



CareerSource CLM  
 2703 NE 14<sup>th</sup> Street  
 Ocala, FL 34470

**Executive Committee Meeting**  
 Wednesday, November 20, 2024 – 9:30 a.m.

Join Zoom Meeting: <https://us02web.zoom.us/j/89942588497>

Phone No: 1-646-558-8656 (EST) Meeting ID: 899 4258 8497

Call to Order		C. Flanagan
Roll Call		C. Schnettler
Approval of Minutes, August 28, 2024	Pages 3 - 5	C. Flanagan

**DISCUSSION ITEMS**

State Update		R. Skinner
Workforce Issues Important to Our Community		R. Skinner
Revised OJT and ITA Forms	Pages 6 - 25	D. French

**PUBLIC COMMENT**

**ACTION ITEMS**

Youth ITN Release	Page 26	D. French
Regional Planning: Submission of Supporting Documentation	Pages 27 - 41	R. Skinner

**PROJECT UPDATES**

None

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



**CAREERSOURCE CITRUS LEVY MARION  
Executive Committee**

**MINUTES**

DATE: August 28, 2024  
PLACE: 2703 NE 14<sup>th</sup> Street, Ocala, FL 34470  
TIME: 9:30 a.m.

**MEMBERS PRESENT**

Al Jones  
Brandon Whiteman  
Carl Flanagan  
Charles Harris  
Fred Morgan  
Jeff Chang  
Pete Beasley

**MEMBERS ABSENT**

Arno Proctor

**OTHER ATTENDEES**

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

Cira Schnettler, CSCLM  
Bob Stermer, Board Attorney

**CALL TO ORDER**

The meeting was called to order by Carl Flanagan, Chair, at 9:30 a.m.

**ROLL CALL**

Cira Schnettler called roll and a quorum was declared present.

**APPROVAL OF MINUTES**

Al Jones made a motion to approve the minutes from the May 29, 2024, meeting. Pete Beasley seconded the motion. Motion carried.

**DISCUSSION ITEMS**

**State Update**

Rusty Skinner provided the following update:

- Clam Grant: The State was delayed in filing a funding request to the federal program. In the interim the funding for the program has been made through other resources, which may be exhausted if program funding is not received timely.
- Subgrantee Agreement: A final draft has been emailed to all board members. Regional feedback has been sent to the State. When the final version is completed, it will also be presented to the Board.

### Workforce Issues that are Important to our Community

Al Jones stated that he attended the recent Citrus County Job Fair and was impressed at the number of attendees and how well they were prepared. He gave kudos to the business services team.

### Regional Planning

During the upcoming Summit, Rusty Skinner will be meeting with the two other regions to further discuss regional planning, along with Ernst and Young and CareerSource Florida representatives. To meet the State's deadlines a Special Executive Committee may be called to approve the plan.

### USDOL/ETA Advisories - Training and Employment Guidance Letters (TEGL) Update TEGL 15-23 – Employment and Training Administration Recipient Responsibilities for Reporting Instances of Suspected Fraud, Program Abuse, and Criminal Conduct

The advisory is included in the packet for review.

### 2022-2023 Final Monitoring Report

Dale French explained that the report is one and half years behind. A response was submitted and accepted by the State. It was requested to receive the reports in a timely manner in the future.

### **PUBLIC COMMENT**

None

### **ACTION ITEMS**

#### MOU Renewals – Mandatory Partners

Dale French explained that the MOU's are reviewed every year and updated every three years.

Charles Harris made a motion to approve the execution of the MOU's for the mandatory partners. Jeff Chang seconded the motion. Motion carried.

#### Telework and Work From Home (WFH) Status

Dale French explained the benefits to the staff and organization of the updated policy.

Charles Harris approved the amendment to the personnel policy to include the new Work From Home / Telework policy. Pete Beasley seconded the motion. Motion carried.

#### CBT Wage Gap

Dale French advised that adjusting the wage cap will expand the potential candidates that may qualify for the programs. We are working with the CEP to conduct a survey of local businesses to gauge interest in our programs or identify barriers to utilizing the programs.

Fred Morgan made a motion to approve increasing the Employed Worker/Custom Business Training wage cap to \$36.56 per hour or the salaried equivalent of \$76,062.00. Jeff Chang seconded the motion. Motion carried.

#### Summit Sponsorship

Fred Morgan made a motion to approve the \$5,000 sponsorship for 2024 Workforce Professional Development Summit. Charles Harris seconded the motion. Motion

carried.

#### Budget Modification – Eckerd Youth

Dale French stated that the Department of Labor re-released the YouthBuild grants for next year. Proposals are due mid-September for a Spring start. To keep the momentum going for a condensed version of the program through Fall and Winter additional funding is being requested.

Pete Beasley made a motion to amend the Eckerd budget to include \$200,000 in additional funding. Charles Harris seconded the motion. Motion carried.

#### TransfrVR

Dale French shared that TransfrVR is a company that utilizes virtual training for career exploration. This type of training may be another avenue to appeal to young adult customers through technology.

Fred Morgan made a motion to approve the application for grant funding to fund a two-year virtual reality training program. Pete Beasley seconded the motion. Motion carried.

#### Final 2024-2025 Budget

Dale French reviewed the budget reports noting the additional funding streams that will impact the budget.

Fred Morgan made a motion to approve the final 2024-2025 budget. Pete Beasley seconded the motion. Motion carried.

#### Subgrantee Agreement

Charles Harris made a motion to approve the draft version of the subgrantee agreement and authorize the Board Chair to sign a final agreement. Pete Beasley seconded the motion. Motion carried.

#### Deferred Compensation Program

Rusty Skinner explained that this will be an optional program for staff that will not require funding from CLM.

Al Jones made a motion to add the Deferred Compensation Program as an additional benefit to staff and to authorize the CEO to sign all relevant forms and documents. Pete Beasley seconded the motion. Motion carried.

#### Mobile Unit Purchase

Rusty Skinner was happy to report that the large mobile unit sold, and that State and Federal approval has been received to purchase a van. A Request for Proposal will be distributed appropriately into the community. Once the bids have been received staff recommendations will be presented at the next meeting.

Jeff Chang made a motion to take steps for the procurement of a replacement mobile career center using federal funds. Pete Beasley seconded the motion. Motion carried.

#### Special District Performance Action

Al Jones made a motion to approve the letter grade report as the annual report needed to meet the requirements for the Uniform and Special District Accountability Act.

Charles Harris seconded the motion. Motion carried.

WIOA Plan

Cory Weaver explained that the plan has been discussed at all of the committee meetings. The Plan has been posted on the CLM website and is available in all centers for public feedback.

Pete Beasley made a motion to approve the local plan. Al Jones seconded the motion. Motion carried.

**PROJECT UPDATES**

**MATTERS FROM THE FLOOR**

None

**ADJOURNMENT**

There being no further business, the meeting was adjourned at 10:40 a.m.

**APPROVED:** \_\_\_\_\_

**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

**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.

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## **RECORD OF ACTION/APPROVAL**

**Executive Committee, Wednesday, November 20, 2024**  
**Career Center Committee, Thursday, November 7, 2024**

### **TOPIC/ISSUE:**

Release of the Invitation to Negotiate for the youth service provider contract.

### **BACKGROUND:**

CareerSource Citrus Levy Marion currently contracts a service provider to provide youth WIOA services. The current contract with Eckerd Connects is set to expire on June 30<sup>th</sup>, 2025.

### **POINTS OF CONSIDERATION:**

Procurement standards require that all service provider contracts are opened for bid at minimum, every four years. The last contract for youth services was established in 2021 and has been renewed the maximum times allowable (three renewals for a total of four service years).

Staff is currently updating the ITN release. Due to the extensive requirements of an ITN release it is important that adequate time is provided to all interested organizations to provide a response. Additionally, staff needs adequate time to review all submissions in order to conduct a proper evaluation of all responses.

### **STAFF RECOMMENDATIONS:**

Requesting approval for authority to release an ITN for Youth Services to solicit responses for program operation slated to begin July 1, 2025. The anticipated release date of the ITN will be December 12, 2024.

### **COMMITTEE ACTION:**

Career Center – Pat Reddish made a motion to approve the release of the ITN for Youth Services. Jorge Martinez seconded the motion. Motion carried.

### **BOARD ACTION:**



## **RECORD OF ACTION/APPROVAL**

### **Executive Committee Thursday, November 20, 2024**

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

Regional Planning Letter of Intent- Formal Submission

#### **BACKGROUND:**

The Board and Consortium approved an initial letter expression of intent to apply as a regional planning area (RPA). This request was approved by the CareerSource Florida Board. The attached is the formal request for RPA identification. The draft has been reviewed by the CEOs of each LWDA and will be submitted to their Boards in meeting this year. The formal RPA request is scheduled to be considered by the CareerSource Florida Board when it meets in February 2025.

The name proposed by the three CEO's is "Nature Coast Regional Planning Area."

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

Approval of the documents will allow us to develop a regional plan that brings increased services to our businesses and job seekers while capitalizing on coordination and cost sharing practices.

#### **STAFF RECOMMENDATIONS:**

Staff recommends approval

#### **COMMITTEE ACTION:**

#### **BOARD ACTION:**

## REGIONAL PLANNING AREA: Nature Coast

### Supporting Documentation

#### ***Single Labor Market:***

Three Metropolitan Statistical Areas (MSA) are included in the proposed regional planning area (RPA). These are:

- Gainesville MSA (Alachua, Bradford, and Levy Counties),
- Ocala MSA (Marion County); and
- Homosassa Springs MSA (Citrus County).

Lake City is a micropolitan statistical area covering Columbia County

The key Labor markets within the proposed region include the Ocala, Gainesville, Lake City, and Crystal River/Homosassa. The Ocala and Gainesville labor markets are the most diverse in terms of industry sectors. The Lake City micropolitan area also serves Live Oak/Suwannee County area. Levy County resident workforce commutes between Gainesville and Ocala. Madison County shows an influx and outflow of workers with Suwannee County. The inter-relationships of the workforce can be seen in the attached “*Inflow and Outflow Report for North Central Florida.*”

The “*Top Sectors Report for North Central Florida*” displays the top employers and targeted sectors for all counties within the proposed regional planning area. The chart shows the industry sector linkages for each county.

For the CareerSource Citrus Levy Marion Board and our Consortium elected officials to make an informed decision, CareerSource Citrus Levy Marion (CLM) issued an RFP to perform an analysis of the requirements for regional planning areas in WIOA. The firm Insytanalytics with Josh D. Shapiro, PhD., as the principal, was chosen. The report, dated September 2023, is attached and has been shared with CareerSource North Florida, and CareerSource North Central Florida for their review and consideration as we moved toward partnering in a regional planning area.

#### ***Common Economic Development Areas:***

The proposed RPA is covered by two major regional economic development organizations.

- The North Florida Economic Development Partnership (NFEDP) is a rural county organization which includes all of the counties in the proposed RPA, except Alachua, Marion and Citrus (former member).
- The Florida Economic Development Council (FEDC) is a statewide economic development organization. Its North Central Region includes all proposed RPA counties except Citrus.

CLM and NF are members of NFEDP and CLM is a member of FEDC. In addition, each local workforce board works closely with the local EDOs in each county. This includes support on a less formal basis, such as the provision of LMI and workforce training for economic development prospects to more formal relationships where the EDO is part of their business outreach strategy. EDOs are represented on each of the local workforce boards.

NF works with the Hamilton County Development Authority, the Madison County Development Council, the Suwanee County Development Council and the Taylor County Development Authority.

NCF works closely with the Greater Gainesville Chamber of Commerce and the North Florida Regional Chamber of Commerce. NCF contracts with both chambers as a vendor in providing Intermediary business Services, which includes providing information to all Chamber Members, all businesses seeking LMI, newly locating businesses and “selling” Work Based Learning to eligible businesses.

### ***Education and Training Resources: Public***

- University of Florida
- College of Central Florida
- North Florida College
- Gateway College
- Santa Fe College
- Big Bend Technical College
- RiverOak Technical College
- Withlacoochee Technical College
- Marion Technical College
- Alachua County School Board
- Bradford County School Board

- Citrus County School Board
- Columbia County School Board
- Dixie County School Board
- Gilchrist County School Board
- Hamilton County School Board
- Lafayette County School Board
- Levy County School Board
- Madison County School Board
- Marion County School Board
- Union County School Board
- Suwanee County School Board
- Taylor County School Board
- Rasmussen University
- North Florida Technical College

***Population Centers: (data source– U.S. Census, ACS, 2022 estimated population)***

- Madison, pop. 2,960, and Perry, pop. 6,970, are the two key population and industrial centers in the NF workforce region. Perry has Big Bend Technical College and a satellite campus of North Florida College, which is based in Madison.
- Live Oak is the home of RiverOak Technical College.
- Suwannee County is the largest county in CSNF area.
- Lake City, pop. 12,449, and Live Oak, pop. 7,034, are separated by I 75 and share workforce dynamics which also link NF. Both have strong manufacturing sectors. They also share a state rural incubator site.
- Jasper, the county seat of Hamilton County has a population of 3,661.
- Mayo is the largest city, pop. 1089, and the county seat of Lafayette County.
- Dixie County is a coastal county in the proposed RPA. Cross City serves as its county seat and has a population of 1,743.
- Trenton is the county seat of Gilchrist County and has a population of 2,070.
- Union County’s county seat is Lake Butler, pop. 1,950
- Chiefland, pop. 2,382, Bronson, pop. 1,196, and Williston, pop. 3,089, form the three population centers of Levy County. Chiefland’s retail and service growth draws residents of both Gilchrist and Dixie County both as consumers and employees. Bronson is the county seat, mid-way between Williston and

Chiefland. Williston's airport and adjacent industrial park serve as the industrial hub for Levy County.

- Starke, pop. 5,864, serves as the key center in Bradford County also drawing consumers from Union County. Starke is the center of two major north-south and east-west highways, US 301 and State Road 16.
- Gainesville and Alachua are key cities within Alachua County. Gainesville, pop. 145,214, home of the University of Florida. The University is an employment magnet for workers in all the surrounding counties- serving education, agriculture, healthcare, and manufacturing industries in both the surrounding counties as well as statewide. Alachua, pop. 10,773, adjacent to I 75 has both manufacturing and logistics employers.
- Inverness, pop. 7,766, Crystal River, pop. 3,485, are the key cities of Citrus County. Inverness, the county seat, is the governmental center. It is dissected by US41, a key north/south thoroughfare that also connects it to State Road 200 , the key eastern highway to Marion County. Crystal River is the hub of the Nature Coast eco-tourism, fishing and aquaculture sectors.
- Ocala, pop. 65,478, the county seat of Marion County is also the center of its manufacturing, logistics, healthcare and other industry sectors. It is the major commercial/retail center for Marion County. The equine industry which is spread through Marion County, is also served by businesses housed in the Ocala area.

Except for Alachua County, Citrus County and Marion County, the counties within the proposed RPA are rural and included in the *rural area of opportunity* designated counties of Florida.

### ***Commuting Patterns:***

The attached report by Dr. Shapiro and the visual maps details the commuting patterns between all the counties involved in the proposed regional planning area. A review of the map data shows how the commuting patterns interlace with workforces of the counties.

Relationships discussed in relevant sections.

### ***Industrial Composition and Location Quotients:***

See attached sector maps and Shapiro Report.

In addition to these designations, we have on-going collaborations that deal with common emerging labor market issues.

### Broadband Grant

CLM is the lead organization in a training grant that supports the rural broadband infrastructure funding in regions 6 and 7, and Levy County (Region 10), covering 11 rural counties in total. The implantation of this project along with the installation of high-speed fiber in these rural counties increases the capacity of telecommuting for these areas and provides residents access to more and better-quality jobs.

### Clam Farmer Disaster Re-employment Grant

As a result of Hurricane Idalia, the clam industry, a subsector of the agriculture industry, off Dixie and Levy counties has been devastated. The Location Quotients for Agriculture in Dixie and Levy counties are 5.18 and 7.17 respectively (source: JobsEQ). CLM and NCF are working to assist the workers and growers affected through a National Dislocated Worker Grant. For Dixie County, CLM is providing grant management and coordination of employment services. While Levy County has 110 growers (leaseholders) Dixie County has 13 according to data provided by FDACS. provides the outreach support but collaborates with CLM to reduce administrative costs and create a more efficient and consistent approach to employment services.

Industry Composition: Each of the regions in the proposed planning area have identified targeted sectors based on local industry composition, demand and future workforce needs. Feedback from businesses in these industries, along with partnerships with education providers, help us develop local talent and implement solutions for the workforce needs in each of our areas.

As expected, there is significant overlap in these sectors due to geographical similarities and shared commuting patterns. The chart below highlights where targeted sectors are shared and shows the competitiveness of each local area: **Labor Force Conditions:**

Industry	NAICS	Location Quotient (LQ)		
		CSNF (6)	CSCLM (10)	CSNCF (26)
Agriculture	11	6.87	1.97	1.69
Mining	21	0.50	0.50	0.32
Utilities	22	1.55	0.85	0.46
Construction	23	1.09	1.50	0.85
Manufacturing	31, 32, 33	1.63	0.79	0.50
Wholesale Trade	42	0.50	0.76	0.54
Retail Trade	44	1.31	1.59	1.07



Transportation, Warehousing and Logistics	48, 49	0.55	0.88	0.73
Finance and Insurance	52	0.41	0.50	0.56
Real Estate/Rental Leasing	53	0.40	1.07	0.98
Professional, Sci, Tech Services	54	0.30	0.52	0.67
Admin Support/Waste Mgmt/Remedication	56	0.74	0.92	0.88
Healthcare	62	0.72	1.05	1.39
Arts, Entertainment and Recreation	71	0.63	1.17	0.74
Hospitality	72	0.87	1.10	1.06
Public Administration	92	2.72	1.17	1.43

*Areas in yellow denote a shared targeted sector between areas.*

Manufacturing and Logistics are shared sectors of strength for the regions in the proposed planning area due largely to our ideal placement along the I-75 distribution route. Large distribution centers continue to seek space along this “industrial” zone which has led to an increased need for qualified candidates in these sectors, a need which continues to grow as more businesses move to the area.

Construction has boomed recently across the state of Florida, and particularly in this northern Florida corridor where lower home prices and reduced hurricane danger has many looking to relocate to this area both from South Florida and from out of State.

Healthcare and Professional/Scientific/Technical Services are also important industries in the proposed planning area, with each region having significant inflow/outflow to support the high-demand Healthcare sector in the metro areas through the north Florida corridor.

*Source: Location Quotient data by industry is derived by Chmura JobsEQ using the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics. Data is updated through 2023Q2 with preliminary estimates by Chmura updated to 2023Q3.*

**Geographic Boundaries:**

Key highways in the proposed region are Interstate 10 (I 10) and Interstate 75 (I 75) which provide critical East-West and North-South transportation corridors. In addition to

these US 441/301 provide north-south travel through the regions center. US 19 is the north-south roadway skirting the Gulf coastal area of the region. US 41 provides an east-west throughfare into Citrus County before turning north through Levy and into Alachua and Columbia County. State Road 40 links Florida's East and West Coasts, cutting through Ocala.

Gainesville Regional Airport provides convenient air service for residents in the eastern and central sections of the region. Ocala International airport provides service to the executive and equine needs of Marion County.

The eastern edge of the region is bounded by the St. Johns River, fed by springs in Marion County through its Silver River. The Suwanee River approximately dissects the region on its journey to the Gulf of Mexico, fed by the Santa Fe River. At the southern end of the regional, the Withlacoochee River travels west exiting at the boundary of Citrus and Levy County near the former Cross-Florida Barge Canal site. Port Citrus is located at the mouth of the Barge Canal/Withlacoochee River.

The RPA is home to a number of natural fresh water springs that connect to the rivers that flow through the area and create tourist and recreational sites..

***Special Relationships:***

CLM and NF have had an on-going relationship that reduces administrative and overall staff costs since 2011. CLM provides financial management for NF reducing the need for NF to have a finance staff. CLM costs cover the costs of CLM to provide those services, enabling CLM to have a stronger finance team while reducing its own finance costs. While exploring this arrangement, both CLM and NF determined that staff benefit costs, primarily driven by healthcare costs could be significantly reduced by allowing CLM to be the employer of record for its staff. This would also allow CLM, because of the group size, to gain better data to manage its healthcare costs.

The management team of CLM has, over the years, worked with the governments and boards of NCF as they have worked on transitioning their local management teams and boards.

These relationships have created natural working relationships that have also resulted in joint career fairs and on-going staff training situations.

<b>Request for Regional Planning Area Identification</b>	
Proposed Name of Planning Region: Nature Coast Regional Planning Area	
Local Workforce Development Boards included (Two or more contiguous boards):  <div style="text-align: center;">           LWDB 6 CareerSource North Florida            LWDB 26 CareerSource North Central Florida            LWDB 10 CareerSource Citrus Levy Marion         </div>	
Date of Submission:	
Contact Person Name(s): Rusty Skinner	Phone: 352-538-5445  Email Address: rskinner@careersourceclm.com

The request to be identified as a regional planning area (planning region) requires that the local workforce development boards have relevant relationships as evidenced by labor markets, economic development areas, education and training resources, population centers, commuting patterns, industrial composition, location quotients, labor force conditions, and geographic boundaries. By signing below, the chief local elected officials and the local workforce development board executive directors certify that the local areas request designation as a qualified regional planning area per CareerSource Florida Strategic Policy 2023.09.19.A.1. If the request for designation is approved, the local workforce development boards within the regional planning area will be required to engage in a regional planning process that will produce a Regional Plan to be added as an addendum to each local workforce development board plan per FloridaCommerce Regional Planning Instructions.

*{Remainder of page intentionally left blank.}*

*Signature Page*

<b>Local Workforce Development Board Executive Director “A”</b>	
Name:	
Signature:	
Date of Submission:	

<b>Chief Local Elected Official - LWDB “A”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “A”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “A”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “A”</b>	
Name and Title:	County:
Signature:	Date:

*Signature Page*

<b>Local Workforce Development Board Executive Director “B”</b>	
Name:	
Signature:	
Date of Submission:	

<b>Chief Local Elected Official - LWDB “B”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “B”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “B”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “B”</b>	
Name and Title:	County:
Signature:	Date:

*Signature Page*

<b>Local Workforce Development Board Executive Director “C”</b>	
Name:	Thomas E. Skinner Jr.
Signature:	
Date of Submission:	

<b>Chief Local Elected Official - LWDB “C”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “C”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “C”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “C”</b>	
Name and Title:	County:
Signature:	Date:



*Signature Page*

<b>Local Workforce Development Board Executive Director “D”</b>	
Name:	
Signature:	
Date of Submission:	

<b>Chief Local Elected Official - LWDB “D”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “D”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “D”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “D”</b>	
Name and Title:	County:
Signature:	Date:

## **Supporting Documentation for the Request for Regional Planning Area Identification**

Please provide information on the proposed regional planning area (planning region) to document relevant relationships between the local workforce development areas (local areas).

### **Single labor market:**

Describe any labor market relationships amongst the local areas within the proposed planning region. Per the U.S. Bureau of Labor Statistics, labor markets can be described as metropolitan statistical areas (MSAs) or micropolitan statistical areas ( $\mu$ SAs). Describe those areas located within the proposed planning region and any MSAs/ $\mu$ SAs that cross over multiple local areas, if applicable.

### **Common economic development areas:**

Describe any economic development area relationships amongst the local areas within the proposed planning region. Florida's economic development regions are an option for defining those economic development areas, but if your planning region has well-established regional economic development organizations, those are also acceptable to describe.

### **Education and training resources to administer activities under the Workforce Innovation and Opportunity Act:**

Utilizing the eligible training providers available amongst the local areas in the proposed planning region, describe any training providers that cross local area lines and their capacity.

### **Population centers:**

Describe the population centers within the planning region and any relevant relationships amongst those population areas as desired. The U.S. Census Bureau, American Community Survey is a potential data source for these population estimates.

### **Commuting patterns:**

Describe the commuting patterns between counties within the proposed planning region. This does not need to be comprehensive amongst all counties in the planning region; however, describe any major notable relationships amongst these counties. The U.S. Census Bureau, OnTheMap data is a potential data source for these commuting pattern estimates.

### **Industrial composition and location quotients:**

Describe the industrial composition of the local workforce development areas or counties included within the proposed planning region. A full breakdown of industrial composition for the regional planning area by county is not required; however, please highlight any major relationships or similarities in industrial composition. When possible, please indicate the location quotient at the county level for any highlighted industries. The industry share of county employment at a 2-digit NAICS level from the U.S. Bureau of Labor Statistics is an acceptable data source for these estimates.



**Labor force conditions:**

Describe any current labor force conditions that may be present across the proposed planning region. This can include disaggregated unemployment rates, labor force participation rates, or any other pertinent labor force conditions that the proposed regional planning area would like to consider. The U.S. Bureau of Labor Statistics is an acceptable data source for these estimates.

**Geographic boundaries:**

Describe any pertinent geographic boundaries present within the planning region, including major waterways, ports, or other natural boundaries. Confirm that the proposed planning region is made up of two or more contiguous local areas.