participant.
5. Employer agrees that this program will not result in the displacement or reduction in hours of currently employed workers or impair existing agreements or contracts for services.
6. Employer agrees that the funds reimbursed from this Agreement shall not be used to directly or indirectly aid in the filling of a job opening which is vacant because the former occupant is on strike, is being locked out in the course of a labor dispute, or the filling of a job which is otherwise an issue in a labor dispute involving a work stoppage.
7. Employer agrees that funds will not be used to impair a collective bargaining agreement, and no activity that would be inconsistent with the terms of a collective bargaining agreement shall be undertaken without the written concurrence of the labor organization and Employer concerned.
8. Employer will not encourage or discourage union activities. If employees are unionized, this Agreement has been entered into with their concurrence. Funds provided to employers pursuant to this Agreement may not be used to directly or indirectly assist, promote (encourage) or deter (discourage) union organizing.
9. Employer agrees funds provided under this Agreement will not be used to fill position openings created by layoff, staff reduction, or company re-location within 120 days prior to the execution of this Agreement and that employment under this Agreement will not result in the displacement of employed workers or impair existing agreements for services or result in the substitution of federal funds for other funds in connection with work that would otherwise be performed.
10. Employer hereby confirms it has not relocated all or part of its business (located in the US or its territories) within the previous 120 days where such relocation resulted in the loss of employment at the original site.



11. Employer assures that they have not been debarred or suspended in regard to federal funding.
12. Employer agrees that no candidate shall be placed in an OJT where a member of that person's immediate family is directly supervised by or directly supervises the candidate. Family means two or more persons related by blood, marriage, or decree of court, who are living in a single residence, and are included in one or more of the following categories: a married couple and dependent children; a parent or guardian and dependent children; or a married couple.
13. Employer commits to retaining participants upon successful completion of the OJT assignment, as permanent employees. However, the Employer shall not be obligated to retain, nor be penalized for failing to retain, any participant in the event such participant is terminated for cause, voluntarily resigns, or is laid off through a broad reduction in workforce or otherwise caused by force majeure.

B. E-Verify

Employer warrants and represents that it complies with section 448.095, F.S., in which the State of Florida expressly requires the following:

1. As of July 1, 2023, all private employers in Florida with 25 or more employees will be required to use E-Verify system to verify a new employee's employment eligibility.
2. An employer shall verify each new employee's employment eligibility within three business days after the first day that the new employee begins working for pay. If the E-Verify system is unavailable for three business days after the first day that the new employee begins working for pay and an employer cannot access the system to verify a new employee's employment eligibility, the employer must use the Employment Eligibility Verification form (Form I-9) to verify employment eligibility.

C. Wages and Benefits

1. Employer will provide the participants with the same terms of employment, working conditions, wages and fringe benefits provided to other employees in the same or similar positions while participating in the OJT assignment.
2. Participants will be compensated at the same wage rates, including periodic increases, as trainees or employees who are in similar occupations by the same employer and who have similar training, experience, and skills. Wage rates must be in accordance with applicable law.
3. Employer shall provide workers' compensation coverage for the participant.
4. Employer agrees that WIOA funds will not be used to pay fringe benefits. The Employer agrees to take full responsibility to pay fringe benefits with non-WIOA funds.

D. Reimbursement

1. [\_\_\_\_\_] will reimburse the Employer based on wages paid, at the conclusion of the specified training period, or such period as the LWDB and the Employer both agree is acceptable, following confirmation of receipt of required documentation.

2. Overtime hours in excess of 40 hours per week shall be reimbursed at the regular rate of pay. The Employer agrees to pay the overtime rate in excess of the regular rate in full using non-WIOA funds.
3. Employer will not be reimbursed for paid holidays, sick, vacation, or other leave time granted to the participants.

E. Record Requirements and Retention

1. Employer agrees to maintain adequate time and attendance, payroll, and other records to support amounts reimbursed under this Agreement.
2. Employer agrees to provide access to the records related to the program to [\_\_\_\_\_] and state and/or federal officials, through the record retention period.
3. Employer agrees to maintain such records for five (5) years after the completion of OJT activities.
4. Employer agrees to protect the Personally Identifiable Information (PII) of all OJT participants in accordance with applicable federal and state laws and policies, including, but not limited to, USDOL ETA Training and Employment Guidance Letter No. 39-11, Guidance on the Handling and Protection of Personally Identifiable Information.

**IF EMPLOYER HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO EMPLOYER'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT (telephone number, e-mail address, and mailing address).**

F. Monitoring

Employer agrees that records directly related to this OJT Agreement are subject to review, monitoring, and audit by [\_\_\_\_\_], the State and/or the federal government, at any time.

**Section 5. Training**

1. Employer agrees to employ the participant and develop a training plan for the OJT that includes competencies needed to be satisfactorily skilled in the OJT position. The training plan will be signed by [\_\_\_\_\_], the Employer, and the participant and will become part of this Agreement.
2. No training will commence prior to the training start date listed in the OJT contract and training agreement. The date shall be the same for both documents.
3. Employer agrees to notify the LWDB when the participant completes training and/or unsubsidized employment begins.
4. Employer agrees to notify the LWDB if training is extended beyond the predetermined initial date or if training is terminated prior to the agreed upon completion date.
5. This OJT agreement and the participant's training plan must be executed prior to a participant being placed in an activity and the participant shall not begin work/training prior to all required documents and processes being completed and executed by all parties.

6. Each participant will be trained in accordance with guidelines described in their individual training plan while engaged in productive work which is essential to the full and adequate performance of the job.
7. Each participant's training plan must explicitly show the required training hours, the hourly wage for the participant, and the percentage of reimbursement.

### **Section 6. Additional Terms**

[\_\_\_\_\_] and the Employer agree this Agreement shall not bind [\_\_\_\_\_] or the Employer to any exclusive relationship, including without limitation recruitment or placement. There is no expectation or required number of participants to be processed through the OJT activity. Both Parties are free to recruit, place, employ and/or assign employees to their own workforces or those of others. This Agreement shall apply only to those OJT participant(s) that the Employer and [\_\_\_\_\_] collectively agree, in writing, to place in an OJT activity under this Agreement.

This Agreement may be renewed following the initial term if such an extension is agreed upon by the Employer and [\_\_\_\_\_]. Such an extension is contingent upon satisfactory performance evaluations and is subject to the availability of funds. Terms and conditions of extensions shall be negotiated prior to the effective date of any extension.

The Employer agrees that upon successful completion of the training program and/or completion of the Employer's customary probationary period, the OJT participant will continue to be employed as a regular member of its workforce. The participant will be retained as a regular employee at the OJT agreement wage rate (or higher) as specified in this Agreement, and at a full-time scheduled number of work hours. The Employer acknowledges that failure to retain an OJT participant who has successfully completed training may be grounds for disqualification for subsequent additional OJT agreements.

The Employer agrees to comply with the wage determinations provided by the Federal government and all documentation outlined in the Davis Bacon Act, as applicable. Contractors must pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. Additionally, contractors are required to pay wages not less than once a week.

By signing this Agreement, all parties agree that the provisions contained herein are subject to all applicable Federal, State, and local laws, regulations and/or guidelines relating to nondiscrimination, privacy rights of participants, and maintenance of records and other confidential information.

When issuing statements, press releases, publications, requests for proposal, bid solicitations and other documents—such as toolkits, resource guides, websites, and presentations (hereinafter “statements”)—describing the projects or programs funded in whole or in part with federal funds, the Employer must clearly state:

- a. the percentage and dollar amount of the total costs of the program or project funded with federal money; and,

- b. the percentage and dollar amount of the total costs of the project or program funded by non-governmental sources.

The Employer will adopt and abide by a conflict-of-interest policy that ensures compliance with state and federal law and applicable CareerSource Florida State Board and FloridaCommerce policies. The Employer will make reasonable modifications to the policy if requested by FloridaCommerce. The Employer must ensure that adequate firewalls are in place to prevent actual or perceived conflicts of interest, poor internal controls, or the appearance of impropriety.

A. Termination for Convenience

Either Party may terminate this Agreement at any time for convenience, which is defined as any reason other than Termination for Cause, upon giving ten business days to the other Party. If this Agreement is terminated for convenience, [\_\_\_\_\_] shall be relieved of all obligations under the Agreement and will only be required to pay that amount of the Agreement actually performed to the date of termination. This Convenience provision is intended to allow either party to terminate the Agreement without the need to establish default. If the Agreement is terminated for convenience, the Agreement is terminated without cause or penalty.

B. Termination for Cause

In the event [\_\_\_\_\_] determines that the Employer's services are not being performed as agreed upon, the Employer shall be considered to be in default and [\_\_\_\_\_] reserves the right to terminate this Agreement for cause upon 48 hours' written notice.

This Agreement is subject to modification or termination due to actions taken by Federal, State, or Local governments that result in changes to the program.

C. Performance

Participant data will be collected by the LWDB in accordance with state and federal program guidelines on performance for the following indicators: Employment Rate 2<sup>nd</sup> Quarter After Exit, Title I Youth Education and Employment Rate-2<sup>nd</sup> Quarter After Exit, Employment Rate-4<sup>th</sup> Quarter After Exit, Title I Youth Education and Employment Rate-4<sup>th</sup> Quarter After Exit, Median Earnings 2<sup>nd</sup> Quarter After Exit, Credential Attainment, Measurable Skill Gains, and Effectiveness in Serving Employers.

D. Financial Reporting

The Employer must comply with all aspects of the Sarbanes-Oxley Act, which include the accuracy and integrity of financial reports, management and assessment of internal controls, and the CEO and CFO acceptance of responsibility for the intentional certification of financial reports that attempt to mislead or contain fraudulent information.

E. Disputes and Grievances

The Employer must work with [\_\_\_\_\_] to resolve issues that arise related to this Agreement in accordance with the local area’s grievance procedures in a timely manner. A face-to-face meeting may be requested by either Party to address the issue. When a resolution is reached, the issue and resolution must be in writing.

**F. Discrimination Complaints**

[\_\_\_\_\_] will follow the requirements in section 188 of WIOA, which prohibits discrimination on the basis of race, color, religion, sex, national origin, age, disability, or political affiliation or belief, or, for beneficiaries, applicants, and participants only, on the basis of citizenship status or participation in a WIOA Title I-financially assisted program or activity.

Programs that are funded through [\_\_\_\_\_] are equal opportunity programs that provide auxiliary aids and services for individuals with disabilities upon request. Individuals using TTY/TTD equipment use Florida Relay Service 711. Disabled individuals may submit a request for reasonable accommodations to [\_\_\_\_\_] \_\_\_\_\_.

Any person with questions or concerns regarding any form of perceived discrimination can contact the [\_\_\_\_\_] \_\_\_\_\_ CareerSource Equal Opportunity Officer. Any person can ask questions, file a complaint or state a concern without fear of retaliation or reprisal.

[\_\_\_\_\_] will not discharge, intimidate, retaliate, threaten, coerce or discriminate against any individual who files a complaint or grievance. The same prohibition applies to individuals who provide information, assist or participate in any way in an investigation, review, hearing or any additional activity that pertains to the administration of, or exercise of authority under, or privilege secured by 29 CFR Part 35.

**Section 7. Applicable Law and Jurisdiction**

This Agreement is executed and entered into in the State of Florida, and shall be construed, performed, and enforced in all respects in accordance with the laws, rules, and regulations of the State of Florida.

**Section 8. Signatures**

IN WITNESS WHEREOF, the Parties hereby agree to all the terms and conditions set forth in this OJT Agreement, and upon placing their signatures below, have hereby caused this Agreement to be executed.

\_\_\_\_\_  
Employer Representative Signature

\_\_\_\_\_  
Print Employer Representative’s Name and Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
[\_\_\_\_\_] Representative Signature

\_\_\_\_\_  
Print [\_\_\_\_\_] Representative's Name and Title

\_\_\_\_\_  
Date

## ATTACHMENT ONE

### ADDITIONAL APPLICABLE CONTRACT PROVISIONS

#### **SIMPLIFIED ACQUISITION THRESHOLD**

Contracts for more than the simplified acquisition threshold, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by [41 U.S.C. 1908](#), must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

#### **NONDISCRIMINATION, EQUAL OPPORTUNITY ASSURANCES, CERTIFICATIONS, OTHER PROVISIONS**

Each Party to this Agreement agrees to comply with the prohibitions against discrimination on the basis of age under the Age Discrimination Act of 1975 (42 U.S.C. 6101 et seq.); on the basis of disability under section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794); on the basis of sex under title IX of the Education Amendments of 1972 (20 U.S.C. 1681 et seq.); or on the basis of race, color, or national origin under title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d et seq.). The Parties agree that no individual shall be excluded from participation in, denied the benefits of, subjected to discrimination under, or denied employment in the administration of or in connection with, any program or activity relating to the operation of the one-stop delivery system because of race, color, religion, sex (except as otherwise permitted under title IX of the Education Amendments of 1972), national origin, age, disability, or political affiliation or belief.

The Employer also assures that it will comply with 29 CFR Part 38 and all other regulations implementing the laws listed above.

#### **PUBLIC ANNOUNCEMENTS AND ADVERTISING**

To comply with the Stevens Amendment, the Employer agrees that when issuing statements, press releases, request for proposals, bid solicitation, and other documents describing the project or programs funded in whole or in part under this Agreement, the Employer shall clearly state: (1) the percentage of the total cost of the program or project which will be financed with Federal money under this Agreement and (2) the dollar amount of Federal funds for the project or program.

#### **PUBLIC ENTITY CRIMES**

The Employer shall comply with subsection 287.133(2)(a), F.S., whereby a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity and may not transact business with any public entity in excess of the threshold amount provided in section 287.017, F.S., for Category Two for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

**PROCUREMENT OF RECOVERED MATERIALS**

The Employer agrees to comply with the provisions of section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act, and as supplemented by 2 CFR Appendix II to part 200 and 2 CFR part 200.323 and the requirements stated therein.

{The remainder of this page intentionally left blank}



**Individual Training Account Agreement**

Between CareerSource [\_\_\_\_\_]

and

[\_\_\_\_\_]

**Eligible Training Provider Information**

Eligible Training Provider Name:		FEIN:
Eligible Training Provider Type:		
Contact Person/Title:		
Address:	Phone Number:	
	Email Address:	

**This Individual Training Account (“ITA”) Agreement (the “Agreement”)** is made and entered into between CareerSource [\_\_\_\_\_] whose legal name is [\_\_\_\_\_] (hereinafter referred to as “[\_\_\_\_\_]”) and [\_\_\_\_\_], (hereinafter referred to as “Eligible Training Provider”), for the purpose of providing training pursuant to individual training accounts (“ITA”) in accordance with the Workforce Innovation and Opportunity Act (“WIOA”). [\_\_\_\_\_] and Eligible Training Provider may hereinafter be referred to collectively as the “Parties” and each individually as a “Party.” Consideration for this Agreement shall be the mutual covenants and promises contained herein. Both Parties agree to the terms and conditions set forth within this Agreement. The term of this Agreement commences on [\_\_\_\_\_] and terminates on [\_\_\_\_\_].

**RECITALS**

WHEREAS, [\_\_\_\_\_] has submitted an Eligible Training Provider application and has been approved for inclusion on the state and/or local ETPL;

WHEREAS, [\_\_\_\_\_] may request from time to time that the Eligible Training Provider provide certain approved training to eligible individuals referred by [\_\_\_\_\_] staff;

WHEREAS, the Eligible Training Provider agrees to provide certain approved training, subject to the terms and conditions set forth herein;

WHEREAS, this Agreement sets forth the mutual agreement of [\_\_\_\_\_] and the Eligible Training Provider as to the training program(s) to be provided to those eligible

individuals referred by [\_\_\_\_\_] staff and accepted by the Eligible Training Provider and the operating procedures governing payment for the training program(s);

NOW, THEREFORE, and in consideration of the mutual promises and covenants contained herein, the following General Provisions are HEREBY AGREED TO BY THE PARTIES:

### **Section 1. Background**

20 C.F.R. Part 680 governs the provision of WIOA Title I funded training through Individual Training Accounts (“ITAs”). An ITA is a payment agreement established on behalf of a participant with an Eligible Training Provider. Participants purchase training services from Eligible Training Providers. An Eligible Training Provider must be included on the State and/or local ETPL and is the only type of entity that receives funding for training services through an ITA. This Agreement sets forth the terms and conditions under which [\_\_\_\_\_] will fund training by Eligible Training Providers through ITAs.

### **Section 2. Application Requirements and Training**

#### **A. Eligible Training Provider Application**

1. Providers of training services programs must apply for inclusion on the ETPL pursuant to WIOA “Initial Eligibility” requirements as well as the criteria of [\_\_\_\_\_] to which the provider is applying.
2. Providers must complete and submit an Eligible Training Provider Application, which includes the training-related costs (tuition, books, fees, etc.).
3. Training is to be delivered only in accordance with the curricula submitted in the Eligible Training Provider Application.
4. Eligible Training Provider agrees to adhere to the cost of the training program that was agreed upon by the [\_\_\_\_\_] and the Training Provider, as documented in the Eligible Training Provider application.
5. Any changes to the approved training-related costs (tuition, books, fees, etc.) must be made within [\_\_\_\_\_] business days or prior to the enrollment of any individual referred by the [\_\_\_\_\_] , whichever is sooner.

#### **B. Program Description**

1. The Program Description includes the content and objectives of the training program. The Eligible Training Provider shall provide the courses as specified in the approved Program Description.
2. The Eligible Training Provider shall notify [\_\_\_\_\_] of any changes in the approved Program Description prior to the enrollment of any individual referred by [\_\_\_\_\_] staff.

**ITAs are the primary method to be used for procuring training services under WIOA. In certain circumstances, a training contract may be used to provide training services, instead of an ITA. When training services are provided to participants under a contract, an ITA will not be required to be submitted.**

### **Section 3. Participant Eligibility**

Participants referred by [\_\_\_\_\_] to Eligible Training Provider shall be enrolled only in the approved training program(s) for the designated period of time specified on the ITA and in the training plan. Eligible Training Provider shall not allow [\_\_\_\_\_] participants to switch training programs or to extend their training at the expense of [\_\_\_\_\_] without prior written approval of [\_\_\_\_\_]. Neither Eligible Training Provider nor the participant is authorized to enroll the participant into additional training courses or programs without prior written consent of [\_\_\_\_\_].

Individuals referred to [\_\_\_\_\_] by the Eligible Training Provider must qualify for assistance under WIOA guidelines, and when co-enrolled with other programs, must qualify for assistance as required by those programs. LWDBs will determine participant eligibility.

[\_\_\_\_\_] participants shall be eligible for program enrollment and participation in accordance with the same standards as the general population of the Eligible Training Provider.

If a participant is unable to continue the training agreed upon in the ITA, the Eligible Training Provider shall refer the participant back to [\_\_\_\_\_].

### **Section 4. Fiscal Requirements and Payment Procedures**

#### **A. Financial Aid/Funding Coordination**

1. The Eligible Training Provider shall ensure that program participants apply for financial aid, especially the Pell Grant, as applicable; coordinate financial assistance with [\_\_\_\_\_]; and help ensure that funds provided by [\_\_\_\_\_] are in addition to funds otherwise available in the area. It is the Eligible Training Provider's responsibility to prevent misapplication of funds when other funds would have been used for the same purpose.
2. The Eligible Training Provider will coordinate other funding sources for WIOA participants with [\_\_\_\_\_]. It is the responsibility of the Eligible Training Provider to provide sufficient oversight to prevent misapplication of funds, which results in double payment of any charges or the utilization of Federal funds when other funds could have been used for the same purpose. Coordination of funding for training may include using Pell Grants for education-related expenses such as those associated with housing, food, other living expenses, books & supplies.

#### **B. Referrals and Refunds**

1. The Eligible Training Provider understands that this Agreement does not guarantee any referrals or refunds whatsoever for the approved training programs offered by the Eligible Training Provider and covered by this Agreement. All decisions regarding the issuance of training payments will be made on a case-by-case basis by [\_\_\_\_\_], and/or its designees, taking into consideration the information available, including, but not limited to, the assessed needs of the participant, geographical location of the training and

the residence of the participant, including any additional costs of the training to the participant. Participants requesting specific training from a pre-selected school will be given a list of approved training providers that provide the same type of training to allow the participant to research each school before making a final decision. The decision to issue an ITA to a participant for the Eligible Training Provider is at the sole discretion of [\_\_\_\_\_] and/or its designees.

2. The Eligible Training Provider shall, in conformity with the general refund policies of Eligible Training Provider, refund to [\_\_\_\_\_] such training-related costs (tuition, fees, books, etc.), which are paid by [\_\_\_\_\_] for participants who enroll in and begin training but drop out of courses. Under no circumstances shall Eligible Training Provider issue refund payment(s) directly to a participant.

#### C. Payment Procedures

1. Tuition and/or other authorized payments will be considered only for those participants referred to the Eligible Training Provider by [\_\_\_\_\_] as evidenced by a valid [\_\_\_\_\_] ITA. Tuition or other payments will be made to Eligible Training Provider only for those participants enrolled in and receiving training.
2. ITAs may be used to align participants, the Eligible Training Provider, and [\_\_\_\_\_] on the training sought and associated costs for the participant. The Eligible Training Provider shall forward to [\_\_\_\_\_] an original, signed ITA (if applicable) and written invoice for this payment at the time a participant begins training and becomes eligible for invoicing. This invoice is payable to the Eligible Training Provider upon receipt in accordance with payment procedures listed herein.

#### D. Billing/Invoicing

1. The Eligible Training Provider may not invoice [\_\_\_\_\_] for approved participants until the Eligible Training Provider's drop/add period for course enrollment has concluded.
2. The Eligible Training Provider shall regularly submit invoices to [\_\_\_\_\_] for amounts agreed upon by the Parties which include the information required by this Agreement. The Eligible Training Provider shall notify [\_\_\_\_\_] if payment is not received by the date agreed upon.
  - a. Participants must be enrolled in and receiving approved training before the invoices are considered valid.
  - b. Invoices must include the participant's name, [\_\_\_\_\_] and training program and be supported by any additional receipts or payment requests.
  - c. The Eligible Training Provider shall charge [\_\_\_\_\_] for tuition, books, fees, etc., in accordance with the approved ITA issued to the participant.

- d. The Eligible Training Provider shall directly bill the participant for any costs voluntarily incurred by the participant that are not covered by the ITA.
- e. [\_\_\_\_\_] accepts no liability for unauthorized costs.
- f. Each invoice must be accompanied by the approved ITA issued to the participant by [\_\_\_\_\_].

**E. Training Dollar Maximums**

The Parties acknowledge and agree that a training dollar maximum shall be established for each participant under this Agreement. The maximum amount of training dollars for each participant shall not exceed (\$ \_\_\_\_\_) by [\_\_\_\_\_]. Additionally, [\_\_\_\_\_] reserves the right to determine and revise the training dollar maximums in accordance with applicable regulations and funding availability. Any changes to the training dollar maximums shall be communicated to the Eligible Training Provider in writing within seven business days of the change.

**Section 5. Audits**

- A. Eligible Training Provider shall make available all documents, papers, letters, or other materials prepared or received by the Eligible Training Provider that are directly pertinent to charges to this program, including any relevant financial records, supporting documentation, statistical records, interviews and discussions, and all other pertinent records of the Eligible Training Provider involving transactions related to this Agreement, at any time during normal business hours and as often as [\_\_\_\_\_], the Florida Department of Commerce or its contracted agencies, the U.S. Department of Labor, Comptroller General of the U.S., or their designated representatives may deem necessary.
- B. Eligible Training Provider will make available upon request of [\_\_\_\_\_], progress reports indicating both the progress and attendance of a participant.
- C. Eligible Training Provider agrees to provide timely and reasonable access to its personnel for interviews and discussions related to documents and review.
- D. If applicable, Eligible Training Provider shall be subject to the audit requirements contained in the Single Audit Act Amendments of 1996 (31 USC §§ 7501-7507); revised OMB Circular A-133, "Audits of States, Local Governments, and Non-Profit Organizations"; the Florida Single Audit Act, Section 215.97, Florida Statutes; and any other specific requirements imposed by [\_\_\_\_\_].

**Section 6. Performance**

The Eligible Training Provider agrees to comply with the performance expectations set forth herein by [\_\_\_\_\_] when carrying out this Agreement.

A participant must maintain satisfactory progress for each academic term by passing at least 50% of their courses or maintaining a 2.0 average. If a participant takes a course that is graded on a Pass or Fail, Satisfactory or Unsatisfactory grading system, the participant must receive a passing or satisfactory grade.

**Section 7. Agreement Termination**

- A. [\_\_\_\_\_] or Eligible Training Provider may terminate this Agreement for convenience when it is in the best interest of [\_\_\_\_\_] or the Eligible Training Provider. In the event of such termination, there shall be no interruption in services for participants already enrolled in training.
- B. [\_\_\_\_\_] may suspend this Agreement for the purpose of investigating irregularities under this Agreement. Any termination for convenience or suspension will be preceded by written notice setting forth the effective date of said termination or suspension. Eligible Training Provider has thirty (30) days after the effective date to submit invoices for payment. Eligible Training Provider shall be entitled to receive just and equitable compensation for any services performed hereunder through the date of termination or suspension.
- C. If Eligible Training Provider elects to remove themselves and their training programs from the approved Eligible Training Provider List, Eligible Training Provider is required to continue to deliver training until program completion for any participants financially supported by [\_\_\_\_\_] under the same provisions that are included in this Agreement.
- D. The Eligible Training Provider shall notify the appropriate [\_\_\_\_\_] staff no later than ten business days following a participant's termination/drop from the training program.
- E. Failure to respond to requests for previous or current participant information will result in termination of this Agreement.
- F. Failure to Perform
  - 1. If the Eligible Training Provider fails to perform, in whole or in part, as determined by the [\_\_\_\_\_] , [\_\_\_\_\_] will notify the Eligible Training Provider in writing of such unsatisfactory performance. If the unsatisfactory performance continues, [\_\_\_\_\_] will notify the Eligible Training Provider in writing of all ongoing deficiencies. The Eligible Training Provider will have ten (10) business days from receipt of notice in which to respond with a plan agreeable to [\_\_\_\_\_] to correct said deficiencies.
  - 2. Upon failure of the Eligible Training Provider to respond within the appointed time or failure of the Eligible Training Provider to respond with appropriate plans, [\_\_\_\_\_] will cease enrollments into the Eligible Training Provider's programs until the Eligible Training Provider responds with a appropriate plans to correct its deficiencies. Should the Eligible Training Provider be unable or unwilling to correct its performance, [\_\_\_\_\_] will serve a termination notice which shall become effective within fifteen (15) days after its issuance.
- G. Breach of Contract

The Eligible Training Provider shall give [\_\_\_\_\_] written notice of any perceived breach, and it shall give [\_\_\_\_\_] ten (10) business days from delivery by certified mail, (return receipt requested) of such notice to cure any perceived breach under the Agreement.

## Section 8. Modifications

This Agreement constitutes the complete and exclusive agreement between the Parties relating to the subject matter hereof. It supersedes all prior proposals, understandings, and all other agreements, oral and written, between the Parties relating to this subject matter. No agent, employee, or other representative of any party is empowered to alter any of the terms of this Agreement, unless done in writing and signed and approved by an executive officer of [\_\_\_\_\_] and an executive officer of Eligible Training Provider. The Parties agree to renegotiate this Agreement if revisions of any applicable state or federal laws, regulations, or decreases in allocations make changes to this Agreement necessary.

### **Section 9. Applicable Law and Jurisdiction**

This Agreement will be construed, performed, and enforced in all respects in accordance with the laws, rules, and regulations of the State of Florida.

#### **A. Confidentiality**

Both Parties recognize they may have access to confidential student records. Both Parties will keep all records confidential to the extent required by applicable law, including, but not limited to, the Family Educational Rights and Privacy Act. Any information received by the Parties in the performance of this Agreement, or from any employee, student, or parent participating in or involved in the training, will not be shared or otherwise disseminated except as allowed or required by law.

**IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT: (telephone number, e-mail address, and mailing address).**

### **Section 10: Compliance with Applicable Laws and Regulations**

No [\_\_\_\_\_] WIOA participants, regardless of program [\_\_\_\_\_] participants. [\_\_\_\_\_] WIOA participants shall be afforded all the rights, privileges, and benefits available to the general population of the Eligible Training Provider. The Eligible Training Provider agrees that each individual referred by [\_\_\_\_\_] staff for training will be evaluated for all financial aid eligibility normally available to other individuals.

During the performance of this Agreement, both Parties shall comply with Title VII of the 1964 Civil Rights Act, as amended, and the Florida Civil Rights Act of 1992, in that the Parties shall not discriminate on the grounds of race, color, national origin, religion, sex, age, handicap, or marital status or in any form or manner regarding the participants, employees or applicants. Other applicable federal and state laws, executive orders, and regulations prohibiting the type of discrimination as herein delineated are included by this reference thereto.

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

- Section 188 of WIOA, which prohibits discrimination against all individuals in the United States based on race, color, religion, sex, national origin, age, disability,

political affiliation, or belief, and against beneficiaries on the basis of either citizenship status or participation in any WIOA Title I financially assisted program or activity.

- 29 C.F.R. Part 38, which implements the nondiscrimination and equal opportunity provisions contained in section 188 of WIOA.
- The Age Discrimination Act of 1975, as amended, which prohibits discrimination based on age.
- Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs.
- The American with Disabilities Act of 1990, as amended (42 U.S.C. 12101 et. Seq.).

To comply with the Stevens Amendment, the Eligible Training Provider agrees that when issuing statements, press releases, request for proposals, bid solicitation, and other documents describing the project or programs funded in whole or in part under this Agreement, the Eligible Training Provider shall clearly state: (1) the percentage of the total cost of the program or project which will be financed with Federal money under this Agreement; (2) the dollar amount of Federal funds for the project or program; and (3) the percentage and dollar amount of the total costs of the project or program that will be financed by non-governmental sources.

The Eligible Training Provider shall comply with subsection 287.133(2)(a), F.S., whereby a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity and may not transact business with any public entity in excess of the threshold amount provided in section 287.017, F.S., for Category Two for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

The Eligible Training Provider agrees to comply with the provisions of section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act, and as supplemented by 2 CFR Appendix II to part 200 and 2 CFR part 200.323 and the requirements stated therein.

## **Section 11. Notices and Communications**

The following individuals have been designated by the Parties to act as their liaisons for all issues related to this Agreement and to send and receive certified mail and other mail or written notices related to contractual obligations. Either Party may designate a different liaison by providing written notice of the name, title, address, email address, and phone number of the new representative to the other Party within [#] business days.

### **For Eligible Training Provider:**

Name:

Title:

Address:

Email:

Phone:



**For**

Name:

Title:

Address:

Email:

Phone:

**Section 12. Signatures**

IN WITNESS WHEREOF, the Parties hereby agree to abide by all terms and conditions set forth in this ITA Agreement, and upon placing their signatures below, have hereby caused this Agreement to be executed.

\_\_\_\_\_  
Eligible Training Provider Representative Signature

\_\_\_\_\_  
Print Eligible Training Provider Representative's Name and Title

\_\_\_\_\_  
Date

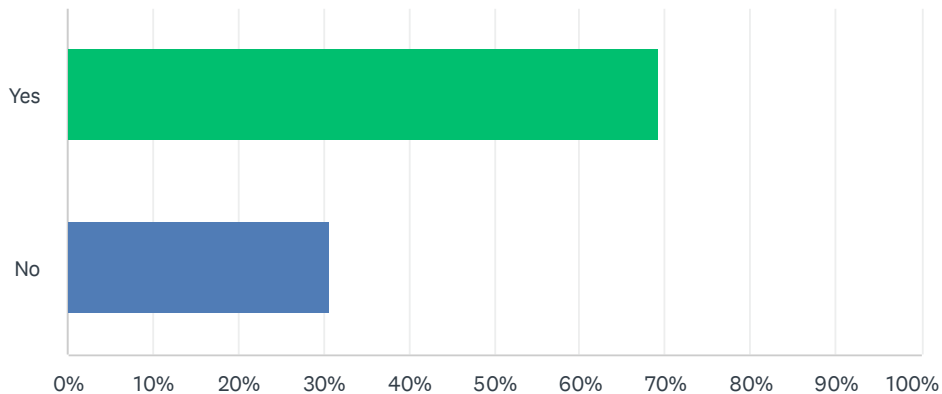
\_\_\_\_\_  
[ \_\_\_\_\_ ] Representative Signature

\_\_\_\_\_  
Print [ \_\_\_\_\_ ] Representative's Name and Title

\_\_\_\_\_  
Date

# Q1 Are you familiar with CareerSource Citrus Levy Marion (CSCLM), which provides employment-related services to local businesses?

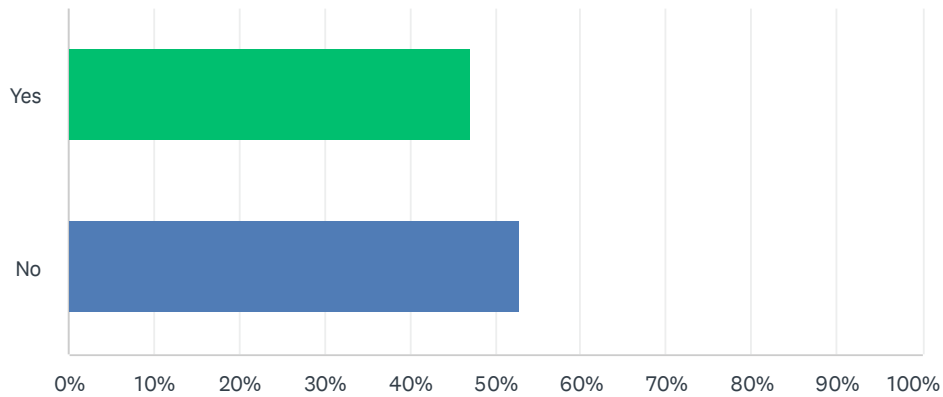
Answered: 88 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	69.32%	61
No	30.68%	27
<b>TOTAL</b>		<b>88</b>

Q2 In addition to helping employers fill open positions with qualified applicants, CSCLM also provides no-cost services that can reimburse up to 50% of new hires' wages or help train existing employees to gain new skills. Would you like to learn more about securing funding to help hire/train staff?

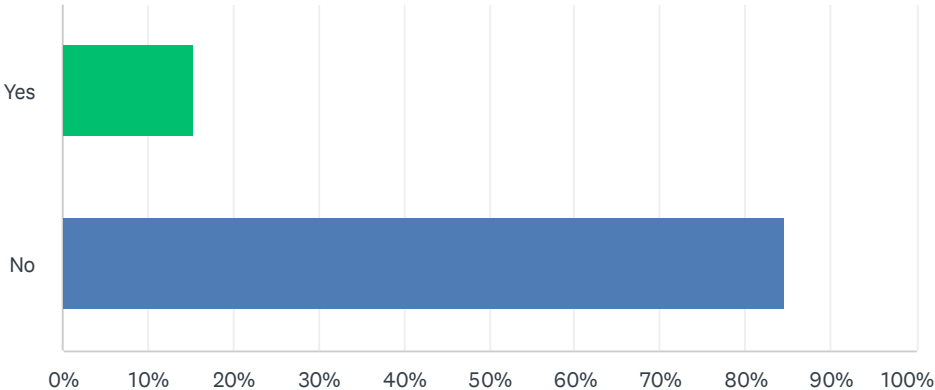
Answered: 87 Skipped: 1



ANSWER CHOICES	RESPONSES	
Yes	47.13%	41
No	52.87%	46
TOTAL		87

### Q3 Has CSCLM helped you train employees in the past?

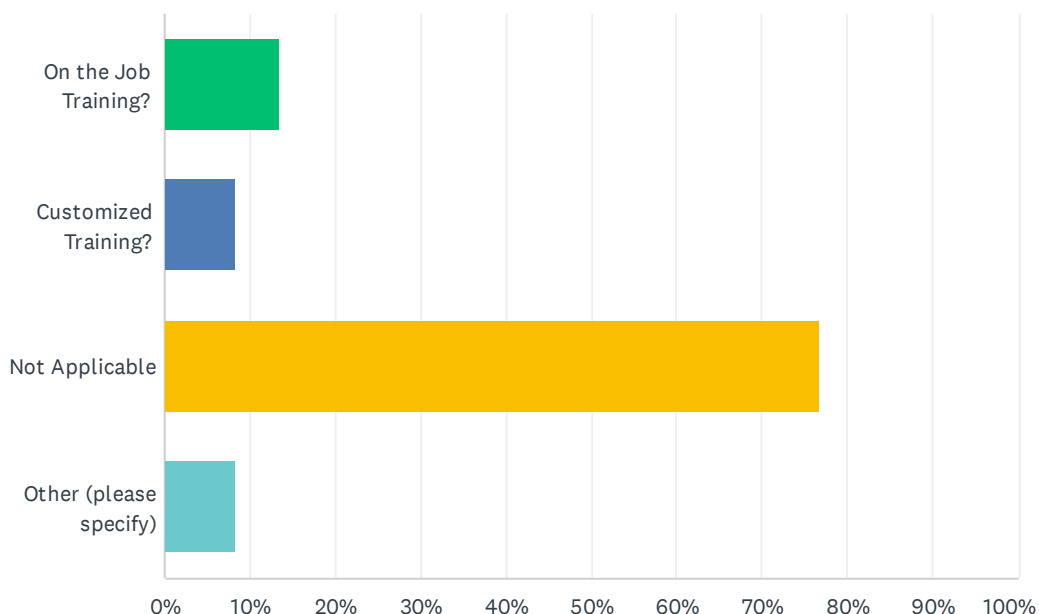
Answered: 85 Skipped: 3



ANSWER CHOICES	RESPONSES	
Yes	15.29%	13
No	84.71%	72
TOTAL		85

## Q4 Was that training ...

Answered: 60 Skipped: 28



ANSWER CHOICES	RESPONSES
On the Job Training?	13.33% 8
Customized Training?	8.33% 5
Not Applicable	76.67% 46
Other (please specify)	8.33% 5
Total Respondents: 60	

#	OTHER (PLEASE SPECIFY)	DATE
1	Licensing	10/23/2024 12:55 PM
2	Certification	10/23/2024 9:32 AM
3	Youth Build Program	10/8/2024 9:59 AM
4	My husbands company Wiley Productions has hired a few with your help!	10/3/2024 11:20 AM
5	In a former position they provided insight on such things as direction to employee handbook, on site training ideas, and symposiums for management	10/3/2024 9:24 AM

## Q5 What worked well when using the training services?

Answered: 14 Skipped: 74

#	RESPONSES	DATE
1	The training aligned with our needs	10/25/2024 10:05 AM
2	People come to the workplace with knowledge	10/23/2024 12:55 PM
3	Combination of online and in person	10/23/2024 9:35 AM
4	The program set up and communication w/staff. They are fantastic.	10/23/2024 9:32 AM
5	I personally used the services when I was unemployed back 2014. The resume is key and the learning skills were also much appreciated.	10/23/2024 9:21 AM
6	The real life aspect of the work that was to be applied.	10/23/2024 9:19 AM
7	we have not tried it yet	10/23/2024 9:10 AM
8	Career Source training and preparing the youth	10/8/2024 9:59 AM
9	N/A	10/3/2024 3:51 PM
10	N/A	10/3/2024 10:52 AM
11	It met the needs we identified for our employees	10/3/2024 9:25 AM
12	The candidate gets great training and the company gets a potential employee they have already trained.	10/3/2024 9:18 AM
13	NA	10/3/2024 9:13 AM
14	Various resources being available	10/3/2024 9:09 AM

## Q6 What -if anything - did you find challenging or less than ideal when working with CSCLM or using the training services?

Answered: 12 Skipped: 76

#	RESPONSES	DATE
1	Setting the training up was cumbersome	10/25/2024 10:05 AM
2	Did not work with them	10/23/2024 12:55 PM
3	Na	10/23/2024 9:35 AM
4	Some of the technology (job posting/finding qualified candidates was challenging).	10/23/2024 9:32 AM
5	none	10/23/2024 9:21 AM
6	OJT slows or removes productivity.	10/23/2024 9:19 AM
7	not been through process yet	10/23/2024 9:10 AM
8	It works well, some of the candidates just wish that they could start working on the homes sooner in the process.	10/8/2024 9:59 AM
9	N/A	10/3/2024 3:51 PM
10	N/A	10/3/2024 10:52 AM
11	You can't control whether a candidate will complete the internship. People have personal issues outside of work that prevents them from completing the program.	10/3/2024 9:18 AM
12	NA	10/3/2024 9:13 AM

## Q7 What could be improved or changed with the contracting or payment process used by CSCLM?

Answered: 11 Skipped: 77

#	RESPONSES	DATE
1	Simple online forms for contracting and payment processing	10/25/2024 10:05 AM
2	I think they are doing a great job	10/23/2024 12:55 PM
3	Na	10/23/2024 9:35 AM
4	n/a	10/23/2024 9:21 AM
5	n/a	10/23/2024 9:19 AM
6	n/a	10/23/2024 9:10 AM
7	N/A	10/8/2024 9:59 AM
8	N/A	10/3/2024 3:51 PM
9	N/A	10/3/2024 10:52 AM
10	The process works. It's just up to the people to have the will to complete the program.	10/3/2024 9:18 AM
11	NA	10/3/2024 9:13 AM



## Q8 What are the reasons, if any, for not partnering with CSCLM yet to train your employees?

Answered: 49 Skipped: 39

#	RESPONSES	DATE
1	Cost	10/25/2024 12:31 PM
2	I don't need the government even more in my business	10/25/2024 10:08 AM
3	Unaware of services	10/25/2024 10:04 AM
4	didn't know	10/24/2024 12:27 PM
5	Don't know how to use it.	10/24/2024 10:28 AM
6	Not aware of program.	10/23/2024 2:10 PM
7	Low turnover, good in house training, and hiring practices that focus on seasoned, already trained professionals.	10/23/2024 2:08 PM
8	Was not aware to the training	10/23/2024 1:55 PM
9	N/A	10/23/2024 1:47 PM
10	not many employees at company, can come on as a licensed LO.	10/23/2024 12:55 PM
11	Didn't know about it.	10/23/2024 10:52 AM
12	Not aware of the option.	10/23/2024 10:49 AM
13	I wasn't aware they offered training services. Actually, I wasn't aware they did anything besides unemployment.	10/23/2024 10:35 AM
14	Not aware of the service	10/23/2024 10:10 AM
15	N/A	10/23/2024 9:53 AM
16	Not needed at this time	10/23/2024 9:36 AM
17	I changed roles and no longer make those decisions	10/23/2024 9:33 AM
18	We are a thoroughbred breaking and training horse farm that requires specialized on-the-job training that is very specific to our horses' needs.	10/23/2024 9:25 AM
19	I do not have local employees or the need for them yet. However, I have worked with Career Source in the past (Broward County) and value your mission and services and I do plan on using CSCLM in the future as my business grows.	10/23/2024 9:24 AM
20	not a decision maker	10/23/2024 9:21 AM
21	At this time, we are not looking to expand - CSCLM will be at the top of my list when looking to expand.	10/23/2024 9:20 AM
22	Done in house.	10/23/2024 9:12 AM
23	We are based further south, in Sumter County and our employee base is here.	10/23/2024 9:12 AM
24	small staff, low turnover	10/23/2024 9:10 AM
25	I work at the College of Central Florida, and we partner with CSCLM for our students, but CF has an internal employee training department that meets our needs.	10/23/2024 9:08 AM
26	I believe our organization completes all training in house. I am not in the Human Resources or Training departments.	10/23/2024 9:07 AM
27	Our clients are visually impaired and blind.	10/23/2024 9:05 AM

## Work-based Learning Survey

28	We use our own HR department for hiring and training is done at our facility.	10/23/2024 9:05 AM
29	I'm not the decision maker	10/23/2024 9:04 AM
30	Don't know anything about what you do.	10/11/2024 11:17 AM
31	N/A	10/8/2024 9:59 AM
32	Did not know about it and doesn't apply to our business. We are a dance studio so dance and teaching training is done in house.	10/3/2024 8:11 PM
33	Seems complicated	10/3/2024 4:00 PM
34	We are very small. We haven't hired many employees.	10/3/2024 3:56 PM
35	wasnt sure if I would have a position that you could help fill. I own a dance studio, but I could use a front desk greater.	10/3/2024 11:21 AM
36	I don't have employees. I only have booth renters.	10/3/2024 10:52 AM
37	1) Size of office (1 person) 2) Financial advisors have industry-specific licensing and training	10/3/2024 10:43 AM
38	We have primarily contracted workers who are hired to perform specific grant deliverables.	10/3/2024 9:57 AM
39	I wasn't aware of it until now.	10/3/2024 9:38 AM
40	Most positions require specialized training which we provide to new employees	10/3/2024 9:29 AM
41	I've partnered with them, but because the past 3 interns not making it through the program I'm not allowed to use it on the Adult side any more only the Ekerd.	10/3/2024 9:27 AM
42	Current position does not utilize outside resources for such. We have "in house" training and procedures	10/3/2024 9:25 AM
43	I am not an employer	10/3/2024 9:21 AM
44	I'm not the decision maker	10/3/2024 9:18 AM
45	specialized work	10/3/2024 9:13 AM
46	Single employee company :)	10/3/2024 9:13 AM
47	NOT SURE IF ANYTHING APPLIES TO FARM WORK OR TOURISM GUIDES.	10/3/2024 9:13 AM
48	We have and continue to partner when the need arises.	10/3/2024 9:09 AM
49	test	9/30/2024 8:34 AM



August - October 2024

Operational time has been spent on:

- Getting set to send out MRMA membership renewals
- Setting up First Meeting of our Strategic Planning & Goals in November
- Introductory Meetings with Partners - ongoing
- Meeting with Member Companies - - ongoing
- Prospecting New Members - ongoing
- The 20<sup>th</sup> Annual MRMA Golf Tournament scheduled for October 17<sup>th</sup>, the sole purpose of this event is to raise funds for educational awareness and to support programs related to manufacturing, engineering, distribution, logistics and supply chain management.
- Reviewing Funding Requests issued utilizing earmarked funds from both the Bowling Tournament and the Golf Tournament.
- MRMA has given out to date the following CDL Funding Requests through funds made available from proceeds of the annual bowling tournament: **\$10,700 to FleetForce and Marion Technical College.**
- In 2024, MRMA has awarded the following Funding Requests through funds made available from proceeds of the annual golf tournament:
  - **\$2,050** in support of the **Bellevue High School Robotics Automation & Design (RAD) Program**
  - **\$3,000** in student scholarships provided through the **Rob Adamiak Memorial Student Scholarship**
  - **\$600** in support of **Youth Career Expos for Marion, Citrus and Levy counties**
  - **\$1,500** in support of **Withlacoochee Technical College**
  - **\$1,481** in support of **Lockheed Martin STEMCon youth program**
  - **\$1,314** for the **Sumter County High School Welding Program**
  - **\$1,271** for the **Sumter County Middle School STEM Program**
  - **\$2,890** in support of the **College of Central Florida FANUC Robotics Program**
  - **\$2,500** for **Marion County Public Schools (MCPS)** to expose 80 students to the UCF/NASA Research & Education Program related to STEM.

Events that I have attended, helped plan or are on my calendar to attend:

- Met with Levy County CTE Director and CTE Teachers on August 9<sup>th</sup> along with Leah Gamble, CF Levy Campus. We both spoke to the group on how MRMA partners with them and how CF can help them develop a CAD program for their students to give their graduation higher training so area employers receive quality talent. CAD is in high demand.
- MRMA hosted in September our Learning Series Economic Forum. The Learning Series is not getting ready to have its' November Leadership Forum. The 2025 Program is being set to have at least 3-4 high level programs. This series will be rolled into the MRMA Program of Best Tour Practices.
- MRMA is pleased to say that we had our first successful Quality Forum on October 24 at CF. Barbara Luider of Marion Precision Tool and Saley Abraham of CF are co-chairing this forum. These will be held on a quarterly basis.

- Some MRMA members and CF instructors attended the BAC held at Osceola Middle School on October 23<sup>rd</sup> from 5:30p-7:00p. This was facilitated by Joe Corley, Fidelity Manufacturing in partnership with Julie Connolley, MCPS and CTE Director.
- MRMA will begin their Strategic Goals meeting at the November Board Meeting to set a timeline and goals for their 3-5-10 year plans.
- MRMA's 20<sup>th</sup> Annual Golf Tournament held on October 17, was a huge success. Totals raised surpassed last year, and the weather could not have cooperated any better!
- MRMA continues to attend area manufacturing meetings in Sumter County to build a Sumter County membership base. Just recently attended the 2<sup>nd</sup> Annual Sumter County Workforce Summit on 10/24. **Sumter Workforce Summit - 10/24/24 Info:**  
**Attendees - 92**  
Employers - 26  
Schools Staff - 48  
Students - 11  
Partners - 6
- The SCED meeting that was scheduled for September was canceled due to hurricanes.
- MRMA is continuing to work in partnership with CTE Directors in Marion County and Levy County to bring back Manufacturing Day Tours for High Schoolers to tour area manufacturing facilities.  
We successfully completed a manufacturing tour between Custom Windows and WestPort High School.  
Working with Levy county to schedule manufacturing tours between Ancorp & Monterey Boats with Bronson Schools in February. Meeting on October 30<sup>th</sup> to discuss.  
Working with Marion County Manufacturers to host 4 more schools in February.



## REPORTING PERIOD: JUL 2024 - SEP 2024

### ALL CENTER TRAFFIC – 223

One-on-one Appointments Total – 118

Professionals – 89  
Students – 29

In Person – 82%  
Virtual – 18%

### WORKSHOPS CONDUCTED – 9

Healthcare – 2  
Information Technology – 4

First Year Seminar – 1  
Early Childhood Education – 1  
Community Outreach – 1

### TOTAL ATTENDANCE FOR WORKSHOPS – 165

Resumes reviewed and feedback provided – 116

### CANDIDATE OUTREACH: STUDENTS AND PROFESSIONALS

5 Events – Total attendance for events – 172

CF Resource Fair – 2  
TC Open House – 1

Talent Connection – 1  
CF Webinar – 1

### CONFIRMED HIRES

6

### AVERAGE HOURLY WAGE

\$24.93

### TESTIMONIALS FROM STUDENTS & PROFESSIONALS

- This was a smooth operation, and I would recommend your services to anyone entering the working world, like me. Thank you again.
- Christopher Wilkinson put my mind at ease by walking me through the steps to improve my resume, enhancing my LinkedIn and exploring several career platforms.
- Ms. Sanford is very attentive to her clients at the Talent Center. She is very good at what she has done, such as offering advice and suggestions re' resume, cover letter and interview construction.
- Ms. Sanford is very professional, yet very personable with her customers. She is relatable in that she doesn't mind sharing her own experiences when job hunting. She seems to go above and beyond the "call of duty" for her customers.



# Experiential Learning Contracts

PY2024-2025

## Customized Training

Business	Industry	Total Trained	Employer Contribution	CareerSource Reimbursement	Begin	End Date	Status
Nash Plumbing and Mechanical	Construction	1	\$430.00	\$430.00	5/28/2024	5/27/2025	In Progress
Maricamp Animal Hospital	Professional	1	\$515.00	\$0.00	7/1/2024	6/30/2025	Unsuccessful Completion
PedIM Specialist	Healthcare	2	\$3,839.00	\$3,839.00	7/10/2024	11/8/2024	In Progress
Artemis Plastics	Manufacturing	2	\$0.00	\$1,600.00	9/7/2024	9/19/2024	Completed - Retained

## On the Job Training

Business	Industry	Total Trained	Employer Contribution	CareerSource Reimbursement	Begin	End Date	Status
Benton Technical	Construction	1	\$3,997.50	\$3,997.50	4/15/2024	7/10/2024	Unsuccessful Completion
Benton Technical	Construction	1	\$3,997.50	\$3,997.50	4/15/2024	7/29/2024	Completed - Retained
Veterans Repair Services	Automotive	1	\$5,000.00	\$14,298.00	4/30/2024	7/23/2024	Completed - Retained
Quest Avionics, Inc	Public	1	\$1,000.00	\$4,590.00	5/1/2024	6/19/2024	In Progress
Benton Technical	Construction	1	\$4,000.00	\$12,000.00	5/28/2024	8/7/2024	Unsuccessful Completion

## Paid Work Experience

Business	Industry	Total Trained	Wage	Begin	Status
Life Line Institute	Education	1	\$14.40	9/27/2024	Completed - Hired
Life Line Institute	Education	1	\$14.40	10/4/2023	Completed - Hired
SAS Electronics	Construction	1	\$13.50	10/21/2024	Successful Completion
Novari Care	Healthcare	1	\$13.50	10/29/2024	In Progress

## Internships

Business	Industry	Total Trained	Wage	Begin	Status
Trinity Surfaces	Wholesale	1	\$15.00	8/26/2024	Successful Completion

## Apprenticeship

Business	Industry	Occupation	Total Trained	Begin	Status
Lockheed Martin	Manufacturing	Electronic Assembler	4	Spring 2020	2 Hired PY20-21, 2 Hired PY 21-22



# SKILL UP USERS

LOCATION	PY 20-21	PY 21-22	PY 22-23	PY 23-24	PY 2024			PY 24-25	Total
					Jul-24	Aug-24	Sep-24		
Citrus	86	32	24	47	4	9	7	20	209
Citrus - CF	30	7	11	2	1	1	1	3	53
Levy	22	6	7	20	2	3	2	7	62
Levy - CF	16	3	4	0	0	0	0	0	23
Marion	140	53	55	176	14	14	12	40	464
Marion - CF	100	24	37	47	11	4	5	20	228
<b>TOTAL</b>	<b>394</b>	<b>125</b>	<b>138</b>	<b>292</b>	<b>32</b>	<b>31</b>	<b>27</b>	<b>90</b>	<b>1039</b>

### Popular Pathways

1. Business (Administrative/Management)
2. Healthcare
3. Entry Level Pathway - General
4. Information Technology
5. Personal Care/Human Services and Marketing/Sales/Retail

### Popular Courses

1. The Art and Science of Communication
2. Using Business Etiquette to Increase Your Professionalism
  3. Being an Effective Team Member
  4. Establishing Self-confidence for Life
  5. Communicating Effectively with Customers
  6. Uncovering and Utilizing Your Talents and Skills
  7. Becoming More Professional through Business Etiquette
    8. Interacting with Customers
    9. Writing Effective E-mails and Instant Messages
    10. How Culture Impacts Communication
  11. Difficult People: Can't Change Them, so Change Yourself
    12. Procrastination: Admitting it is the First Step
    13. Be a Better Listener
    14. Self-improvement for Lifelong Success
  15. Abbreviating, Capitalizing, and Using Numbers

# Grant Updates

## **National Dislocated Worker Grant (Citrus, Levy and Dixie Counties)**

Reemploys individuals displaced by natural disasters to conduct cleanup and recovery work. This grant started with recovery efforts from Hurricane Idalia and will now be evolving to include impacts from Hurricanes Helene and Milton. Activities include Disaster Clean-Up in Citrus County and the continued support of assisting shellfish growers in Levy and Dixie Counties.

### **Levy and Dixie:**

We have completed enrollments into the NDWG for the shellfish growers.

Total Enrollments: 197 (192 Levy, 5 Dixie)

Work began on March 4 with first cohorts of workers from Hurricane Idalia.

We expect the grant to wrap up in December of 2025.

Total community investment to date (through 10/4/2024): \$7,429,319.87

Additional funding has been requested to assist with individuals impacted by Helene and Milton.

## **Creating Connections Broadband (Levy County)**

Total Enrollments to Date: 24

Total Training Certifications: 70

Total Employed: 12

Successful networking with several local telecommunications employers has led to 3 offers of employment within the industry, 2 direct hires were High School Graduates from Levy County High Schools that are now working for Benton Technical Services in the Fiber Division here in Florida's rural counties and hurricane disaster areas.

We have completed 3 Custom Business Trainings with Local Levy County Employers

Upcoming Classes: December 2024, February, June and October 2025

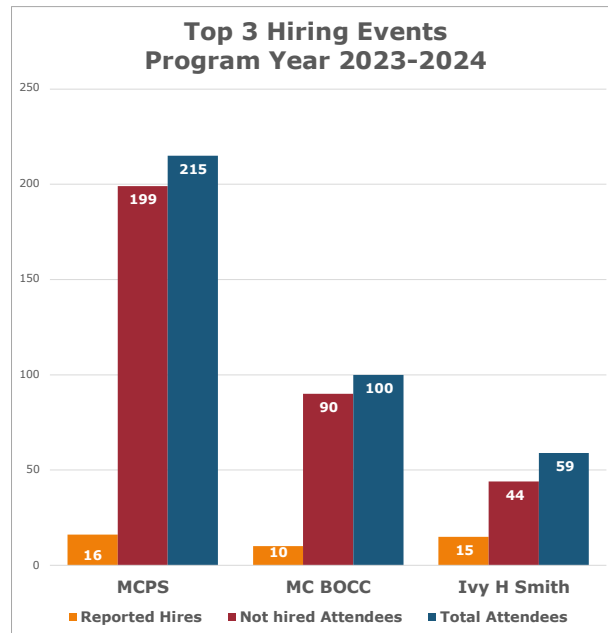
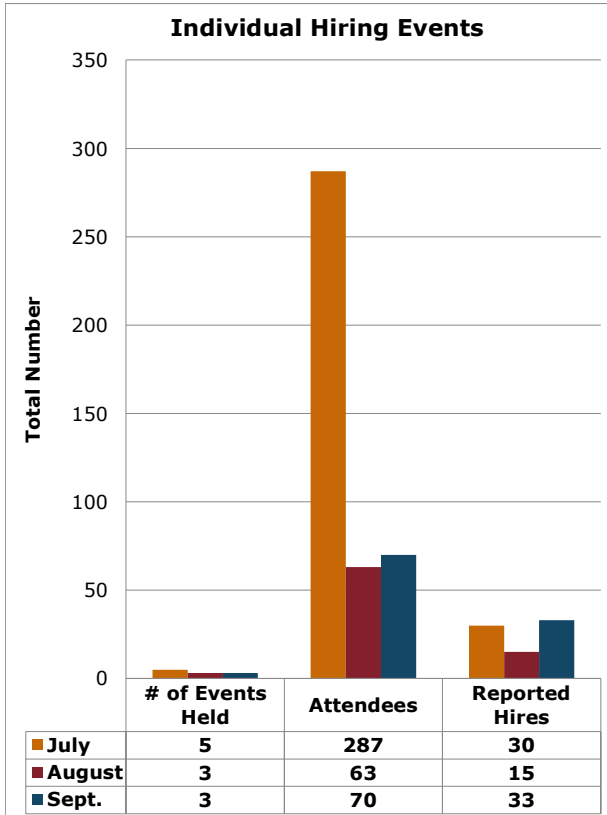
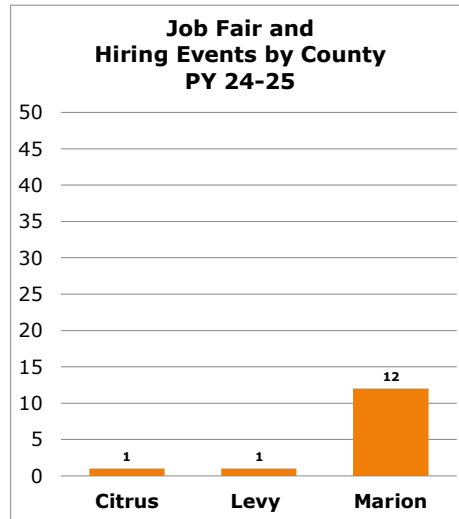


## PY 24 - 25 Individual Events

**Total Events: 11**  
**Attendees: 420**  
**Reported Hires: 78**

## PY 23 - 24 Job Fairs

**Attendees: 571**  
**Businesses: 66**



### Other Individual Hiring Events 7/2024 - 9/2024

Event Date	Event Name	Event Location	County
7/16	Florida Department of Agriculture	Chiefland Center	Levy
7/24	Coke Florida	14th Street	Marion
7/30	Kids Central	14th Street	Marion
8/1	Florida Department of Juvenile Justice	Marion Regional JDC	Marion
8/7	Ring Power	14th Street	Marion
9/4	RealTruck	RealTruck	Marion
9/5	Coke Florida	14th Street	Citrus



	Q1 PY24-25			Q2 PY24-25			Q3 PY24-25			Q4 PY24-25			ANNUAL		
	Goal	Goals Met	Rate	Goal	Goals Met	Rate	Goal	Goals Met	Rate	Goal	Goals Met	Rate	Goal	Goals Met	Rate
<b>County Chamber/EDC</b>															
CITRUS (Citrus Chamber)	4		0.00%	4			4			4			4		
MARION (CEP)	4	4	100.00%	4			4			4			4		
LEVY (Nature Coast)	4			4			4			4			4		

**Quarterly Goals - Partner Chambers**

- Conduct 1 quarterly meeting with assigned CSCLM staff to discuss business needs/challenges - **All**
- Conduct joint business and retention visits - **All**
- Monthly meetings with key business staff to maintain communication of new and existing projects as well as current business needs - **Marion Only**
- Provide business referrals to CSCLM for workforce services - **All**
- Provide business/professional referrals to Talent Center - **Marion/Citrus Only**
- Provide assistance in planning and staff for the Youth Career Expos - **Marion/Citrus Only**
- Attend at least 1 meeting per quarter at Chiefland, Williston, Bronson, Inglis Chamber - **Levy Only**

	Q1 PY24-25			Q2 PY24-25			Q3 PY24-25			Q4 PY24-25			ANNUAL		
	Goal	Actual Performance	Payment	Goal	Actual Performance	Payment	Goal	Actual Performance	Payment	Goal	Actual Performance	Payment	Goal	Actual Performance	Payment
<b>Eckerd Youth Connects</b>															
Enrollments	20		\$1,595.83	20			25			20			85		
Measureable Skills Gains	81%			81%			81%			81%			81%		
Employment/Education Retention Rate 2nd Quarter After Exit	74%			74%			74%			74%			74%		
Employment/Education Retention Rate 4th Quarter After Exit	72%			72%			72%			72%			72%		
Credential Attainment Rate	83%			83%			83%			83%			83%		
Median Wages	\$3,365			\$3,365			\$3,365			\$3,365			\$3,365		