TREASURE COAST WORKFORCE CONSORTIUM AGENDA

Date: **Wednesday, March 11, 2020**
Time: **3:00 P.M.**
Place: **CareerSource Research Coast**
584 NW University Blvd., Suite 100
Port St. Lucie, Florida 34986
866-482-4473 ext. 421

https://global.gotomeeting.com/join/260743493
Dial 1 (877) 309-2073
Access Code: 260-743-493

1. Welcome & Attendance

** 2. Review and Approve Minutes from June 25, 2019 meeting

** 3. Nomination and Election of Chair and Vice-Chair

** 4. Review and Approve Board of Directors Membership Nomination - Jim Brann

** 5. Review and Approve 2020-2024 Local WIOA Plan

6. Other Business

- CSRC Annual Performance Report for PY 2018 - 2019
- DEO Presentation - CSRC Performance Overview for PY 2018 – 2019
- Next Consortium Meeting – Proposed Dates:
  - Wednesday, May 27, 2020 or
  - Thursday, May 28, 2020

**** Indicates possible voting item and open for public comment**

CareerSource RESEARCH COAST

AGENDA ITEM #2

AGENDA ITEM SUMMARY

TITLE:	Minutes from June 25, 2019 meeting
POLICY/PLAN/LAW:	Inter-local Agreement
ACTION REQUIRED:	Approve minutes of the June 25, 2019 Consortium meeting
BACKGROUND:	All meetings of the Consortium are recorded and the minutes approved at a subsequent Consortium meeting.
SUPPORTING MATERIALS:	Minutes from June 25, 2019
BOARD STAFF:	Brian Bauer, President/CEO bbauer@careersourcerc.com 866-482-4473 ext. 418

Meeting Summary:

- Reviewed and Approved Minutes from March 6, 2019
- Reviewed and Approved PY 2019/2020 Draft Budget
- Reviewed and Approved Board Member Recertification
- CareerSource Research Coast Request of the One-Stop Operator
- Individual Training Account (ITA) Waiver Request for PY 2019/2020
- Other Business

Members Participating by Teleconference:
Commissioner Doug Smith, Commissioner Tim Zorc, Commissioner Linda Bartz

Staff In Attendance:
Brian Bauer, Stacey Schaefer

Called To Order:
The meeting was called to order at 3:03 p.m.

Agenda Item 2 – Review and Approve Minutes from March 6, 2019:
Brian Bauer, President/CEO, called for a motion to approve the minutes as provided.

A motion was made by Commissioner Tim Zorc to approve the minutes as provided and seconded by Commissioner Doug Smith. The motion passed unanimously.

Agenda Item 3 – Review and Approve PY 2019/2020 Draft Budget:
Brian Bauer presented the draft budget to the Consortium. Funding remained consistent from the previous Program Year (PY). The draft budget will go before the Board of Directors for a vote at the June 26, 2019 meeting.

A motion was made by Commissioner Tim Zorc to approve PY 2019/2020 draft budget and seconded by Commissioner Doug Smith. The motion passed unanimously.

Agenda Item 4 – Review and Approve Board Member Recertification:
Brian Bauer announced the resignation of Waldo Tames, board member since 2010. Mr. Tames' last day to serve the board will be June 30, 2019 and will be recognized for his service to the Board at the Board of Directors June 26, 2019 meeting. The recertification of Board Members was presented to the Consortium.

A motion was made by Commissioner Linda Bartz and seconded by Commissioner Doug Smith to approve the recertification of Board Member(s). The motion passed unanimously.

Agenda Item 4 – CareerSource Research Coast Request Selection of the One-Stop Operator:
Brian Bauer explained the Board approved staff to move forward with requesting approval from the Governor and the Chief Elected Official allowing CareerSource Research Coast (CSRC) to serve as the One-Stop Operator (OSO) for the Local Workforce Board (LWBD) 20.

A motion was made by Commissioner Tim Zorc and seconded by Commissioner Linda Bartz to approve CSRC to serve as the OSO for LWDB20. The motion passed unanimously.

DRAFT

Agenda Item 5 – Individual Training Account (ITA) Waiver Request for PY 2019/2020:

Brian Bauer discussed the ITA Waiver per Florida Statutes 445.003 (3)(a)1, 50% of WIOA funds are to be spent on ITAs. CSRC has been assigned a 30% ITA Waiver amount based upon a "sliding scale". CSRC is requesting that the 25% Waiver be continued for PY 2019/2020. The Waiver of 25% allows CSRC 5% additional funding for supportive services for participants who are in training and in need of additional support.

A motion was made by Commissioner Doug Smith and seconded by Commissioner Tim Zorc to approve the ITA Waiver request of 25% for PY 2019/2020. The motion passed unanimously.

Agenda Item 5 – Other Business:

Brian Bauer presented the Consortium with the CSRC 2017-2018 Performance Overview as given by DEO. CSRC met or exceeded various performance goals.

Commissioner Linda Bartz asked Mr. Bauer to extend to staff that the Consortium appreciates their efforts.

With no further business to discuss, the meeting was adjourned at 3:35 p.m.

DRAFT

CareerSource RESEARCH COAST

AGENDA ITEM #3

AGENDA ITEM SUMMARY

TITLE: Election of Chairman and Vice Chairman

POLICY/PLAN/LAW: Inter-local Agreement

ACTION REQUIRED: Elect a Chairman and Vice Chairman from the three County Commission appointed representatives for the period 2020-2021.

BACKGROUND: At least yearly, the Consortium elects officers to facilitate meetings and work with the President/CEO to develop an agenda for the Consortium's work.

After the November 2019 elections, new local Chief Elected Officials (LCEO) were assigned to the TC Workforce Consortium thus leaving a vacancy for Chair, previously occupied by Linda Bartz.

SUPPORTING MATERIALS: None

BOARD STAFF: Brian Bauer, President/CEO
bbauer@careersourcerc.com 866-482-4473 ext. 418

CareerSource RESEARCH COAST

AGENDA ITEM #4

AGENDA ITEM SUMMARY

TITLE: Board of Directors Membership Nominations

STRATEGIC GOAL: Administration & Strategic Planning

POLICY/PLAN/LAW: Interlocal Agreement

ACTION REQUESTED: Approve New Membership Appointment and reclassification

BACKGROUND: The Local Workforce Development Board (LWDB20) shall have not less than twenty-one members who shall constitute the Board of Directors of the LWDB20. The membership will be appointed by the Consortium under the terms of the Interlocal Agreement creating the Board of Directors. Membership shall be composed of those members required or authorized by state and federal law, subject to appointment by the Consortium as provided for hereinabove. The term of membership shall be as set forth in said Interlocal Agreement. Vacancies in the Board membership shall be filled by appointment by the Consortium. The Board of Directors will reflect representation of the local community in terms of industry, race, age, gender, ethnicity, and other characteristics, including persons with disabilities. Mandatory Board members may designate a single, high-ranking designee with decision-making authority from their organization to represent them at Board of Directors and committee meetings, except for Executive Committee meetings. Designees shall have the authority to vote on Board of Directors matters provided the Board of Directors has approved the designees' appointment.

Nominated to fill current vacancies:
James Brann, President
The Porch Factory
Vacancy: Private Sector

STAFF RECOMMENDATION: Approve New Membership Appointment

SUPPORTING MATERIALS: Letters of Recommendations and Application for Board of Directors Membership

BOARD STAFF: Brian Bauer, President/CEO
bbauer@careersourcerc.com 866-482-4473 ext. 418

Building A Better Tomorrow.

TCBA Since 1974

TREASURE COAST BUILDERS ASSOCIATION

MARTIN · ST. LUCIE · INDIAN RIVER · OKEECHOBEE

TREASURE COAST BUILDERS ASSOCIATION

Michael Johnston
President

P. Scott McCracken
First Vice President

Mari Huff
Second Vice President

Steve Torres
Treasurer

Keith Frederick
Secretary

James Brann
Immediate Past President

Maddie Williams
Executive Director

December 18, 2019

Mr. Brian Bauer
President / CEO
Career Source Research Coast
584 NW University Blvd., Suite 100
Port St. Lucie, FL 34986

Dear Brian:

Please accept this letter of recommendation for James Brann, President of The Porch Factory. Jim has been a member of the Treasure Coast Builders Association since 2006 and is a dedicated advocate for education in the skilled trades and manufacturing sectors.

Jim has a vast amount of experience in the construction industry as a Certified General Contractor and also a HVAC and Plumbing Contractor. He has served in many leadership roles including as a TCBA Past President, Area Vice President for the Florida Home Builders Association and is currently the Chairman of our Skilled Trades Committee in collaboration with the Regional Workforce Task Force.

Jim's passion for promoting skilled trades has helped change the tone with young adults and their families to see that the construction industry provides great opportunities to have rewarding careers not just jobs. He has done this by helping to establish apprenticeship programs; hosting Career Days in the local high schools which include hands on activities and by leading a weeklong "boot camp" style event for graduating seniors. He also helps support our local in-school mentoring programs and the state wide Future Builders of America Foundation.

It is our recommendation that Jim Brann is an excellent candidate to further the mission of Career Source Research Coast as a member of your Board of Directors.

Sincerely,

Maddie Williams

Maddie Williams
Executive Director

772/336-8222
St. Lucie/Martin

772/562-8222
Indian River

863/467-2007
Okeechobee

772/461-4054
Fax

November 27, 2019

Mr. Brian K. Bauer
President/CEO
CareerSource Research Coast
584 NW University Blvd., Suite 100
Port St. Lucie, FL 34986

Re: Jim Brann, Porch Factory

Dear Mr. Bauer:

Please accept this letter of recommendation for Mr. Jim Brann. As owner/operator of the Porch Factory, Jim has demonstrated a great commitment to his community. In business since 2006, he has also demonstrated great resilience and leadership in maintaining his business.

I have personally served with Jim on committees of great importance to the community. He has proven to be a smart, capable and willing servant and clearly has the best intentions. He has great input and strives to find the best possible outcomes. Any board he serves is lucky to have him.

If you have any questions, please do not hesitate to contact me at 772.595.9999 ext. 314 or President@StLucieChamber.org.

Sincerely,

Terissa C. Aronson
President/CEO

CareerSource
RESEARCH COAST

APPLICATION FOR BOARD OF DIRECTORS MEMBERSHIP

Workforce Development Board of the Treasure Coast Inc., dba CareerSource Research Coast

PLEASE NOTE: Your application will remain active for one (1) year. Resumes may be included; however, the application *MUST* still be completed.

Today's Date: 12/30/2019

I. Name: James Brann

II. Organization/Employer Name: Occupation/ The Porch FActory

Title: President

Prior Occupation if retired: _____

Business Address: 705 N 39th Street, Fort Pierce FL 34947

Home Address: 2260 47th Ave, Vero Beach FL 32966

Business is located in: ☐ Indian River County ☐ St. Lucie County ☐ Martin County

Business Phone Number: 772-465-6772 Fax Number: 772-465-3252

Email Address: brannj@bellsouth.net Number of Employees in Company: 30

III. Demographic Data: Providing the following requested demographic information is voluntary. The information will be kept confidential as provided by law and will be used only in accordance with the law; refusal to provide the information will not subject the individual to any adverse treatment.

a. Gender ☐ Female ☑ Male

b. Race ☑ White ☐ African American or Black ☐ Asian
☐ Hispanic ☐ American Indian ☐ Other_____

c. Citizenship ☑ U.S. Citizen or Naturalized Citizen ☐ Lawfully Admitted Alien or Refugee

d. Veteran ☑ No ☐ Yes, Branch _____

e. Educational Degrees, College or University, Type of Degree, include Specialized Training:
High School - Shawsheen Valley Vocational Certified HVAC Degree.
Business Mgmnt Courses at IRSC.

IV. What is your interest in becoming a member of the CareerSource Research Coast Board?
To be a voice for the business commuity

V. What Special Experience/Training or Qualifications do you have that you could bring to the Board?
20 years running 2 business on the Treasure Coast both in the Construction / Manufacturing Fields.
State Certified Air Conditioning Lic. - State Certified Plumbing Lic.
State Certified Contractors Lic.

VI. Other Current or Previous Board Membership (include offices held or committee):
TCBA - Past President - Current Work Force Task force Chair
Sun Grove Montessori School Board - Past President

VII. Any Personal Information You Wish to Share with Us (Marital Status/Partner's Name/Children and Hobbies):

VIII. Conflicts of Interest (Any know or potential conflicts of interest which may be applicable to my membership on the CareerSource Research Coast) are as follows: If none, so indicate:
NONE

IMPORTANT INFORMATION:
Be advised that membership on the CareerSource Research Coast Board requires annual financial disclosure or the submission of other information to the State of Florida - Commission on Ethics.

James R Brann
Print Name

Signature

12/30/19
Date

Please return this application to:

CareerSource Research Coast
584 NW University Blvd.
Suite 100
Port St. Lucie, FL 34986

For CareerSource Research Coast Board Use Only

Date Received Application:	**Date Accepted at TCWC Meeting:**	**Date Accepted at Board Meeting:**	**Date Form 1 Sent:**
Date Resignation Letter Received:	**Date Board Accepted Resignation:**	**Date Form 1F Sent:**	**Date Renewed Membership:**

CareerSource RESEARCH COAST

AGENDA ITEM #5

AGENDA ITEM SUMMARY

TITLE: Draft WIOA Local Four-Year Plan for years 2020-2024

STRATEGIC GOAL: Administration & Strategic Planning

POLICY/PLAN/LAW: Workforce Innovation & Opportunity Act (WIOA): Role of LWDB's

ACTION REQUESTED: Information/Discussion Only

BACKGROUND:

WIOA requires each local workforce development board (LWDB) to develop and deliver to the state a comprehensive four-year plan. These plans must be submitted in partnership with the local chief elected official. Regulations require states and LWDBs to regularly revisit and recalibrate state plan strategies in response to changing economic conditions and workforce needs of the state (20 CFR, Unified and Combined Plans Under Title I of the Workforce Innovation and Opportunity Act, §676.135).

Local plans must address how LWDBs foster strategic alignment, improve service integration and ensure the workforce system is industry-relevant, responding to the economic needs of the local workforce development area and matching employers with skilled workers. Services described in local plans must lead to greater efficiencies, reduce duplication, and maximize financial and human resources. These plan guidelines require LWDBs to address current and future strategies and efficiencies to address the continuous improvement of Florida's workforce system and its focus on customer service excellence.

SUPPORTING MATERIALS: Draft WIOA 2020-2024 CSRC WIOA Local Plan

BOARD STAFF:

Brian Bauer, President/CEO
bbauer@careersourcerc.com 866-482-4473, Ext. 418

CareerSource Research Coast

Local Workforce Development Area 20

Tel 866-482-4473
Fax 877-223-5890

584 NW University Blvd, Suite 100
Port St. Lucie, FL, 34986

www.careersourcerc.com
Region20@careersourcerc.com

Date Submitted: March 16, 2020
Plan Contact: _Tracey McMorris. Vice President of Operations/COO

CONTENTS

INTRODUCTION 1

KEY DATES 2

PUBLIC COMMENT PROCESS 2

FLORIDA'S VISION FOR IMPLEMENTING THE WORKFORCE INNOVATION AND OPPORTUNITY ACT 4

ORGANIZATIONAL STRUCTURE 5

ANALYSIS OF NEED AND AVAILABLE RESOURCES 12

WORKFORCE DEVELOPMENT AREA VISION AND STRATEGIC GOALS 21

COORDINATION OF SERVICES 26

DESCRIPTION OF THE LOCAL ONE-STOP SYSTEM 34

DESCRIPTION OF PROGRAM SERVICES 42

INTRODUCTION

These guidelines provide direction for local plans submitted under Public Law 113-128, the Workforce Innovation and Opportunity Act (WIOA). WIOA requires each local workforce development board (LWDB) to develop and deliver to the state a comprehensive four-year plan. These plans must be submitted in partnership with the chief elected official. Regulations require states and LWDBs to regularly revisit and recalibrate state plan strategies in response to changing economic conditions and workforce needs of the state (20 CFR, Unified and Combined Plans Under Title I of the Workforce Innovation and Opportunity Act, §676.135).

The law emphasizes the importance of collaboration and transparency in the development and submission of local plans. Affected entities and the public must have an opportunity to provide input in the development of the plan. Local boards must make the plan available electronically and in open meetings to ensure transparency to the public.

Local workforce development boards provide leadership and should seek broad stakeholder involvement in the development of their local plan. Local elected officials, local workforce development board members, core program partners and mandatory one-stop partners are an integral part of the planning process. WIOA encourages an enhanced, integrated system by including core programs in its planning and performance requirements. Each plan addresses how the LWDB coordinates service delivery with core programs of the Division of Vocational Rehabilitation, the Division of Blind Services and the Division of Career and Adult Education.

Each plan is based on current and projected needs of the workforce investment system, with an increased emphasis on coordination and collaboration at all levels to ensure a seamless system for employers and career seekers, including those with disabilities. Local plans identify the education and skill needs of the workforce and the employment needs of the local area. Plans include an analysis of the strengths and weaknesses of services provided to address identified needs. Assessments include the best available information, evidence of effectiveness, and performance information for specific service models and a plan to improve program effectiveness by adopting proven or promising practices as a part of the local vision. LWDBs provide a comprehensive view of the systemwide needs of the local workforce development area.

Local plans address how LWDBs foster strategic alignment, improve service integration and ensure the workforce system is industry-relevant, responding to the economic needs of the local workforce development area and matching employers with skilled workers. Services described in local plans should lead to greater efficiencies, reduce duplication, and maximize financial and human resources. These plan guidelines require LWDBs to address current and future strategies and efficiencies to address the continuous improvement of Florida's workforce system and its focus on customer service excellence.

Local plans should align with CareerSource Florida's business and market-driven principles to be the global leader for talent. These principles include:

- Increasing the prosperity of workers and employers
- Reducing welfare dependency
- Meeting employer needs
- Enhancing productivity and competitiveness

KEY DATES ON OR BEFORE

Key Dates Sent to Local Boards……October 11, 2019
Local Plan Guidelines Issued ..... November 1, 2019
Labor Market Analysis Sent to Local Boards……..December 6, 2019
Local Plans Due ..... March 16, 2020
WIOA Statewide Unified Plan Due ..... March 2, 2020
WIOA Statewide Unified Plan Approved …..……..…..May 1, 2020
Local Plans Approved .....June 4, 2020
WIOA Program Year 2020 Begins.....July 1, 2020

PUBLIC COMMENT PROCESS

Prior to the date on which the local board submits a local plan, the local board shall:

(1) Make copies of the proposed local plan available to the public through electronic and other means, such as public hearings and local news media (WIOA §108(d)(1)).

(2) Provide a 30-day period for comment on the plan before its submission to CareerSource Florida, Inc., beginning on the date on which the proposed plan is made available, prior to its submission to the Governor (WIOA §108(d)(2)).

(3) Provide a description of the process used by the board to obtain input and comment by representatives of businesses and labor organizations for the development of the plan (WIOA §108(d)(2)).

(4) Describe efforts to coordinate with other workforce partners to obtain input into the development of the plan.

(5) Include, as an attachment with the plan to the Governor, any comments expressing disagreement or offering recommendations for continuous improvement, the LWDB's response to those comments, and a copy of the published notice (WIOA §108(d)(3)).

ATTACHMENTS

Please provide a link to the local board's website showing the attachments described below or upload attachments in a searchable PDF file with the local plan:

A. Executed Memoranda of Understanding for all one-stop partners (Section III(b)(2) and Section IV(a)(1)(d) of the State of Florida WIOA Unified Plan);

Please see Attachment A – Executed Comprehensive One Stop Career Center MOU-IFAs

B. Executed Infrastructure Funding Agreements with all applicable WIOA required partners (Section III(b)(2) and Section IV(a)(1)(d) of the State of Florida WIOA Unified Plan);

Please see Attachment A – Executed Comprehensive One Stop Career Center MOU-IFAs

C. Executed Interlocal Agreements (in cases where there is more than one unit of general local government);

Please see Attachment B – Interlocal Agreement establishing the Treasure Coast Workforce Consortium

D. Agreements describing how any single entity selected to operate in more than one of the following roles: local fiscal agent, local board staff, one-stop operator or direct provider of career services or training services entity will carry out its multiple responsibilities, including how it develops appropriate firewalls to guard against conflicts of interest. Also attach copies of any procedures on how roles are delineated to verify the firewalls are effective.

Please see Attachment C – One Stop Operator Request
Please see Attachment D – CSRC Administrative Plan
Please see Attachment E – Direct Services Extension

E. The current board member roster, meeting minutes for the local plan agenda item, discussions about the plan, and the board's vote on the local plan;

Please see Attachment G – Board Member Roster and Minutes.

F. Any comments submitted during the public comment period that represent disagreement with the local plan (Public Law 113-128, Section 108(d).

No comments were received.

G. If the local area includes more than one unit of general local government in accordance with WIOA sec. 107(c)(1)(B), attach the executed agreement that defines how parties carry out roles and responsibilities of the chief elected official;

Please see Attachment B – Interlocal Agreement establishing the Treasure Coast Workforce Consortium

H. A copy of the agreement executed between the chief elected official(s) and the Local Workforce Development Board;

Please see Attachment B – Interlocal Agreement establishing the Treasure Coast Workforce Consortium

I. A copy of the current by-laws established by the chief elected official to address criteria contained in §679.310(g) of the WIOA regulations;

Please see Attachment F – LWDB of the Treasure Coast Bylaws

FLORIDA'S VISION FOR IMPLEMENTING THE WORKFORCE INNOVATION AND OPPORTUNITY ACT

The implementation of WIOA ensures Florida has a business-led, market-responsive, results-oriented, and integrated workforce development system. The system fosters customer service excellence, ensures continuous improvement, and demonstrates value by enhancing employment opportunities for all individuals, including those with disabilities. This focused and deliberate collaboration among education, workforce, and economic development networks increases economic prosperity by maximizing the competitiveness of Florida businesses and the productivity of Florida's workforce.

Florida's strategic vision for WIOA implementation is realized by accomplishing these three goals:

- Enhance alignment and market responsiveness of workforce, education and economic development systems through improved service integration that provides businesses with skilled, productive, and competitive talent and Floridians with employment, education, training and support services that reduce welfare dependence and increase opportunities for self-sufficiency, high-skill and high-wage careers and lifelong learning.

- Promote accountable, transparent and data-driven workforce investment through performance measures, monitoring and evaluation that informs strategies, drives operational excellence, leads to the identification and replication of best practices and empowers an effective and efficient workforce delivery system.

- Improve career exploration, educational attainment and skills training for in-demand industries and occupations for Florida youth that lead to enhanced employment, career development, credentialing and post-secondary education opportunities.

(1) Chief Elected Official(s)

A. Identify the chief elected official(s) by name, title, mailing address, phone number and email address.

Treasure Coast Workforce Consortium

Chairman
Cathy Townsend, Commissioner
St. Lucie County Board of County Commissioners
2300 Virginia Avenue
Ft. Pierce, FL 34982
(772) 462-1408
townsendc@stlucieco.org

Vice-Chairman
Doug Smith, Commissioner
Martin County Board of County Commissioners
2401 SE Monterey Road
Stuart, FL 34996
(772) 882-5421
dsmith@martin.fl.us

Tim Zorc, Commissioner
Indian River County Board of County Commissioners
1801 27th Street, Building A
Vero Beach, Florida 32960-3365
(772) 226-1919
tzorc@ircgov.com

B. If the local area includes more than one unit of general local government in accordance with WIOA sec. 107(c)(1)(B), attach the executed agreement that defines how parties carry out roles and responsibilities of the chief elected official.

Attachment A – Interlocal Agreement among Indian River, Martin, and St. Lucie Counties establishing the Treasure Coast Workforce Consortium and the Workforce Development Board of the Treasure Coast.

C. Attach a copy of the agreement executed between the chief elected official(s) and the Local Workforce Development Board.

Attachment A – Interlocal Agreement among Indian River, Martin, and St. Lucie Counties establishing the Treasure Coast Workforce Consortium and the Workforce Development Board of the Treasure Coast.

D. Attach a copy of the current by-laws established by the chief elected official to address criteria contained in §679.310(g) of the WIOA regulations. At a minimum the by-laws must include:

Attachment F – By-Laws

i. The nomination process used by the chief elected official to elect the local board chair and local board members;

The Chairperson, Vice Chairperson and Treasurer shall be elected annually by the membership and shall serve a one-year term commencing July 1. The membership of the

Local Workforce Development Board (LWDB20) is appointed by the Treasure Coast Workforce Consortium in accordance with Section 107 of Title 1 of the WIOA and Section 9 of the Interlocal Agreement.

ii. The term limitations and how term appointments are staggered to ensure only a portion of memberships expire in each year;

The Chairperson and the Vice-Chairperson's terms shall be limited to two (2) terms and the Treasurer shall be limited to four (4) terms. The terms of the officers are limited to two (2) terms consecutively in the same role. There are no limitations on the number of terms not in sequence or in different roles. As is outlined in the Interlocal Agreement, Section 9, members shall be appointed for fixed and staggered terms and may serve until their successors are appointed. After the initial staggered terms, terms of LWDB20 Board members shall be three (3) years. Any vacancy in the membership of LWDB20 shall be filled in the same manner as the original appointment. Members may be reappointed for successive terms if the sponsoring organization agrees. Any member of LWDB20 may be removed for cause in accordance with procedures established in the By-Laws.

iii. The process to notify the chief elected official of a board member vacancy ensuring a prompt nominee;

Board members are required to submit, in writing, notice of his/her official resignation from the Board of Directors. The notice is delivered to the President/CEO who serves and the Secretary to the Board of Directors. Any vacancy shall be filled by appointment from the Treasure Coast Workforce Consortium. Potential membership replacement is an individual nominated by general-purpose business organizations, such as chambers of commerce, economic development agencies, business councils and/or business trade organizations.

iv. The proxy and alternative designee process used when a board member is unable to attend a meeting and assigns a designee per requirements at §679.110(d)(4) of the proposed WIOA regulations;

Board members may designate a single, high-ranking designee with decision-making authority from their organization to represent them at Board and committee meetings except for Executive Committee. Designees shall have the authority to vote on Board matters provided the Board of Directors have approved the designees' appointment.

v. The use of technology, such as phone and web-based meetings used to promote board member participation;

LWDB20 utilizes web and video-based online technology to provide video/teleconferencing options for all Committee, Board and Consortium meetings. This technology allows for screen sharing, web camera participation and active discussion via telephone and/or computer, telephone combination.

vi. The process to ensure board members actively participate in convening the workforce development system's stakeholders, brokering relationships with a diverse range of employers, and leveraging support for workforce development activities; and,

The composition of the private business members of the Board of Directors reflects the industries/sectors in demand for the Local Workforce Development Area (LWDA). Private business Board members represent healthcare, manufacturing, construction trades, logistics, apprenticeships, financial services, retail, research, hospitality and information technology. These above-mentioned members are affiliated with industry associations and attend a wide variety of meetings throughout the LWDA where they provide information about the programs and services CSRC can provide to their businesses.

Private business members also take a lead role in all LWDB20 committees. These committees include: Executive, Programs and Services and the Youth Council. The Board Chairperson must be from the private business sector. Agenda items for committee and full Board of Directors meetings are structured under categories of our strategic plan and require input and feedback from Board members.

Executive Committee members attend workforce related meetings and conferences with staff, such as the CareerSource Florida, Board of Directors and committee meetings, the National Association of Workforce Boards (NAWB) Conference and the annual Workforce Professionals Summit. Other Board members are invited to attend other state and national conferences with staff that pertain to their subject matter expertise. Board members are also called upon to assist staff in addressing community issues as they are presented to CSRC. These Board members attend community meetings along with staff to address issues, broker relationships and provide support. Many times, these issues result in "special projects" where the Board member involved becomes the lead voice in promotion of the service delivery.

vii. Any other conditions governing appointments or membership on the local board.

E. Describe how the chief elected official is involved in the development, review and approval of the local plan.

The President/CEO, in collaboration with staff, develops the plan through multiple workgroup meetings. Additionally, the President/CEO, along with executive leadership, meets, discusses and coordinates efforts with named partner organizations within the plan. The President/CEO is responsible for moving the plan through Committee, Board of Directors and Consortium approval. As one of the Treasure Coast Workforce Consortium's primary responsibilities, the members review and approve the local plan for submission to the governor.

(2) Local Workforce Development Board (LWDB)

A. Identify the chairperson of the Local Workforce Development Board by name, title, mailing address, phone number and email address. Identify the business that the chair represents.

Robert Cenk, Vice President
Homecrete Homes, Inc.
2162 NW Reserve Park Trace
Port St. Lucie, FL 34986
(772) 873-6707
bcenk@homecretehomes.com

B. If applicable, identify the vice-chair of the Local Workforce Development Board by name, title, mailing address, phone number and email address. Identify the business or organization the vice-chair represents.

Pam Burchell, Director of Human Resources
Indian River Medical Center
1000 36th Street
Vero Beach, FL 32960
(772) 567-4311 ext. 2343
pamela.burchell@irmc.cc

C. Describe how the LWDB was involved in the development, review, and approval of the local plan.

To ensure comment and input into the development and review of the local plan, the plan is reviewed by the Youth Council, Programs and Services and Executive Committees of LWDB20 in open, public meetings. Comments and responses from LWDB20 committees are reviewed and integrated into the plan. The local plan is advertised to the public through the LWDA's news affiliates and placed on the www.careersourcerc.com website for thirty-day public comment. Local elected officials, all Board members, and members of the LWDA's economic development organizations, labor organizations, local education providers, core program partners and mandatory one-stop partners are notified of access to the plan and provided the opportunity to offer input into the plan. Comments and suggestions from Board members, members of the above-mentioned organizations and the general public are reviewed and integrated into the local plan, as appropriate.

(3) Local Grant Subrecipient (local fiscal agent or administrative entity)

A. Identify the entity selected to receive and disburse grant funds (local fiscal agent) if other than the chief elected official. WIOA section 107(d)(12)(B)(1)(iii); 20 CFR 679.420

LWDB20, CareerSource Research Coast, serves as the fiscal agent.

Brian K. Bauer, President/CEO
The Workforce Development Board of the Treasure Coast, Inc.
d/b/a CareerSource Research Coast
584 NW University Boulevard, Suite 100
Port St. Lucie, Florida 34986
(866) 482-4473

B. Identify the entity selected to staff the LWDB (commonly referred to as the administrative entity) and assist it in carrying out its responsibilities as a board organized under WIOA. (May be the same as the fiscal agent). 20 CFR 679.430

LWDB20, CareerSource Research Coast, serves as the administrative entity.

Brian K. Bauer, President/CEO
The Workforce Development Board of the Treasure Coast, Inc.
d/b/a CareerSource Research Coast
584 NW University Boulevard, Suite 100
Port St. Lucie, Florida 34986
(866) 482-4473

C. Identify if a single entity is selected to operate in more than one of the following roles: local fiscal agent, local board staff, one-stop operator or direct provider of career services or training services, and describe how the entity will carry out its multiple responsibilities, including how it develops appropriate firewalls to guard against conflicts of interest as described in CareerSource Florida strategic policy 2012.05.24.A.2 – State and Local Workforce Development Board Contracting Conflict of Interest Policy.

CareerSource Research Coast (CSRC) serves as the local fiscal agent, administrative entity and the One-Stop Operator for LWDB20. CSRC was designated as the Direct Provider of Workforce Services on January 1, 2009 and has been granted extensions to this designation through June 30, 2020. On September 12, 2019, the CareerSource Florida Board of Directors approved CSRC to serve as the One-Stop Operator in accordance with CSRC local internal control, conflict of interest policies and procedures pursuant to 20 CFR 679.430. The appropriate firewalls established by the Board of Directors to guard against any conflict of interest are described in detail in the CSRC Administrative Plan. The established firewalls have been validated through the most recent, PY 2019-2020, Internal Control Questionnaire; independent monitoring performed by Taylor, Hall, Miller and Parker, PA; and the Department of Economic Opportunity (DEO) annual monitoring for both fiscal operations and programs.

(4) One-Stop System

A. Describe the local one-stop system (including the number, type and location of the comprehensive center(s)[1], and other service delivery points).

CSRC operates four full-service Career Centers that provide Wagner Peyser, WIOA Adult/Dislocated Worker/Youth, Trade Adjustment Assistance (TAA), Migrant Seasonal Farmworker (MSFW), Veterans Services, Welfare Transition (WT) programs and Supplemental Nutrition Assistance Program (SNAP). Two mobile units are available to be deployed for outreach activities, community and hiring events, Rapid Response, and other services as needed.

CSRC Career Centers are situated at key locations in each of the counties in the LWDA, with the largest and most central location designated as the comprehensive center. At the Comprehensive One Stop Center, the Division of Vocational Rehabilitation, Division of Blind Services, Senior Community Service Employment Program, Adult Education and Family Literacy Act, and Post-Secondary Career and Technical Education have a physical presence in the Center. The Community Services Block Grant and Youth Build are available virtually.

Indian River County Career Center
1880 82nd Ave
Vero Beach, FL 32966

Garden City Career Center
2102 Avenue Q
Fort Pierce, FL 34950

St. Lucie County Career Center
(Comprehensive Career Center)
584 University Blvd Suite 300
Port St. Lucie, FL 34986

Martin County Career Center
710 SE Central Parkway
Stuart, FL 34994

CSRC's WIOA Youth program operates as "Youth Connections". WIOA Youth services are available at the Garden City and Martin County Career Centers. To better meet the needs of youth program participants in Indian River and St. Lucie counties, CSRC has two locations, specifically targeted to WIOA Youth services.

The Youth Connections site serving Indian River County is co-located within Treasure Coast Technical College. Situated in an underprivileged area in the City of Vero Beach, it is easily accessible by public transportation routes.

CSRC Youth Connections
4680 28th Court
Room 2-201
Vero Beach, Florida 32967

[1]A comprehensive center is one in which all core and required partner services are available either physically at the location or by direct linkage through technology to a program staff member who can provide meaningful information or services. See Training and Employment Guidance Letter No. 16-16 (TEGL 16-16) and Training and Employment Guidance Letter No. 16-16, Change 1 (TEGL 16-16, Change 1). **Additionally, Memorandums of Understanding (MOU) and Infrastructure Funding Agreements (IFA) must be executed for all partners connected to the comprehensive centers.**

The Port St. Lucie Youth Connections site is adjacent to the St. Lucie County Career Center and has a separate entrance and office area designed to be more inviting to young adults:

CSRC Youth Connections
584 NW University Boulevard, Suite 400
Port St. Lucie, Florida 34986

B. Identify the days and times when service delivery offices are open to customers. Customers must have access to programs, services and activities during regular business days at a comprehensive one-stop center.

All Career Centers are open Monday through Friday from 8:00 am to 4:30 pm, excluding Thursday when offices open to customers beginning at 9:00 am. Career Center staff meet each Thursday from 8:00 am to 9:00 am to discuss progress, address issues and receive important updates pertinent to our operations.

All CSRC Youth Connections offices are open Monday through Friday from 8:00 am to 5:00 pm.

C. Identify the entity or entities selected to operate the local one-stop center(s).

CareerSource Research Coast
584 NW University Boulevard, Suite 100
Port St. Lucie, FL 34986
866-482-4473

D. Identify the entity or entities selected to provide career services within the local one-stop system.

All direct services, excluding youth, are provided by CSRC:

Brian Bauer, President/CEO The Workforce Development Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast
584 NW University Boulevard, Suite 100
Port St. Lucie, Florida 34986
(866) 482-4473

WIOA Youth services are provided by

Richard Semancik, Chief of Program Development
Eckerd Youth Alternatives
100 N. Starcrest Drive
Clearwater, Florida 33765

E. Identify and describe what career services are provided by the selected one-stop operator and what career services, if any, are contracted out to service providers.

The role of the One Stop Operator, as defined by CSRC, does not provide career services.

With the except of WIOA Youth, CSRC Career Center staff provides the complete array of career services available under the required WIOA Title I and Title III programs including, but not limited to:

- Career counseling
- Skills/Interest/Proficiency assessments
- Labor market information
- Employability skills workshops
- Career training
- Job search assistance

- Referrals to jobs
- Follow up services

Career services available under the WIOA Youth program “Youth Connections” are provided by a competitively procured, sub-recipient service provider, Eckerd Youth Alternatives. WIOA Youth services include, but are not limited to:

- Work-Readiness Training: Y.E.S.S. (Youth Employment Success Solutions) soft skills and pre-employment training, financial literacy education, labor market and employment information.
- Occupational/Vocational training opportunities
- Work-Based learning opportunities: Work experiences, including summer or year-round opportunities, Pre-Apprenticeship programs, internships and job shadowing.
- Incentives based upon completion points
- Support Services As needed by participant
- GED/High School Diploma Attainment Assistance
- Mentoring
- Job Placement
- Post-Secondary Education Support

F. Pursuant to the CareerSource Florida Administrative Policy 093 - One-Stop Career Center Certification Requirements, provide the required attestation that at least one comprehensive one-stop center in the local area meet the certification requirements.

CSRC hereby certifies that one Comprehensive One-Stop Center in our LWDA meets the One-Stop Certification requirements:

1. Provides the career services described in section 134(c)(2), WIOA
2. Provides access to training services as described in section 134(c)(3), WIOA, including serving as the point of access to training services for participants in accordance with section 134(c)(3)(G), WIOA.
3. Provides access to the employment and training activities carried out under section 134(d), WIOA, if any.
4. Provides access to programs and activities carried out by one-stop career center partners.
5. Provides access to the data, information, and analysis described in section 15(a) of the Wagner-Peyser Act and access to all job search, placement, recruitment, and other labor exchange services authorized under the Wagner-Peyser Act.
6. Provides knowledgeable staff, including trained career counselors, as outlined in Administrative Policy 92, available for assistance.
7. Provides access to the general public during regular business days (Monday through Friday).
8. Provides physical and programmatic access to individuals with disabilities.

ANALYSIS OF NEED AND AVAILABLE RESOURCES

(1) Please provide an analysis (or existing analysis pursuant to WIOA section 108(c)) of the regional economic conditions, which must include:

A. Information on existing and emerging in-demand industry sectors and occupations; and

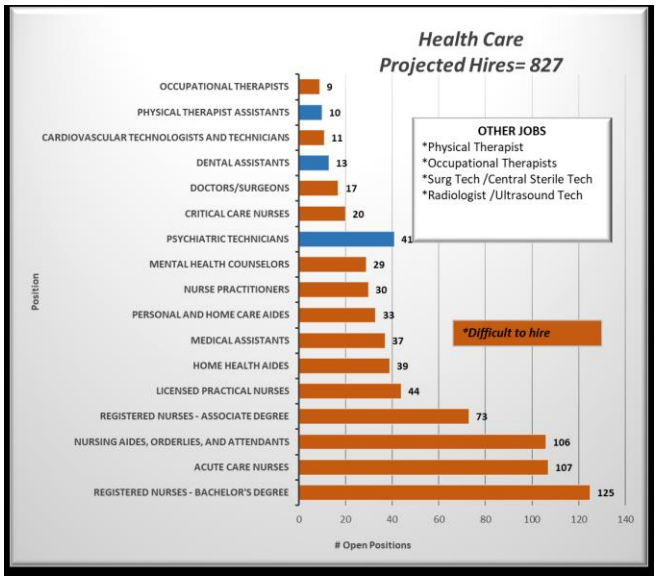
The largest sector in the CSRC LWDA is Health Care and Social Assistance, employing 35,635 workers. The next-largest sectors in the LWDA are Retail Trade (30,763 workers) and Accommodation and Food Services (21,207). High location quotients (LQs) indicate sectors in which a LWDA has high concentrations of employment compared to the national average. The sectors with the largest LQs in the LWDA are Arts, Entertainment, and Recreation (LQ = 1.57), Construction (1.43), and Agriculture, Forestry, Fishing and Hunting (1.42).

Sectors in the LWDA with the highest average wages per worker are Management of Companies and Enterprises ($106,049), Utilities ($96,252), and Finance and Insurance ($81,281). Sectors with the best job growth (or most moderate job losses) over the last 5 years are Health Care and Social Assistance (+5,611 jobs), Construction (+4,311), and Accommodation and Food Services (+4,071).

Over the next 5 years, employment in the LWDA is projected to expand by 18,328 jobs. The fastest growing sector in the LWDA is expected to be Health Care and Social Assistance. The strongest forecast by number of jobs over this period is expected for Health Care and Social Assistance (+3,195 jobs), Construction (+872), and Accommodation and Food Services (+794).

According to the area wide Skill Gap Analysis survey conducted in 2019, employers responding to the survey reported approximately 1,882 open positions that they expect to fill over the next 24 months. Several local hiring trends are counter to national trends and should be considered when determining workforce training strategies to assure talent will continue to flow to the local market. Here are a few Jobs trends identified by the study:

Health Care



Employment in Health Care occupations is projected to grow 14 percent from 2018 to 2028, much faster than the average for all occupations, adding about 1.9 million new jobs. Health Care occupations are projected to add more jobs than any of the other occupational groups. This projected growth is mainly due to an aging population, leading to greater demand for Health Care services. (US Dept of Labor, 2019). Locally, health care employment totals more than 35,834 jobs, (DEO Florida, 2019) more than 20% of private sector jobs in the area. Registered Nurses, represents the largest percent of health care positions, earns an average annual wage in excess of $61,320 which is 81% of the national average of $75,570. (St. County Lucie EDC Major Employers, 2019)

The largest contributor to health care employment in the area are the area hospitals. Health Care employers projected 827 new hires of the next 24 months. The positions identified by employers as difficult to fill are also expected to grow between 2020 and 2028 at rates higher than the norm, compounding the recruitment process. The most in demand and difficult to hire position in Health Care is Registered Nurses, representing over 15% of occupations employed by this industry. (CareerSource Research Coast, 2019). The number of projected positions locally that are difficult to fill, and projected national growth include:

• Registered Nurse - Bachelors and Associates Degrees =198 positions/12% growth
• Acute Care Nurses = 107 positions /28% growth
• Home Health Aides = 39 positions /36% growth
• Nursing Aides and Orderlies and Attendants = 106 positions /9% growth
• Surg Tech/Central Sterile Techs = 9% growth

Allied Health Care positions are also on the rise and difficult to fill. These positions are fewer in number in the local workforce, generally requiring advanced training/degrees, but critical to the care and recovery of the patient. These positions were identified during interviews and focus groups. The projected national growth data was available; however, the Open position data was not.
• Occupational Therapist = 33% growth
• Physical Therapist = 22% growth
• Radiologist and Ultrasound Techs = 9% growth

Manufacturing/Marine/Aviation

The manufacturing industry in the LWDA currently has a more positive outlook than the national picture. National conditions include the resolution of the tariff war with China which will have an impact on aircraft manufacturers, companies using plastics, and utility vehicle production. Nationally, employment in production occupations is projected to decline 5 percent, with a loss of about 429,500 jobs from 2018 to 2028. Technological advancements are expected to continue replacing many of the manufacturing workers that make up a large share of the production occupations. Nationally, fewer workers are expected to be needed in the manufacturing sector as many processes have become computer controlled. (US Dept. Labor, 2019) The median annual wage nationally for production occupations was $35,070 in May 2018, which was lower than the median annual wage for all occupations of $38,640. (US Dept. Labor, 2019) Locally, manufacturing employment in the study region currently totals more than 9,560 jobs, (DEO Florida, 2019) more than 5% of private sector jobs in the area. Employees in manufacturing, with certifications and degrees earn an average annual wage in excess of $63,781 locally and $85,507 nationally.

The largest contributors to manufacturing employment in the LWDA are boats, aviation/aerospace, food processing, fabricated metals, machinery, specialized motor vehicles, computers/electronics and plastics. (St. Lucie EDC Major Employers, 2019).

Employers reported plans to fill 342 positions in Manufacturing, Aviation and Marine industries over the next 24 months. Assembler and Fabricators represent a significant number of jobs over the next 24 months.

Locally, companies reported a high demand for positions that are declining on a national level yet are difficult to find qualified talent locally to fill. These positions are:

• Assemblers and Fabricators, Fiberglass Laminators, Metal & Plastic=85 positions/declining 11%
• Welding = 36 positions / 3% growth but lower than national average
• CNC Machine operators = 32 positions / declining 8%

Employers prefer post-secondary training either through an Apprenticeship or attendance at a technical program or both for the positions listed above.

Jobs in Demand LWDA 20

Factors	Welder	Computer-Controlled Machine Tool Operators, Metal and Plastic	Assemblers/ Fabricators	Fiberglass Laminators and Fabricators
Typical Entry Level Education*	HS	HS Some post secondary	HS or equivalent	
Work Experience in related Occupation*	None	None	None	
On-the-job Training*	Moderate-term OJT or Apprenticeship	Moderate-term OJT	Moderate-term OJT	
National Outlook*	3%(slower than average)	-8% decline	-11% decline	
Hires in Next 24 months**	36	32	85	
% of local workforce***	9.70%	9.50%	7.06%	16.50%
# Employed***	155	75	636	220

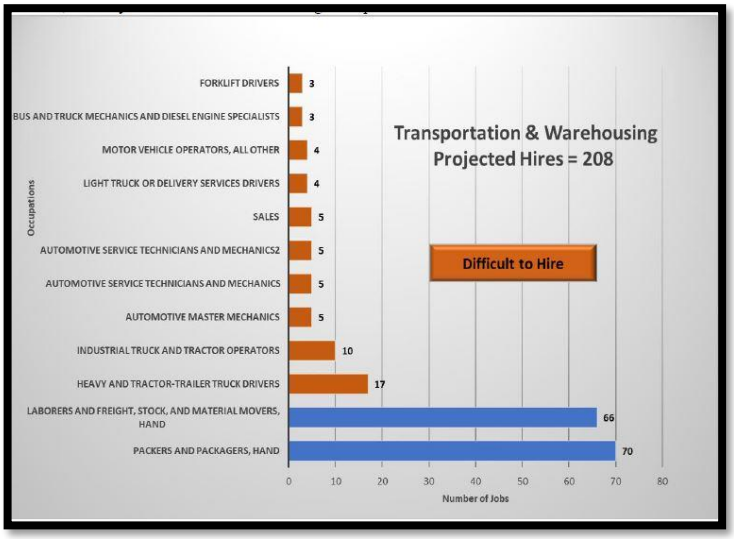
* Bureau of Labor Statistics, U.S. Department of Labor, Occupational Outlook Handbook, Assemblers and Fabricators, on the internet at https://www.bls.gov/ooh/production/assemblers and fabricators.htm (visited November 12, 2019)
**Treasure Coast Skills Gap Study, 2019
***Emsi Q4 2019 Data Set, Industry Snapshot, November 2019, CareerSource Research Coast

Skilled Trades

Employment of construction and extraction occupations is projected to grow 10% Locally, the workforce employed in construction in the LWDA currently totals more than 15,740 jobs, more than 9% of private sector jobs in the area (DEO, 2019). The largest contributors to Skilled Trades/Construction employment in the area are Heavy and Civil Engineering construction, welding, building, roofing, precast specialties, fabricators, and shutters (St. Lucie EDC Major Employers, 2019). Employers reported plans to fill 505 positions in Skilled Trades industry over the next 24 months. Skilled Trades are seeking skilled craftsmen to support the increase in construction in the area. The number of projected positions locally that are planned, and projected national growth include:

- Construction Laborer = 199 positions / 11% growth
- Electricians = 100 positions /10% growth
- Electricians Helpers = 77 positions / 11% growth
- HVAC = 15positions /3% growth
- Plumbers = 8 positions /14% growth
- Cement Masons = 6 positions /11% growth
- Carpenters = 1 position / 8% growth

The highest in-demand occupation reported in the survey, Construction Laborers, is projected to grow 11% from 2018 to 2028, much faster than the average for all occupations. Laborers and helpers work in all fields of construction, and demand for these workers should mirror the level of overall construction activity. Electricians and Electrician Helpers are in high demand locally and are expected to grow nationally faster than average. While Electricians will require a high school diploma and On-The-Job-Training (OJT) through an Apprenticeship to learn the profession, Helpers will only require the former. Several Technical Schools offer Career & Technical Education (CTE) programs to support training for the occupation.



Logistics/Transportation and Warehousing

The most difficult jobs to fill, according to the Skills Gap Survey are Heavy and Tractor Trailer truck drivers requiring CDL certification, the training for which can vary in length based on the provider. There will be a moderate growth (5%) in the occupation through 2028. Finding drivers with enough hours on the road is a challenge. Long haul drivers are converting to last-mile drivers to avoid the time away from home; however, they quickly find the loss of income a challenge and many drivers return to long-haul driving. Last mile drivers, on the other hand, have a lower turnover rate, many coming from the long-haul driver pool. The turnover cycle will continue because of higher compensation for long-haul drivers will many times result in the last-mile driver heading back to the long-hauling. Master Mechanics and Automotive Mechanic Technicians are also expected to grow modestly at 4% through 2028. These jobs require long-term on the job training; however, employers are increasingly preferring applicants who have completed postsecondary training programs in diesel engine repair. In addition, industry certification also increasing in importance.

B. The employment needs of employers in those industry sectors and occupations (WIOA §108(b)(1)(A)).

Over the last 5 years the population in the LWDA (Indian River, Martin, and St. Lucie counties) grew by 63,043 and is projected to grow by 44,846 over the next 5 years. As of November 2019, the population of LWDA 20 was 650,812. The area has a total regional employment of 224,795, reflecting a growth of 25,884 jobs in the past 5 years and with projected growth of 18,328 jobs in the next 5

years. Regional average earnings per job are $18.8K below the national average earnings of $67.3K per job.

Takeaways

- As of 2019 the LWDA's population **increased by 10.7%** since 2014, growing by 63,043. Population is expected to **increase by 6.9%** between 2019 and 2024, adding 44,846.
- From 2014 to 2019, jobs **increased by 13.0%** in Research Coast from 198,911 to **224,795**. This change **outpaced the national growth rate of 6.9% by 6.1%**. As the number of jobs increased, the **labor force participation rate decreased from 52.4% to 51.8% between 2014 and 2019**.
- Concerning educational attainment, **15.7% of the selected regions' residents possess a bachelor's degree** (3.1% below the national average), and **9.7% hold an associate degree** (1.7% above the national average).
- The top three industries in 2019 are Restaurants and Other Eating Places, Education and Hospitals (Local Government), and General Medical and Surgical Hospitals.

The projected employment needs of employers in demand industry sectors are: education and health services gaining approximately 6,800 jobs; leisure and hospitality gaining 4,550 jobs; professional and business services gaining about 2,600 jobs; trade, transportation and utilities gaining about 2,300; and construction with about 2,000 more jobs expected to be created over the next eight years.

Projected occupations (which are within industry sectors) that will make gains are food preparation and services, construction, healthcare practitioner, office and administrative support, and transportation and material moving.

Based on the above, and other data analyzed by CSRC's Strategic initiatives team, CSRC has identified six industries to target for sector strategy initiatives:

- Healthcare
- Manufacturing
- Skilled Trades
- Logistics
- Hospitality
- Professional & Business Services

(2) Please provide an analysis of the knowledge and skills needed to meet the employment needs of the employers in the local area, including employment needs in in-demand industry sectors and occupations (WIOA §108(b)(1)(B)).

The flow of qualified talent into the workforce is the key to a successful economy. The ability to match the skills of talent entering the workforce and the rapidly changing skills needed by employers to remain competitive remains a challenge for LWDB 20 employers.

Health Care Skills - Recent grads are entering the Health Care more comfortable with technology as a primary source of communication and lack the necessary interpersonal skills to communicate with the patients. Critical Thinking continues to be the top skill Health Care employers are seeking, along with Interpersonal, Oral Communications and Collaboration. Time Management was #10 on the list in 2016.

Manufacturing Skills - Motivation was identified again as the top skill that they look for in new hires. Employers reported during the focus groups and interviews that they would hire a motivated individual and provide on-the-job training. Companies like to find talent internally however, some employers reported that the Motivation to hire from within presents challenges to the employer when the employees chose to not accept an increase in salary/more hours because it would result in a reduction or loss of public benefits for the employee, such as child care services.

Skilled Trades Skills - Problem Solving, Time Management, and Motivation were identified again as the top skills that employers were seeking in new hires. However, concern was expressed by training programs that applicants with industry-specific training, High School and Post-Secondary, are hired by employers for the same pay rate as the applicants hired "off-the-streets" without any training. High School and Post-Secondary training programs market to the applicants that they will have improved job prospects with training, only to find that they enter the workforce at the same pay rate as co-workers with only on-the-job training. The flow

of talent from the training programs to the companies seeking to hire is the key to assuring that trained graduates are hired at area companies. Training providers are concerned that students will not enroll in the training if they do not see the financial benefit.

Logistics/Transportation & Warehousing13 Skills - Time Management, Collaboration, and Motivation are key skills required in this industry to be successful. Logistics attracts talent from other related industries including hospitality, that bring the sales skills needed in the to the distribution of products. Finding applicants that have experience meeting performance standards is a challenge.

Health Care		Manufacturing		Skilled Trades		Trans & Warehousing	
Skill	Weighted Average	Skill	Weighted Average	Skills	Weighted Average	Skills	Weighted Average
Critical Thinking	4.57	Motivation	4.53	Problem solving	4.33	Time management	4.67
Interpersonal	4.50	Time manageme	4.2	Time management	4.33	Collaboration	4.5
Oral communication	4.50	Problem solving	4.07	Motivation	4.33	Motivation	4.5
Time management	4.50	Collaboration	4.07	Experience w/	4.13	Oral communication	4.5
Collaboration	4.43	Interpersonal	3.93	Oral communication	4.13	Problem solving	4.33
Motivation	4.43	Cultural Fit	3.93	Critical Thinking	4	Decision making	4.17

(3) Please provide an analysis of the workforce in the local area, including current labor force employment (and unemployment) data, information on labor market trends, and the educational and skill levels of the workforce in the local area, including individuals with barriers to employment (WIOA §108(b)(1)(C)).

LWDB 20 Workforce Characteristics

Millennials

Your area has 98,731 millennials (ages 25-39). The national average for an area this size is 131,464.

Retiring Soon

Retirement risk is high in your area. The national average for an area this size is 185,100 people 55 or older, while there are 274,134 here.

Veterans

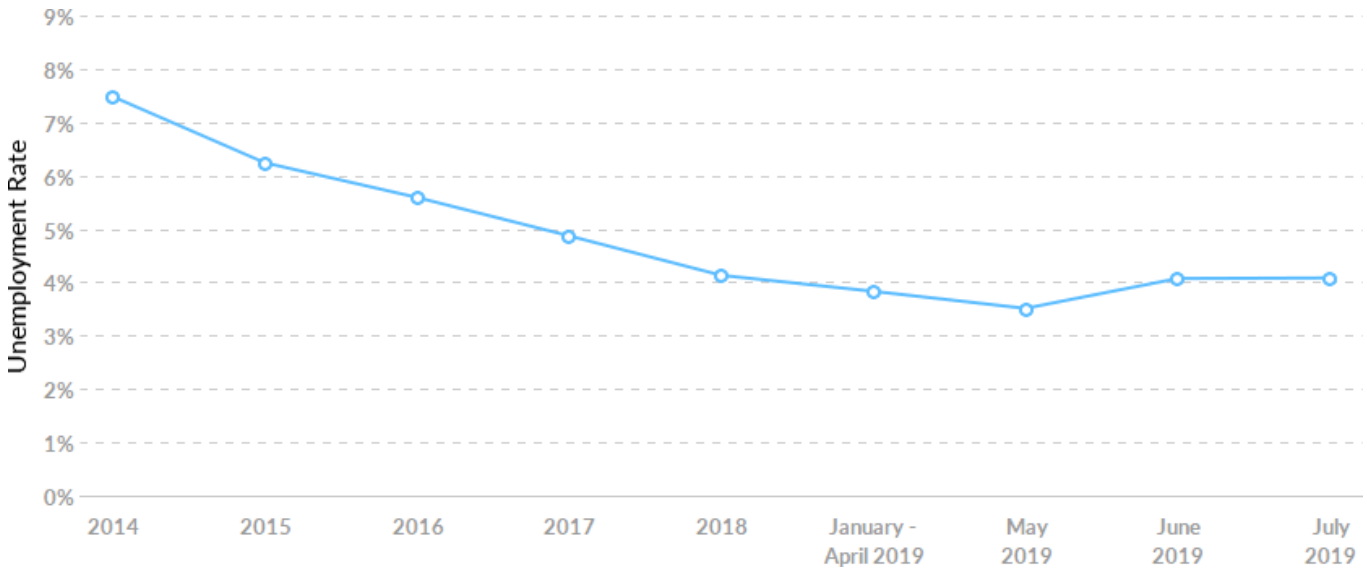
Your area has 54,763 veterans. The national average for an area this size is 36,551.

LWDB 20 Population Trends

As of 2019 the area's population increased by 10.7% since 2014, growing by 63,043. Populations expected to increase by 6.9% between 2019 and 2024, adding 44,846.

Timeframe	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Population	587,770	600,546	615,513	627,508	639,454	650,812	661,400	671,128	680,048	688,211	695,658

LWDB 20 Unemployment Rate Trends



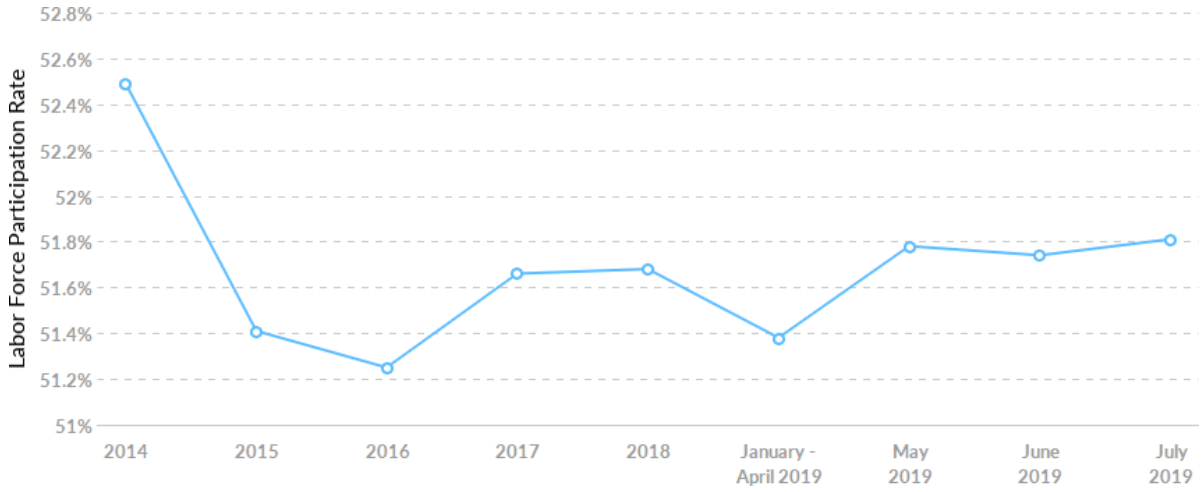
Timeframe	2014	2015	2016	2017	2018	January - April 2019	May-19	Jun-19	Jul-19
Unemployment Rate	7.48%	6.24%	5.59%	4.87%	4.13%	3.83%	3.51%	4.07%	4.08%

LWDB 20 Labor Force Participation

Current Snapshot

	Population
Total Working Age Population	555,188
Not in Labor Force (15+)	267,534
Labor Force	287,654
Employed	275,908
Unemployed	11,746
Under 15	95,624

Participation Rate Trends



Timeframe	2014	2015	2016	2017	2018	January - April 2019	May-19	Jun-19	Jul-19
Labor Force Participation Rate	52.49%	51.41%	51.25%	51.66%	51.68%	51.38%	51.78%	51.74%	51.81%

LWDB 20 Educational Attainment

Concerning educational attainment, 15.7% of residents possess a bachelor's degree (3.1% below the national average), and 9.7% hold an associate degree (1.7% above the national average).

	% of Population	Population
Less Than 9th Grade	6.6%	32,619
9th Grade to 12th Grade	6.4%	31,471
High School Diploma	31.3%	153,652
Some College	21.5%	105,457
Associate's Degree	9.7%	47,898
Bachelor's Degree	15.7%	77,151
Graduate Degree and Higher	8.8%	43,116

(4) Please provide an analysis of the workforce development activities (including education and training) in the local area, including an analysis of the strengths and weaknesses of such services and the capacity to provide such services, to address the identified education and skill needs of the workforce and employment needs of employers in the local area (WIOA §108(b)(1)(D) and WIOA §108(b)(7)).

The development of a workforce-ready talent pipeline begins in elementary and middle school and continues throughout the educational and work life of the individual. In the shifting landscape, how we prepare students to enter the workforce and upskill or reskill workers currently in the pipeline, must be continuously reviewed with an eye towards identifying the skills, technology, and business processes they need to be successful.

Many careers are experiencing rapid change from a predictable pathway leading to defined jobs and a stable skill set, to continuous learning to keep both the employer and worker competitive.

The challenge is to maintain the competitive edge through continuous review and revision of the Workforce Readiness Framework which includes:

- A flexible process for connecting students in educational and training programs to the evolving
- workforce.
- Strong partnerships between industry leaders and educators who are committed to communicating changing needs.
- Reviewing and revising curriculum to prepare the students for workforce success to avoid periods of obsolescence.
- Continuously identifying workforce readiness resources.

Partnerships in LWDA have a history of successful partnerships that have demonstrated successes creating new pathways to the workforce. For example:

- **Ready to Work Manufacturing Boot Camps** - The Economic Develop Council of St. Lucie County, the Treasure Coast Manufacturers Association and partners have conducted two Boot Camp programs for over 46 recent graduates of St. Lucie Public Schools. The five-day boot camp was designed to prepare the young people, who were chosen by their guidance counselors, for immediate, high-demand careers. The Boot Camp ended with a "signing day" connecting students directly to business addressing the "Last Mile" issue discussed in the Recommendation #1. Job retention rates were 64% and 69% for the two sessions
- **CSRC's Registered Apprenticeship Programs** – CareerSource Research Coast is the sponsor of three Registered Apprenticeship Program, one of which was the first in Florida. CSRC's registered apprenticeship programs address three (3) occupations; Industrial Manufacturing Technician, Truss Design Technician and Distribution Logistics Technician.
- **Treasure Coast Builders Association (TCBA) Apprenticeships** - TCBA in partnership with the Florida Training Services of Florida Services, offers apprenticeships in Electrical, HVAC, Welding, Plumbing, and Carpentry.
- **State-of-Jobs Conference (SOJC)** - Two State-of-the-Jobs Conference have been held in LWDA 20, in collaboration between CareerSource Research Coast and Workforce Readiness Taskforce stakeholders. Post-secondary education options, career readiness, employability skills and leadership in a range of career tracks – healthcare, manufacturing and skilled trades – were presented to 435 students in 2018. In 2019, the career sectors were expanded to include Tourism & Hospitality, Culinary, Professional Business and Financial and Arts & Design, attracting over 600 students from the Treasure Coast high schools. Students remarked that they learned about career options they never thought of pursuing.
- **IRSC and Piper Aircraft Apprenticeship** Program - The two-year apprenticeship program commenced in the summer of 2019 with an initial cohort of 10 participants and grow to 20 active apprentices by year two. Participants will engage in on-the-job training with Piper subject matter experts and classroom instruction, which will be delivered by IRSC.
- **Healthcare Roundtable of the Treasure Coast** - Convenes monthly to discuss workforce issues. The group hosted a Future Healthcare Professionals Career Conference for 200 Martin and St. Lucie County high school students. Workshops included soft skills, financial aid opportunities, career pathways and task management/critical thinking

CSRC is dedicated to meeting the needs of both employed and underemployed workers, career seekers seeking assistance with career decisions, skill training, job connections and offers career, basic, individualized, follow-up and training services. CSRC, through the direct services model, serves as the direct services provider and provides all WIOA Adult/Dislocated Worker/Youth, TAA, TANF, SNAP, Wagner Peyser, MSFW, Reemployment, and Jobs for Veterans State Grant activities and services throughout the

LWDA. Through collaborative efforts with local community-based organizations and educational institutions, as well as the WIOA implementation with core partners and our Comprehensive One-Stop Career Center, career seekers in the LWDA have full access to allowable basic, individualized, follow-up, training and support services.

A significant portion of the unemployed lack basic skills in demand by employers. One of the deficiencies that continues to be recognized is a lack of soft skills. To meet these needs, CSRC offers the Work Certified® program. Work Certified® is a work readiness program that was created in partnership with employers, educators, and workforce professionals to enhance career seeker's skills. It provides training to individuals who need life skills, remedial education, employability skills, and emotional intelligence. The program awards certification only to those participants who can demonstrate they are ready to be responsible, productive employees. CSRC strategically customizes the Work Certified® curriculum to better serve a specific industry.

(5) Please provide a description and assessment of the type and availability of adult and dislocated worker employment and training activities in the local area (WIOA §108(b)(7)).

CSRC offers employers and career seekers extensive services that promote workforce development and bolster career seekers' skill development and employment success. Education and training activities for WIOA Title I Adult/Dislocated Workers' programs include short-term prevocational services, including assistance with learning skills, communication skills, interviewing skills, occupational skills training, OJTs, internships, apprenticeships and customized training that is designed to meet the specific employer needs. Services for incumbent workers include training to upgrade existing employees' skills and internships which provide opportunities to gain the skills and knowledge necessary to perform a job. Career counseling and/or career pathways are grounded in employer partnerships.

In support of workforce development activities, CSRC provides several activities such as: federal bonding; salary and wage trend information; availability of training options; industry sectors talent supply and employment placement assistance which are each designed for employers to thrive. CSRC utilizes a Training Provider Scorecard to track progress and performance. All training providers are required to submit performance data on a semester/term basis and are held to specific performance standards relative to completion, certification and employment of the training programs offered. CSRC provides updated policies and procedures to all training providers relative to meeting the needs of employers and career seekers.

WIOA eligible and suitable career seekers receive employment assessments and labor market information, including our LTOL and ETPL, to determine the best career pathway for self-sufficiency. Before being placed in any training program, career seekers are tested using a variety of assessment tools to ensure they are prepared to succeed, including Employ Florida Self-Assessments, Florida Skills Assessment, Prove It, CASAS, TABE, My Next Move, and Florida Ready-to-Work.

(6) Please provide a description and assessment of the type and availability of youth workforce investment activities in the local area, including activities for youth who are individuals with disabilities. The description and assessment must include an identification of successful models of such youth workforce investment activities (WIOA §108(b)(9)).

Youth workforce investment activities are administered through a subrecipient agreement with a contracted WIOA Youth program provider. Currently, youth services are contracted through Eckerd Youth Alternatives. CSRC ensures quality delivery of the required fourteen elements of WIOA Youth programming by providing incentive plans, establishing youth goals and providing various program activities. Youth workforce investment activities implemented by CSRC include an incentive policy that drives youth to complete skills gains in a methodic, pathway-oriented order, a quality work-based learning model (work experience/internship), Youth Employment Success Solutions (YESS™) employability and soft skills training, and occupational credential options that are stackable. Additionally, CSRC operates a Youth Council comprised of private businesses, educational partners, and community-based organizations which enhance youth workforce investment activities through their own programs. For youth with disabilities, youth staff

makes every reasonable accommodation for WIOA service administration to youth. Necessary accommodations for youth with disabilities are identified by Individual Education Plan (IEP) records, provided by local school districts or through medical records. CSRC also partners with Vocational Rehabilitation to better serve youth with disabilities.

WORKFORCE DEVELOPMENT AREA VISION AND STRATEGIC GOALS

(1) Describe the local board's strategic vision and goals for preparing an educated and skilled workforce (including youth and individuals with barriers to employment), including goals relating to primary indicators of performance described in WIOA section 116(b)(2)(A) to support regional economic growth and economic self-sufficiency (WIOA §108(b)(1)(E)).

The primary role of the LWDB, as envisioned by WIOA, is to serve as a strategic convener to promote and broker effective partnerships throughout the local area to advance opportunities for all workers and career seekers, including low-skilled adults, youth, and individuals with barriers to employment. As a strategic leader, CSRC focuses its efforts on building partnerships with area leaders in economic development, education, and local industry associations to develop strategies that address existing skills gaps in the LWDA to ultimately achieve economic grown and self-sufficiency throughout the area.

CSRC's vision is to be the catalyst empowering our communities toward economic success. To realize that vision and meet the WIOA primary indicators of performance targets, CSRC employs multiple strategies:

- CSRC serves as a convener for the area's Workforce Readiness Taskforce, bringing together economic development agencies, educational providers, business leaders representing industry sectors in demand and community partners. The mission of this industry-led taskforce is to organize processes and leverage resources to support a focused sector-based talent development pipeline to meet the needs of employers and career seekers throughout the LWDA.

- CSRC promotes Registered Apprenticeship and Pre-Apprenticeship programs as an effective strategy to develop career pathways and in working with employers, adults, dislocated workers, and youth, takes advantage of the opportunities provided by WIOA to fully align and integrate apprenticeship programs into the local workforce system, as detailed later in the Description of Program and Service Section #13 Enhancing Apprenticeships.

- CSRC promotes a customer-centric culture where the frontline staff is trained and empowered to provide career counseling to all individuals engaged in the Career Centers. These one-on-one engagements facilitate the development of career pathways and are designed to increase access to and opportunities for, the employment, education, training, and support services that individuals need to succeed in the regional and local labor markets, with emphasis on priority populations under WIOA

- To prepare Board of Directors members to effectively carry out governance functions such as local planning, program oversight, negotiating local performance accountability measures, selection of operators and providers, and approving a budget for local board activities, CSRC purchased an online video presentation. Beginning January 2020, new board members will be required to complete the orientation as part of the onboarding process and current board members will view a module during each board meeting until the video series is complete.

(2) Describe the local area's strategy to work with entities that carry out the core programs to align resources available to the local area to achieve the strategic vision and goals established by the local board.

As a direct-services provider, CSRC carries out two of the four core programs: WIOA Title III: Wagner Peyser and WIOA Title I. B: Adult, Dislocated Workers and Youth programs, utilizing a subcontractor to facilitate WIOA youth Programs. Partners carrying out the core programs under Title II: Adult Education and Literacy and Title IV: Vocational Rehabilitation programs have a presence on our Board of Directors and are active on-board committees.

A Memorandum of Understanding (MOU) has been developed among the core program partners to: outline resources, develop referral procedures, and track referrals to identify shared customers, define customer service delivery and create common performance indicators and to develop and implement operational policies. An Umbrella MOU has been developed and agreed upon by all the WIOA core partners for the CSRC Comprehensive One-Stop Career Center.

CSRC also utilizes an integrated and expert intake process of all clients entering the Career Centers. CSRC frontline staff are highly familiar with the functions and basic eligibility requirements of each core program and can appropriately assist clients and make knowledgeable referrals to partner programs. This is maintained with continuous cross training, informational partner meetings, partner program literature/media and staff meetings.

(3) Describe the actions the local board will take toward becoming or remaining a high-performing board, consistent with the factors developed by the state board pursuant to section 101(d)(6) of WIOA.

The action steps CSRC will take toward remaining a high-performing board under WIOA to achieve the goals and objectives of our strategic vision which are consistent to Florida's strategic vision for WIOA implementation and the three goals set to accomplish the vision. Our strategic vision and goals reflect the characteristics of a high-performing Career Center system; excellent customer service, innovation, strong partnerships and systems integration, and high-quality staffing. Action steps will include the following:

CSRC has set goals in correlation to CareerSource Florida Inc.'s strategic vision and the three goals to accomplish the vision.

- Improve upon, design and implement practices that actively engage targeted industry sectors, promote career pathways, registered apprenticeships and promote skill-based initiatives.
- Improve career exploration, educational attainment and skills training for in-demand industries for youth that lead to enhanced employment, career development, credentialing and post-secondary education opportunities.
- Establish strong partnerships with core and other partner programs, share data as appropriate, establish common goals, utilize a shared customer base (employers and career seekers) and provide opportunities for career seekers at all skill levels.
- Expand and enhance partnerships on projects where CSRC assesses, career plans, case manages, funds the support and training needs of underserved populations such as the following projects currently underway:
    - Lincoln Park Common Good Career Pathways Initiative, an occupational skills training initiative targeting residents of a large low-income community to gain industry certifications and career opportunities in the manufacturing, logistics and health care industries.
    - Treasure Coast Food Bank – Culinary Training Program targeting low-income individuals to gain industry certifications and career opportunities in the food service and hospitality industries.
- Continue efforts to strengthen CSRC's three registered apprenticeship programs for Industrial Manufacturing Technician, Truss Design Technician and Distribution Logistics Technician; and partnerships with other registered apprenticeship programs including Piper Aircraft's Aircraft Rigging & Fabrication, CVS Health's Pharmacy Technician, IRSC's Electrical and HVAC apprenticeships, Florida Training Services' Carpentry Apprenticeship and various construction trades apprenticeships sponsored by the local labor unions.
- Develop and expand pre-apprenticeship opportunities for youth and other low skilled individuals which will provide them short-term classroom and employability skills training in preparation for a career pathway in a Registered Apprenticeship program.
- Provide and participate in cross-agency training to CSRC staff, partner and service provider staff that promotes accountability for productive outcomes.
- Create and implement a formal cross-functional training program for Career Center staff.
- Provide subject matter expert learning and development opportunities.
- Provide continuous customer service training for all employees.

- Utilize a customer service survey in each of the Career Centers that allows clients to provide immediate feedback about their customer service experience directly to the Career Center Manager. Clients can also request to be contacted for follow up, which is completed by the respective Career Center Manager.
- Develop performance criteria to use for assessment of effectiveness and for continuous improvement.
- Expand and enhance outreach activities, access to transportation and other supportive services.
- Review, revise and develop policies and procedures that ensure a coordinated and responsive service delivery system.

(4) Describe service strategies the LWDB has in place or will develop that will improve meeting the needs of customers with disabilities as well as other population groups protected under Section 188 of WIOA and 29 CFR Part §38.

CSRC will employ the following service strategies to improve the ability to meet the needs of customers with disabilities as well as other protected population groups:

- Develop a combined intake tool for core partners in the CSRC Comprehensive One-Stop Career Center to help identify target populations, provide assessment to determine their individual needs and programs eligibility, track and streamline service delivery.
- CSRC continues to operate as an Employment Network (EN) in the Ticket to Work (TTW) program
- Utilize a Disability Navigator for the LWDA.
- Increase the usage of assistive technology services and devices to improve service delivery and communication.
- Provide training to all CSRC staff to ensure they are sensitive to the unique needs of individuals and that they are prepared to provide for or refer for necessary accommodations.
- Conduct cross training with core partner's staff, other partner program staff and CSRC staff to promote relationship building in areas such as job search techniques, job development, employer and training services.
- Develop protocol for staff working with individuals with disabilities that ensures the preservation of confidentiality of the customer.
- Develop and implement data sharing agreements among partner programs that serve individuals with disabilities that increase effective support of customers served by the Career Centers, consistent with privacy and confidentiality policies.
- Ensure that all marketing and recruitment materials mention that services are available to individuals with disabilities.
- Identify and collaborate, on an ongoing basis, with local community or advocacy organizations, agencies and schools that provide services and support to individuals with disabilities to educate them about our services and to share resources.
- Provide employers with disability awareness training.
- Develop and maintain a list of local agencies and resources that assist individuals with disabilities and make this information available to CSRC staff and clients.
- CSRC has adapted its employability skills/work readiness curriculum, YESS™, to meet the VR standards for employability skills training for in school students, ages 15+. CSRC is an approved vendor for VR and can provide the YESS™ curriculum to transition students at local high schools in the LWDA.

(5) Describe the process used to develop your area's vision and goals, including a description of participants in the process.

CSRC brought together critical team members, appointed based on their roles, responsibilities and expertise within our organization. The team attended a two day "leadership" training that was facilitated by a professional consultant and trainer specializing in leadership and organizational effectiveness.

Prior to attendance at the two-day training, a 360-degree survey was conducted on each team member. The team members were evaluated by themselves, their direct reports, their co-workers, their supervisors and other partner agency staff they worked with on a continual basis. The purpose of the evaluation was to assess current leadership practices, to determine needs and identify areas of concern.

The first day of the training focused on the individual members' strengths and areas of improvement needed to establish a strong leadership team. The team examined the organizations weaknesses, strengths, opportunities and threats and identified changes needed. Leadership competencies for success and best practices were also reviewed. The second half of the day, the team established common core beliefs and values for the organization. From these core values, the CSRC Vision and Mission statements were reviewed and revised.

The second day of the training, the team set the Vision and Mission for CSRC and identified the main areas of focus to set goals and objectives in order to achieve the "new" vision. Action steps/strategies to achieve the goals and objectives were also developed.

Later, a sample cross-section of CSRC staff members were chosen and met with Executive Management. The leadership team's ideas, values, and strategies were brought forward to these staff members in order to create and adopt a shared vision and mission for the Board of Directors. This group was asked for opinions, ideas and ultimately for agreement, support and "buy in". Staff members, who volunteered to do so, were asked to present a core value and belief to all staff members at a scheduled CSRC staff retreat.

CSRC later held a full day staff retreat. The theme of the retreat was "One Vision...One Mission...One Team". The purpose of the retreat was to create a shared vision that all would embrace and support. At the retreat, leadership team members presented the new vision, mission, strategic goals and objectives for CSRC. The appointed staff members presented on each of the core values and beliefs of the organization. All team members were asked for agreement and commitment to the new CSRC vision and mission. Every team member present signed a ONE VISION...ONE MISSION...ONE TEAM banner that is displayed in the CSRC Board Room.

Weekly meetings are held at each of the Career Centers to update CSRC frontline staff on the progress of organizational goals, to provide information regarding new initiatives and to share best practices. At the Comprehensive One-Stop Career Center, core partner staff are included in these meetings. The CSRC Administrative team also meets weekly to review progress, address issues and to strategize for continued improvement. Bi-Annual meetings are held with the entire staff of CSRC, to include core partners in the Comprehensive One-Stop Career Center, to review strategies, set goals, review progress, address issues, explain new initiatives and celebrate successes.

At the beginning of each Program Year, CSRC revisits and recalibrates their strategic goals in response to changing economic conditions, the workforce needs of the LWDA and to align with CareerSource Florida's business and market-driven principles to be the global leader for talent.

(6) Describe how the LWDB's goals relate to the achievement of federal performance accountability measures to support economic growth and self-sufficiency (WIOA §108(b)(1)(E)).

CSRC goals are designed to create and support a high-quality workforce development system in the LWDA. The goals are set at the beginning of each Program Year and are directly linked to the achievement of the WIOA Indicators of Performance as described in question number seven (7) of this section. CSRC goals and objectives are created upon the following features of excellence:

- The provision of excellent customer service to all career seekers and employers through the CSRC Career Center system that integrates and connects them with the full range of services available in our communities.
- The practice of continuous improvement supported by improved evaluation methods, accountability measures, data driven decision making, cross-training of staff and the use of best practices.
- The strengthening of partnerships with core programs, employers and building new partnerships in order to enhance the provision and service delivery of education and training, work-based learning, career pathways and industry sector involvement.
- Operational team goals based on federal performance targets

Achievement of CSRC's goals will ensure that career seekers, including those with significant barriers to employment and limited resources, have the skills, credentials and supportive services required to gain and retain employment in in-demand occupations with sustainable wages. Local employers' workforce needs will be better met and the LWDA economy will improve.

(7) Indicate the negotiated local levels of performance for the federal measures (WIOA §108(b)(17)).

Measures	PY 2018-2019 Performance Levels	PY 2019-2020 Performance Levels
Adults:		
Employed 2nd Qtr After Exit	**85.0%**	**85.2%**
Employed 4th Qtr After Exit	**82.5%**	**83.0%**
Median Wage 2nd Quarter After Exit	**$7,000**	**$7,000**
Credential Attainment Rate	**63.0%**	**66.0%**
Dislocated Workers:		
Employed 2nd Qtr After Exit	**81.0%**	**82.0%**
Employed 4th Qtr After Exit	**78.0%**	**79.0%**
Median Wage 2nd Quarter After Exit	**$6,700**	**$6,850**
Credential Attainment Rate	**65.0%**	**68.0%**
Youth:		
Education and Employed 2nd Qtr After Exit	**75.0%**	**75.5%**
Education and Employed 4th Qtr After Exit	**69.0%**	**69.2%**
Credential Attainment Rate	**75.2%**	**75.5%**
Wagner-Peyser:		
Employed 2nd Qtr After Exit	**63.0%**	**63.2%**
Employed 4th Qtr After Exit	**62.0%**	**64.0%**
Median Wage 2nd Quarter After Exit	**$4,850**	**$5,000**

(8) Describe indicators used by the LWDB to measure performance and effectiveness of the local fiscal agent (where appropriate), contracted service providers, and the one-stop delivery system in the local area (WIOA §108(b)(17)).

- At the beginning of each program year as performance measures are negotiated and assigned to CSRC, the executive leadership team of CSRC develops strategic goals that will lead to the accomplishment of these required performance measures and provide evidence of CSRC's effectiveness. Strategic goals are set for all programs and then drilled down to the assignment of specific goals for every CSRC team member. All CSRC program staff are assigned goals that directly contribute to the achievement of performance measures, achievement of any incentives for performance and which hold each staff member accountable for performance. Staff goals are evaluated with each team member by the appropriate manager on a quarterly basis. This strategy allows frontline staff, management and administration to keep abreast of the progress and effectiveness. However, most importantly, it allows time for individual and/or system wide corrective actions to be taken in order to get on track to meet performance measures and operate in the most effective manner.

- The One-Stop Operator's major function is the coordination of the service delivery among the required One-Stop System Partners and their programs. The One-Stop Operator will navigate between the One-Stop Partners to ensure there is coordination of programs and services for effective service delivery for employers and career seekers within the Career Center System. The One-Stop Operator will regularly monitor the shared referral database to ensure timely follow-up by all partners with the referred client. The One-Stop Operator will submit written quarterly reports to the CSRC Board of Directors, recommendations to improve the One-Stop Partner's integrated service delivery to customers, and the identification of best practices to include the progress of the collaboration between the partners.

- Each Career Center has a customer service kiosk located in their resource room for clients to complete a short survey of their experience. Results are shared electronically with each Career Center Manager, who in turn follows up with the client if requested. A customer service survey is also in place for all shared clients of the Comprehensive One-Stop Career Center and required partners who have been referred to a partner agency. By the tenth of each month, all referred clients from the previous month are contacted and asked about their experience. Results are included in the One-Stop Quarterly Report, which is shared at CSRC Board meetings, as well as during the Quarterly One-Stop Partner meetings.

- After every major hiring event, a SWOT (strengths, weaknesses, opportunities and threats) analysis is held with all stakeholders involved in the planning/implementation. Each individual shares their feedback in all four areas and at the conclusion of the SWOT analysis, recommendations are discussed as a group to develop strategies to address concerns and areas of opportunity, as well as to cement best practices.

- Comments received via all CSRC social media outlets are compiled by the CSRC Communications Manager and provided to the Executive Team for review. The Director of Operations will share with the appropriate Center Manager to identify strengths and areas of opportunities.

(9) Describe the definition of "self-sufficiency" used by your local area (WIOA §108(b)(1)).

CSRC bases "self-sufficiency" on a career seeker's household income. Individuals who have a household income at or above 200% of the Lower Living Standard Income Level (LLSIL) are considered self-sufficient. For underemployed workers engaged in work-based training whose household income exceeds 200% of the LLSIL, CSRC uses the Living Wage Calculator to assess their self-sufficiency. The Living Wage Calculator, produced annually by Dr. Amy K. Glasmeier and the Massachusetts Institute of Technology, is an alternative measure of basic needs that draws upon geographically specific expenditure data related to a family's likely minimum food, childcare, health insurance, housing, transportation, and other basic necessities (e.g. clothing, personal care items, etc.) costs. The living wage draws on these cost elements and the rough effects of income and payroll taxes to determine the minimum employment earnings necessary to meet a family's basic needs while also maintaining

COORDINATION OF SERVICES

(1) Coordination of Programs/Partners: Describe how individualized career services are coordinated across programs/partners in the one-stop centers, including Vocational Rehabilitation, Temporary Assistance for Needy Families (TANF) and Adult Education and Literacy activities. Specify how the local area coordinates with these programs to prevent duplication of activities and improve services to customers.

CSRC is dedicated to meeting the needs of employers and career seekers and strategically aligns our workforce system with economic development, education and the core partners required under the implementation of WIOA. CSRC collaborates with its core partners through joint agreements, MOUs and joint planning. With the implementation of WIOA, CSRC has entered into an Umbrella MOU with the required core partners which outlines how individualized career services are coordinated across programs/partners in the CSRC Comprehensive One-Stop Career Center to serve the needs of individuals. In some instances,

CSRC staff ensures individuals are dual enrolled in other programs to provide the services needed to attain employment and become self-sufficient. These strategies will ensure that services to customers are not being duplicated.

To streamline the service delivery of shared clients of the Comprehensive One-Stop Career Center partners, CSRC developed a formal referral system for all partner programs to use to send, receive, and track client referrals. All core partners can access the Google database and share progress and results of engagements with the shared clients. The sharing of cross referral outcomes is a priority in order to support the goals of WIOA and increase career seeker access and achievement. Referrals to the shared client database are monitored regularly to ensure timely follow up by the partners.

Upon visiting any of the CSRC Career Centers, career seekers undergo a thorough intake and screening process to identify their needs, skills, and barriers. Based on the results of the screening, the appropriate basic and individualized career services are provided. Referrals are made to appropriate program partners to address and identify the needs of a career seeker.

Basic services include assistance with filing RA claims, orientation to all services available in the one-stop delivery system, skills assessments, job search and placement assistance, referrals to workshops, labor market information, and referrals to community partners for supportive services. At each access location, individuals also receive, as appropriate, referrals to VR, the Division of Blind Services, Adult Education and Literacy, the Senior Community Service Employment Program, the CSBG, Career and Technical Education, and to TANF. These are core partners who are co-located and/or available by Skype in our Comprehensive One-Stop Career Center.

Individualized career services include comprehensive and specialized assessments and diagnostic testing, development of an individual employment plan, group and/or individual counseling and mentoring, career planning, short term training, internships, and work experiences that are linked to careers.

WIOA Adult/Dislocated Worker and Youth Programs

Career Planners provide staff-assisted interviews to fully explain the available basic and assisted services, with a focus on education and training, and to assist the career seeker in developing a career plan to obtain or return to employment. Staff work with career seekers to develop an appropriate Individual Employment Plan (IEP) to guide them through their training or employment process in order to achieve their goals.

WIOA Adult/Dislocated Workers and Youth programs partner with a variety of CSRC programs to serve the needs of enrolled individuals. Youth are commonly co-enrolled in the Adult and WT programs. All WIOA staff work closely with MSFW and Veteran staff to identify career seekers in need of individualized and training services.

Vocational Rehabilitation

CSRC coordinates with the local VR programs to refer participants with intellectual and developmental disabilities in need of employment and training activities. WIOA programs work with VR to serve individuals with disabilities in order to make the necessary accommodations to fit their specific needs. Refer to the Organizational Structure section, question (4)(e) for further detailed information.

Adult Education and Literacy Activities

Adult Education Centers in the LWDA have established a referral process for adult and youth for GED and ESOL services. As part of the WIOA implementation of core partners, GED classes are offered onsite in the Comprehensive One-Stop Center, four days per week. Refer to the Organizational Structure section, question (4)(e) for further detailed information.

Trade Adjustment Act (TAA)

TAA services include initial assessment, provision of labor market research, individual counseling, interest and aptitude testing, development of an individual employment plan, referrals to supportive services, classroom training, on the job training, post-secondary education, and remedial education. TAA Services are provided by the TAA Coordinator merit staff person employed by the Department of Economic Opportunity (DEO) in coordination with CSRC. CSRC is required to follow all policies and procedures issued

by the state and federal authorities. When TAA is unable to provide services to eligible enrolled individuals, TAA partners with the WIOA program and other core partner programs to enhance the services needed to ensure the career seeker returns to employment.

Rapid Response Services

CSRC coordinates Rapid Response Services in the LWDA providing early intervention and immediate assistance with layoffs, layoff aversion, and closures affecting a significant number of workers. CSRC's Rapid Response Unit consists of representatives from core programs including Wagner Peyser, Re-Employment Assistance, WIOA, TAA and LVERs. The unit receives notices of closures and mass layoffs, including those covered under the Worker Adjustment and Retraining Notification Act (WARN). Upon notification about a major layoff, immediate on-site services are provided to assist workers facing job losses. To assist transitional workers with their immediate needs, CSRC coordinates services with core partners, such as Florida Department of Children and Families, Local Area Food Banks, Department of Health and Human Services and the United Way. In order to facilitate a rapid transition to self-sufficient employment, CSRC provides career, basic, individualized, follow-up and training services to affected workers.

Temporary Assistance for Needy Families (TANF)

Welfare Transition (WT) Program participants receive individualized career services through the one-stop delivery system including career exploration, career counseling and planning, assisted job search, job referrals, job development, referrals to workforce preparation workshops, and federal bonding services. An Individual Responsibility Plan is created with WT participants to identify specific career and education goals and steps necessary to work toward self-sufficiency. Participants are assigned to community service and work experience activities at community partner worksites to teach and/or strengthen basic job skills. WT participants may be provided with support services to assist with overcoming barriers to education and employment. CSRC offers access to Rosetta Stone® education software to all WT Program participants demonstrating a language barrier. The LWDA's established referral process is utilized for GED, ESOL, post-secondary classroom training, and for the variety of programs and services available through partner organizations. WT participants are often co-enrolled in WIOA to enhance training opportunities as the WT Program offers a wide variety of support services. Classroom training and OJTs are a coordinated effort between programs.

(2) Coordination with Economic Development Activities: Describe how the local board coordinates workforce investment activities carried out in the local areas with economic development activities carried out in the local area (or planning region) in which the local area is located and promotes entrepreneurial training and microenterprise services (WIOA §108(b)(5)).

The focus of CSRC is to develop a seamless service delivery system that provides training and employment services that aligns and supports the economic development efforts of the LWDA. As a standard, CSRC provides a wide variety of services to employers including, posting of job vacancies, recruitment assistance, recruitment events, job fairs, labor market information, tax credit information, skills assessment and grants. CSRC works closely with the local Small Business Development Center's (SBDC) entrepreneurial development programs. The SBDC serves as the primary entity offering counseling and training to small business clients in the LWDA and CSRC supports participating businesses with employment and training services as requested.

To further coordinate workforce investment activities with economic development activities CSRC aims to:

- Work with local and regional economic development professionals in business retention, and expansion activities as needed.
- Work with other economic development partners to support the attraction, growth, and retention of businesses and provide jobs to the LWDA.
- Utilize business intelligence to identify the current economic life cycle of regional businesses.

- Provide information to and work with local economic development organizations and others working on attraction and retention projects concerning skills of the workforce in the LWDA and potential recruitment and training services available.
- Make presentations to business, civic and trade organizations regarding the workforce related topics and services.
- Strengthen relationships with other economic development organizations such as chambers of commerce, human resources organizations, etc.
- Encourage entrepreneurship by working with Small Business Development Center (SBDC), SCORE and IRSC's entrepreneurship programs which foster business start-ups.
- Actively promote the veteran entrepreneurship program to the veteran population served by CSRC.
- Utilize sector strategies to support businesses in meeting their human resource needs.
- Review and recommend workforce development-funded appropriate training curriculum and skills credential certifications.
- Map the talent pipeline for respective sectors and identify where the talent needed.

(3) Coordination of Education and Workforce Investment Activities: Describe how the local board coordinates education and workforce investment activities carried out in the local area with relevant secondary and postsecondary education programs and activities to coordinate strategies, enhance services, and avoid duplication of services (WIOA §108(b)(10)).

CSRC partners with several community-based secondary and postsecondary education programs and entities to coordinate and enhance services to eligible individuals. Examples of these include the Lincoln Park Common Good Career Pathways Initiative, which offers tuition-free training opportunities for residents of low-income community to gain industry certifications in Manufacturing/Certified Production Technician (CPT), Certified Logistics Associate (CLA) and Certified Nursing Assistant (CNA); a training agreement with the Treasure Coast Food Bank, which offers an Introductory Food Service & Hospitality Culinary Training Program for low-income individuals; and partnerships with a broad range of manufacturing employers who hire and train qualified individuals in high-demand occupations through CSRC's pre-apprenticeship and registered apprenticeship programs.

CSRC collaborates with the Indian River County Economic Development, Indian River County School District, Treasure Coast Technical College (a local post-secondary education provider) and area manufacturers to engage in a one to two-week manufacturing boot camp which provides a mechanism for marketing apprenticeship opportunities available locally. The group targets underrepresented populations of Indian River County, particularly recent graduates of secondary education school. The boot camp includes tours at local manufacturing sites, hands-on activities, and soft skills to build a foundation on the benefits of a career path in manufacturing. Participants who complete the boot camp and qualify for WIOA Adult/DW training services can move directly into the IMT registered apprenticeship.

CSRC hosts the State of Jobs Conference (SOJC), the industry driven half-day conference brings together 600 plus high school Juniors and Seniors to explore post-secondary training options, and career path opportunities in various industry sectors in demand. The conference features keynote speakers and sector industry leaders who engage students with career path opportunities, leadership skills, career readiness and financial aid information

WIOA Youth services focuses on serving out of school youth in the LWDA. Local area high schools and local adult education programs refer youth who withdraw from school to our offices for GED services. A summer work initiative, Summer of Success, in partnership with the St. Lucie County School District with funding provided by the St. Lucie County Board of County Commissioners and Allegany Franciscan Ministries serves in-school youth, while WIOA Youth Services serves out of school youth. WIOA Youth services frequently works with Indian River State College as well as other public and private training institutions to provide post-secondary options for enrolled Youth. WIOA youth staff are present at key college campuses (both private sector and state college), as well as community events focused on youth to provide information and support for Youth.

CSRC staff members receive Test of Adult Basic Education (TABE) and Comprehensive Adult Student Assessment System (CASAS) training and are certified to administer these assessments to career seekers utilizing our system. These assessments assist CSRC staff in determining the need for referral to our adult education and literacy partners. CSRC's Career Centers and our local adult education and literacy programs make cross referrals and share cross-referral outcomes to support the goals of WIOA and increase student access and achievement. CSRC staff visit local adult education facilities to provide information to students and instructors about the resources available. The CSRC Job Developers, in partnership with local employers, collaborate with adult education and literacy to develop career pathways for high demand careers in the LWDA.

(4) Coordination of Transportation and Other Supportive Services: Describe how the local board coordinates workforce investment activities carried out under this title in the local area with the provision of transportation, including public transportation, and other appropriate supportive services in the local area (WIOA §108(b)(11)).

- Transportation support services provided through the WT Program include gas assistance, vehicle repair, vehicle registration, and vehicle insurance (6 months of liability insurance). Assistance with childcare is offered through the partnership with the Early Learning Coalition. When a hardship is demonstrated, the cost of childcare registration fees and a portion of the parent co-payment may be provided to the participant. Tuition assistance is available for GED, ESOL/ESL, and post-secondary classroom training. In addition, work or school related tools/equipment, uniforms, books, and licensing fees may be provided as supportive services through the WT Program.

- CSRC follows the flexibility guidance provided by WIOA, using discretion to provide the supportive services it deems appropriate when a participant has a critical need. To maximize training dollars, CSRC provides limited support services to WIOA enrolled individuals which may include licensing fees, transportation, tools, uniforms and footwear required on a job site. To leverage funding for supportive services, CSRC coordinates with other entities and programs offered by core partners such as TAA, WT, VR, Blind Services, CSBG, Veteran Services and community-based organizations.

- WIOA Youth supportive services may be provided when a need has been identified, when the participant will not be successful without this support, and when no alternate funding is available to pay for such supportive service. Supportive services may include work uniforms, work boots, tools or equipment, supplies, test(s), license(s), physicals. Funding to provide transportation support services for participants varies, but may include bus passes, gas cards, taxi fare, and driving permit/driver's license fees.

- In each county that comprises the LWDA, the Career Center Manager serves on the Local Coordinating Boards for the Transportation Disadvantaged (LCB-TD) Advisory Committee to give voice to the needs of career seekers as it pertains to transportation. The LCB-TD in each of the counties work in concert to provide public transportation for individuals traveling to/from the adjoining counties. This allows career seekers access to career opportunities throughout the LWDA and not just their county of residence.

- On an annual basis, CSRC hosts the Treasure Coast Homeless Veterans Stand Down. The event is a coordination of efforts of agencies across the three-county area to offer services to the local homeless Veterans. Services provided include legal assistance, housing assistance, mental health, dental and medical screenings, Social Security services, haircuts, warm showers, hot meals, and supplies. Transportation was provided at no cost by the Veterans Service Office and the St. Lucie County public bus service.

- In order to provide as many students as possible the opportunity to participate and explore career paths in various in-demand sectors, CSRC assists with funding the transportation costs incurred by St. Lucie, Martin and Indian River County School Districts for the annual State of the Jobs Conference. The students are provided transportation to the industry driven half-day conference which brings together 600 plus high school Juniors and Seniors to explore post-secondary training options, and career path opportunities in various industry sectors in demand. The conference features keynote speakers and sector industry leaders who engage students with career path opportunities, leadership skills, career readiness and financial aid information.

(5) Coordination of Wagner-Peyser Services: Describe plans and strategies for, and assurances concerning maximizing coordination of services provided by the state employment service under the Wagner-Peyser Act (29 U.S.C 49 et seq.) and services provided in the local area through the one-stop delivery system to improve service delivery and avoid duplication of services (WIOA §108(b)(12)).

To improve service delivery and avoid duplication of services, CSRC developed a formal intake process to identify a career seeker's needs, skills and barriers. This initial intake meeting with the participant is a critical component in connecting them to career services and support that best fit their needs and career goals. Referrals to core partner programs to provide support for identified needs are made, as appropriate, during the intake process.

Once the initial intake interview is completed, Career Center staff develop a basic services strategy that engages the universal career seeker in basic services, as appropriate, including orientation to all services available in the one-stop delivery system, Employ Florida registration, skills assessments, job search and placement assistance, referrals to workshops, labor market information, reemployment benefits claims assistance, and referrals to community partners for supportive services. Individualized career services such as comprehensive and specialized assessments and diagnostic testing, development of an individual employment plan, group and/or individual counseling and mentoring, career planning, and training are also available. When staff identify that a career seeker will benefit from individualized career services, they will work with a Career Planner to develop a service strategy addressing the needs and barriers of the individual. If additional services are needed outside the scope of CSRC, an individual is referred to one of the core partners programs to provide specialized services.

Reemployment services which include orientation, assessment, and labor market information are provided to Priority Reemployment Planning Program (PREP) participants. Although PREP participants are selected by DEO and are mandated to receive these minimum services, they are often engaged in additional services and activities. As a best practice, all participants attending a scheduled PREP orientation meet one on one with a Career Planner to discuss Career Pathways and determine if additional training is needed for them to secure self-sufficient employment.

(6) Coordination of Adult Education and Literacy: Describe how the local board coordinates workforce investment activities carried out under this title in the local area with the provision of adult education and literacy activities under Title II in the local area, including a description of how the local board carries out, consistent with subparagraphs (A) and (B)(i) of section 107(d)(11) and section 232, the review of local applications submitted under Title II WIOA §108(b)(10).

The providers of Adult Education and Literacy for the LWDA are represented on the LWDB 20 Board of Directors. They actively participate on the Youth Council and the Programs and Services Committees. Information is shared at these meetings to address service gaps, leverage resources, and improve effectiveness. MOUs are in place with the two (2) providers of these activities and services in the LWDA, Indian River State College, and Treasure Coast Technical College (Indian River County School District). The purpose of these MOUs is to collaboratively partner to provide adults with the knowledge and skills they need to enroll and be successful in post-secondary education, to increase credential attainment and to improve their career options. For those individuals where English is their second language, the purpose is to improve their English speaking and writing skills to improve their academic skills so they can earn a high school credential and/or enter post-secondary education to improve their career options and credential attainment. Both partners are also listed on the CSRC ETPL.

IRSC, as a core and required partner of the CSRC Comprehensive One-Stop Career Center, has entered in to the CSRC Umbrella MOU. Under this MOU, IRSC provides adult education and literacy onsite at the Comprehensive One-Stop Career Center.

CSRC staff members receive Test of Adult Basic Education (TABE) and Comprehensive Adult Student Assessment System (CASAS) training and are certified to administer the assessments to career seekers accessing our system. These assessments assist Career Center staff in determining the need for referral to our adult education and literacy partners. Career Centers and local adult education and literacy programs make cross referrals and share cross-referral outcomes to support the goals of WIOA and increase student access and achievement. CSRC staff visit local adult education facilities to provide information to students

and instructors about our resources. CSRC, in partnership with local employers, collaborate with adult education and literacy to develop career pathways for high demand careers in the LWDA.

Strong partnerships with the local school systems provide industry sector focus for youth of the LWDA. CSRC's WIOA Youth program targets Career and Professional Education Act (CAPE) Academy students and works closely with the schools' Career Specialist to emphasize career pathways in targeted industries. The WIOA Youth program provides youth work experiences in targeted industries with occupations in demand. CSRC also collaborates with the local school districts to provide endorsement of the industry certifications offered through their curriculums.

(7) Reduction of Welfare Dependency: Describe how the local board coordinates workforce investment activities to reduce welfare dependency, particularly how services are delivered to TANF and Supplemental Nutrition Assistance Program (SNAP) recipients, to help individuals become self-sufficient.

Temporary Assistance for Needy Families (TANF)

WT Program participants receive a variety of career services through the one-stop delivery system including career exploration, career counseling and planning, assisted job search, job referrals, job development, referrals to workforce preparation workshops, and federal bonding services. Participants are assigned to community service and work experience activities to teach and/or strengthen basic job skills. CSRC offers access to Rosetta Stone® education software to all WT Program participants demonstrating a language barrier. An Individual Responsibility Plan (IRP) is created with WT participants to identify specific career and education goals and steps to work toward self-sufficiency. Formal assessments are administered to assist in making career pathway choices and to determine aptitude and suitability for training. The LWDA's established referral process is utilized for GED, ESOL, post-secondary classroom training, and for the variety of programs and services available through partner organizations.

WT participants are provided with support services to assist with overcoming barriers to education and employment. Support services include, but are not limited to, assistance with childcare, assistance with the cost of childcare registration fees and monthly parent co-payment, incentives, vehicle repair, gas assistance, vehicle insurance, work related tools/equipment, licensure fees, background screenings, and uniforms.

WT participants are often co-enrolled in WIOA to enhance training opportunities as the WT Program offers a wide variety of support services. Classroom training and OJTs are a coordinated effort between programs.

Supplemental Nutrition Assistance Program (SNAP)

SNAP offers online job readiness and education courses, assisted job search, referrals to workforce preparation workshops, and community service/work experience opportunities. SNAP participants may be co-enrolled in the WIOA Adult/Dislocated Workers and/or Youth services programs for education and training opportunities. Participants are referred to community partner organizations for adult education/literacy training, legal assistance, and housing. Participants of the SNAP program are provided with assistance for transportation costs incurred related to participation through the Food Stamp Reimbursement (FSR) program. Eligible SNAP participants are provided with Employment Retention Services to assist with transportation costs, uniforms, and work-related equipment or supplies.

F.A.T.E.S. Demonstration Project (2Gen)

Approximately 45% of children in Florida are from low-income households with parents who work. Childcare stands out as the single most important social service because of its impact on the entire family as well as the economic benefit to employers and communities. Childcare is an instrumental support, both in the reduction of stress and in the opportunity to work, for parents to achieve higher credentials through education and training leading to economic and family stability. Although work support benefits associated with the Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) have helped recipients maintain employment and survive on limited incomes, often the programs paradoxically create disincentives for progression along a wage or career path necessary to lift a household permanently out of poverty.

Low income families experience considerable disincentives to progress in their wage earning and asset building when an increase in income will disqualify the household from continued access to supportive programs and will result in a financial loss. Research calls attention to these "cliff effects" as a particularly

problematic disincentive associated with many work support policies. Evidence that cliff effects undermine anti-poverty programs is of increasing concern to early childhood practitioners and the workforce development programs. To meet the needs of children and parents simultaneously, the package of workforce development services and childcare benefits must be streamlined and coordinated for ease of access to families. Programs that encourage education, skill development, and career pathways will help move families toward long-term economic stability.

Evolution in workforce development and childcare policies triggered by the federal guidelines specified in the Workforce Innovation and Opportunity Act (WIOA) and the Child Care Development Fund (CCDF) reauthorization provided context for a proposed partnership between CareerSource Broward, CareerSource Palm Beach County and CareerSource Research Coast, and the Early Learning Coalitions and Children's Services Councils that serve these areas. An invited grant application to the W. K. Kellogg Foundation is expected to provide $1.2 million of the demonstration project's $2 million budget. As part of a regional initiative, CSRC requested and received funding under the Pathways to Prosperity Initiative as part of a four-region initiative to address a portion of the total $800,000 funding gap.

Thirty (30) low income families in Martin and St. Lucie Counties are to be served. The model uniquely highlights the mitigation of fiscal cliffs as a critical relief valve for families. Two complementary elements shape the project: (1) the integration of a phase-out period to mitigate the fiscal cliff created by the abrupt termination of childcare benefits and (2) career readiness combined with sector strategies to encourage wage progression of target families. The two-generation approach provides opportunities for and meets the needs of children and their parents together. Coordinating WIOA, TANF, and other resources to incentivize partnerships with childcare providers that deliver high quality childcare increases the likelihood of positive outcomes for children, including better academic achievement and ultimately financial well-being as adults. In alignment with CareerSource Florida's goal of reducing welfare, opportunities are being created for low-income families to join and succeed in today's workforce by supporting the coordination of human service providers, workforce training, and post-secondary programs.

(8) Cooperative Agreements: Describe the replicated cooperative agreements (as defined in WIOA section 107(d)(ii)) between the local board or other local entities described in section 101(a)(11)(B) of the Rehabilitation Act of 1973 (29 U.S.C 721(a)(11)(B)) and the local office of a designated state agency or designated state unit administering programs carried out under Title I of such Act (29 U.S.C. 721(a)(11) with respect to efforts that enhance the provision of services to individuals with disabilities and to other individuals, such as cross-training staff, technical assistance, use and sharing of information, cooperative efforts with employers and other efforts of cooperation, collaboration and coordination.

A MOU for the LWDA's Comprehensive One-Stop Career Center was developed between CSRC, the Workforce Consortium of the Treasure Coast and the Required Partners which became effective January 1, 2018. As part of the WIOA implementation with core partners and in developing CSRC's Comprehensive One-Stop Career Center, the following WIOA required core partners were included:

1. WIOA Adult, Dislocated Worker, Youth Programs and Youth Build
2. MSFW Program
3. Wagner-Peyser Act services
4. TAA activities
5. TANF
6. Jobs for Veterans State Grant
7. Community Services Block Grant employment and training activities
8. Programs authorized under Florida unemployment compensation laws
9. Adult Education and Literacy activities authorized under title II of WIOA
10. Vocational Rehabilitation Program
11. Career and Technical Education Programs authorized under the Carl D. Perkins and Technical Education Act of 2006
12. Division of Blind Services
13. Senior Community Service Employment Program

Two of the required core partners in the LWDA, the Department of Housing and Urban Development (HUD) and the Programs authorized under Sec. 21 of the Second Chance Act of 2007, have provided documentation to CSRC that they do not carry out employment and training activities in the LWDA. Through the CSRC Comprehensive One Stop Career Center, these programs and their providers will ensure that employers and career seekers become a shared client base across the core programs for the purpose of providing access to information and services that lead to career pathways and positive employment outcomes

CSRC does have a formal MOU with the local HUD Program and does work closely with the Re-Entry programs in the LWDA, however each is not included in our Comprehensive One-Stop Career Center MOU and the required Infrastructure Funding Agreement (IFA).

As core program partners in the CSRC One-Stop delivery system, the Umbrella MOU includes the following roles and responsibilities of the partnership that will enhance the provision of services to individuals with disabilities:

- The resources of each partner is outlined and their core responsibilities explained
- Sharing of resources in order to provide a continuum of services appropriate for the needs of everyone
- Referral procedures between the partners
- Communication of information for shared customers
- Coordination for the funding of the infrastructure costs of the Comprehensive One-Stop Career Center and the funding of shared services and operating costs
- Reporting of data to track performance outcomes
- Coordination of operational policies and procedures
- Cross-training of partner program staff
- Establishment and provision of partner meetings to share information, evaluate progress and performance outcomes, identify issues and improve the partnership
- Incorporation of an integrated and aligned business services approach between the partnership in order to present a unified voice for the workforce system in its communications with employers for hiring individuals with disabilities
- Provision of feedback to partner program management regarding the performance of the partnership including its effectiveness and success
- Provision and sharing of marketing materials to facilitate appropriate cross referrals
- Support to staff to ensure full integration of services are delivered through the CSRC One-Stop Career Center System
- Provision for amendments/updates to the MOU

DESCRIPTION OF THE LOCAL ONE-STOP SYSTEM

(1) General System Description: Describe the one-stop delivery system in your local area, including the roles and resource contributions of one-stop partners (WIOA §108(b)(6)).

CSRC develops and maintains a seamless system of integrated services that assures career seekers and employers have access to a comprehensive array of services and supports. CSRC works closely with mandated partners and other local stakeholders to coordinate the delivery of the services that are needed. Mandated partners are represented on the LWDB 20 Board of Directors and actively participate in committees of LWDB 20, cross-referrals, attendance at community-wide events and partner information sharing meetings are held to address service gaps, leverage resources, and improve efficacy.

Within its service delivery methods, CSRC integrates all required partner programs identified in WIOA in full-service locations and the CSRC Comprehensive One-Stop Career Center centrally located in the LWDA. Cross program alignment and integration of services is promoted so that career seekers have easy access to all programs at any point of entry into the system, either by direct service or partner referral.

A. Describe how required WIOA partners contribute to your planning and implementation efforts. If any required partner is not involved, explain the reason.

All required partners under WIOA, with two exceptions, were engaged in the process of developing the Umbrella MOU for the Comprehensive One-Stop Career Center and the addendums that detail each respective organization's programs and services, as well as their financial contributions to the Comprehensive One-Stop Career Center under the IFA. Each of these core partners participated in a planning meeting to discuss the WIOA implementation of the Comprehensive One-Stop Career Center. Additional planning meetings were scheduled with each partner to finalize the logistics of service delivery in the Comprehensive One-Stop Career Center. Each partner also participates in an annual cross training for all staff and partners of the Comprehensive One-Stop Career Center to ensure all staff and partners are aware of and familiar with the array of available programs and services. Quarterly meetings are also held to include all partners, including the staff delivering the services. During the meeting, every partner can share information with the group. Feedback is also provided regarding the shared referral process, to include frequency of use, customer satisfaction feedback, and timeliness of follow up.

The Department of Housing and Urban Development (HUD) and the Second Chance Re-Entry Programs are not represented in the Comprehensive One-Stop Career Center as neither entity receives funding for employment and training in the LWDA and as such, have made no contribution to the planning or implementation and will have no physical presence in the Comprehensive One-Stop Career Center. CSRC does partner with and make referrals to HUD and there is a formal, separate MOU in place. The MOU outlines the goals of the partnership and the services provided to include the responsibilities of each partner program. CSRC also partners with the Re-Entry Programs in the LWDA. The partnership involves cross referrals and CSRC visits to local prisons/jails where CSRC staff hold employment workshops and present orientations about programs and services available to inmates.

B. Identify any additional partners included in the local one-stop delivery system.

In addition to the mandatory WIOA partners, CSRC recognizes the importance of regional strategic planning and fully participates as a key member in numerous community-wide initiatives to build regional capacity and implement positive change. These initiatives were well received by the community, cemented partnerships between workforce, education, government and business and paved the way for future endeavors. Some examples of collaboration with public and private partners include:

1. The Workforce Readiness Taskforce
2. The Treasure Coast Builders Association
3. The Treasure Coast Manufacturer's Association
4. The Green Collar Task Force, a collaboration of representatives from St. Lucie County, CSRC, a consortium of eight trade unions and a green-collar building/construction jobs apprenticeship project was developed for the LWDA. The Green Collar Task Force and the apprenticeship programs offered through the project are still in operation training new and employed workers to meet the future labor needs of green technology businesses within the LWDA

Other non-required partners provided through the One-Stop Career Center delivery system include many community-based organizations within the LWDA such as: Boys & Girls Club, City of Fellsmere, City of Fort Pierce, City of Sebastian, City of Stuart Police Department, Department of Juvenile Justice, Devereux, Early Learning Coalitions, Economic Opportunities Council, Indian River County Sheriff's Department, local chambers of commerce, Mustard Seed, Restoring the Village Gang Initiative, Children's Services Councils, Treasure Coast Homeless Service Council and United Against Poverty.

CSRC staff actively attend committee, board, and regularly scheduled meetings in the community. Some of these community-based organizations include Business Alliance Partnership of St. Lucie County, Economic Development Council of St. Lucie County, Business Development Board of Martin County, Early Learning Coalition of Indian River, Martin and Okeechobee Counties, Council of Social Agencies St. Lucie County, Early Learning Coalition of St. Lucie County, Roundtable of St. Lucie County, Indian River County Economic Development Council, Local Coordinating Board of the Transportation Disadvantaged of Indian River, St. Lucie, and Martin Counties, Professional Business Women St. Lucie County, St. Lucie County Education Foundation, St. Lucie County Extension Advisory Council, Indian River and St. Lucie County Chambers of Commerce, The Enterprise Zone Development Agency Ad-Hoc Committee –Martin County, Martin County Interagency Coalition, Treasure Coast Council of Local Governments, Treasure Coast Human Resources Association, Treasure Coast Manufacturers Association, Treasure Coast Builders Association, United Way and Veterans Court St. Lucie County.

C. The local workforce development board, with the agreement of the chief elected official, shall develop and enter into a Memorandum of Understanding (MOU) between the local board and the one-stop partners.

Please see Attachment A – Executed Comprehensive One Stop Career Center MOU-IFAs

(2) Customer Access: Describe actions taken by the LWDB to promote maximum integration of service delivery through the one-stop delivery system for both business customers and individual customers.

CSRC is dedicated to meeting the needs of unemployed and underemployed workers, career seekers needing assistance with career decisions, skill training and job connections, and offers them career, basic, individualized, follow-up and training intensive services, as well as referrals to core partners. CSRC provides a match between the employer looking for qualified candidates and the career seeker needing employment. Programs and services for both groups include:

- Resource Room and Internet Access
- Re-Employment Assistance
- Career Exploration
- Career Fairs
- Hiring Events
- Career Resources
- Interest, Skill, and Aptitude assessments
- Employability Skills Workshops
- Opportunities for training, to upgrade skills and learn emerging skills
- Financial Aid
- Job Search Skills
- Networking Opportunities
- Referrals to core partners and other community-based organizations

CSRC strives for a seamless system to ensure career seekers and employers have access to a comprehensive array of services and support. Outreach and recruitment for the general population enlists the following strategies:

- Website access at www.careeersourcerc.com provides information about services and easy entry to Employ Florida. The website is updated frequently providing current employment news and information.
- LinkedIn
- Facebook
- Twitter
- YouTube

- Workforce TV
- Printed media, news releases, flyers and brochures
- Career fairs and events
- Community meetings and partnerships

Career services are provided to all career seekers regardless of program eligibility. Basic, individualized, follow-up and training services are provided to career seekers based on need. Specialized customer groups vary in need; outreach and services are adjusted accordingly. Universal career seekers are invited to use the resource room self-services. Frontline staff, to include core partner staff at the CSRC Comprehensive One-Stop Career Center, in the resource rooms provide information about the programs offered through the system. Computers are user friendly and brochures provide additional information about programs and services. Information is also provided on accessing Employ Florida from outside any of the CSRC Career Centers. Career seekers may register from any computer and complete online assessments from a Career Center or from home, post resumes and conduct job searches. Employers may register, post-employment opportunities and conduct candidate searches. Career center and partner staff in the CSRC Comprehensive One-Stop Career Center provide additional levels of service including information about labor market information and targeted occupations. To promote integration of business services delivery through the one stop system, the CSRC Business Services team works diligently to engage business customers by providing employer services, such as job fairs, recruitment events, grants and Labor Market Information. The Business Services team also provides the following to promote maximum integration of service delivery.

- Gather labor market intelligence and provide data to business services.
- Provide information about workforce related topics and services to companies and make appropriate referrals.
- Serve as an intermediary to other economic development activities and entities.
- Provide feedback to business customers about regional skills gaps, program development, and evaluation of the market we serve.
- Work with local and regional economic development professionals in business retention, and expansion activities as needed.
- Education of business customers about CSRC's goal of advancing a sector based, business driven system.
- Manage job orders from participating employers in job matching system.
- Work on skills development with promotion and implementation of OJT's, Internships and Apprenticeships.
- Assure adequate job opportunities to meet the needs of career seekers in any of the Career Centers.

A. Describe how entities within the one-stop delivery system, including one-stop operators and one-stop partners comply with the Americans with Disabilities Act regarding physical and programmatic accessibility of facilities, programs and services, technology and materials for individuals with disabilities, including providing staff training and support for addressing needs of individuals with disabilities. Describe how the LWDB incorporates feedback received during consultations with local Independent Living Centers on compliance with Section 188 of WIOA (WIOA §108(b)(6)(C)).

All CSRC Career Centers are ADA compliant. Career seekers with disabilities are considered universal customers and have access to all services and programs in all centers. Customers with disabilities who require auxiliary aids and services are provided such upon request. Adaptive services include screen reading software and screen magnification software. Cross training for frontline staff at all the CSRC Career Centers is provided to accommodate individuals with disabilities. CSRC has also hosted agencies such as the Division of Blind Services, Council on Aging and Vocational Rehabilitation to provide sensitivity training to all staff.

The Disability Navigator also regularly visits all Career Centers and provides training on the Ticket to Work Program as well as strategies for working with individuals with disabilities. He is available

to staff to answer questions and provide guidance regarding the provision of services to this population of career seekers.

B. Describe how entities within the one-stop delivery system use principles of universal design in their operation.

CSRC and their One-Stop partners make every attempt to accommodate the needs of the diverse range of clients served. Examples of some steps that are taken to incorporate principles of universal design in CSRC operations are:

Equitable Use

- During group orientations, all career seekers are asked if they require additional assistance to fully access CSRC services; no assumptions are made about career seekers' abilities, irrespective of how they present themselves.
- Space is available in each center for staff to engage with career seekers privately.
- Information is equally, and standardly distributed to all career seekers.

Flexibility in Use

- Skills testing and assessments can be completed by career seeker either online or on paper.
- Marketing materials are provided in paper and electronic formats.

Simple and Intuitive

- CSRC communicates important information to career seekers in English, Spanish and Creole. In each access location, career seekers check in on a computer using an interactive, automated scan card process.

Perceptible Information

- Employability workshops incorporate a variety of media. Information is presented verbally and supported by graphic presentation. Career seekers are also given handouts with information relative to the topic.
- In the resource room of each CSRC Career Center, large TVs streaming "CareerSource Research Coast Workforce TV" are strategically mounted to ensure high visibility by visitors. Workforce TV displays information about upcoming events, hot jobs, tips for career seekers and general information about the Career Center. The information on the screens is displayed graphically and closed captioned and the TV's also have sound capabilities.

Tolerance for Error

- All computers are configured so that career seekers cannot inadvertently change settings. As special circumstances occur, accommodations are made as appropriate for their specific needs. CSRC staff are assigned to the resource rooms of our Career Centers to make accommodations as needed.

Low Physical Effort

- Adjustable chairs are provided for all workstations and workshop classrooms.
- Printers are available to career seekers to print information instead of copying by hand.

Size and Space for Approach and Use

- Group meeting and workshops are held in large rooms to accommodate interpretive services as well as wheelchairs. Workshop rooms are arranged in a manner that allows the instructor to be seen by all workshop participants.
- Resource materials are available in places and heights that are accessible to all

C. Describe how the LWDB facilitates access to services provided through the local delivery system, including remote areas, using technology and other means (WIOA §108(b)(6)(B)).

CSRC provides virtual services, full-service career centers, and one Comprehensive One-Stop Career Center. Full-service centers are located in each county within the LWDA, and the Comprehensive One-Stop Career Center is centrally located in St. Lucie County.

Virtual services are available by accessing our website where individuals can register for upcoming events, get information about programs and services and contact information. CSRC also provides career seekers with Skype® access to connect with core partners of the Comprehensive One-Stop Career Center and provides a resource for them to use for virtual employment interviews.

CSRC has two full service mobile units that are deployed as needed into outlying communities within the LWDA to provide easy access to those residents. The mobile units are also utilized for community events as well as hiring events to service those attending.

(3) Integration of Services: Describe how one-stop career centers implemented and transitioned to an integrated, technology-enabled intake and case management information system for programs carried out under WIOA and programs carried out by one-stop career center partners (WIOA §108(b)(21)).

CSRC embraces the use of technology to improve efficiency, streamline service delivery and provide quality case management. Whenever possible, technology is incorporated in processes to improve career seeker and customer service delivery. Examples include:

- At all access locations, scan cards are utilized to streamline career seeker check-ins and avoid bottlenecks at the reception desk.
- Career seekers can pre-register for hiring events and employability workshops on the CSRC website. (Google forms/database management to engage registrants)
- Formal referral process utilizing Google applications to track client referrals to/from all partner programs.
- Web-based assessments available to career seekers to determine career seekers' transferable skills and skill gaps.
- DocuSign can be used during certain phases of the development and execution of work-based training plans and agreements. An example is an OJT with CVS Distribution in which their training and supervision staff is located locally but the individual responsible for signing agreements is national and located in another state.
- Prior to coming to a career center, career-seekers interested in training services can complete a Google-based Interest Form that directs them to register in Employ Florida and update their work history, education background and resume; view CSRC's Local Targeted Occupations List (LTOL) and Eligible Training Provider List (ETPL); and tell what type of training and industry they are you interested in pursuing, and why.

For testing and assessments, CSRC utilizes technology such as Kenexa Prove-It, CareerScope, My Next Move, BestWorks Data, McGraw Hill's TABE Online Assessment System and CASAS. CSRC utilizes the One-Stop Service Tracking (OSST), Employ Florida, SalesForce, FLORIDA, FWIPRS and Gazelle (financial ITA tracking system) to collect data, track and report local performance measures and program activity. CSRC also utilizes Docuphase for server-based file/document storage. In addition, CSRC utilizes local and state data-based queries with approved access to the State data warehouse to help manage performance

(4) Competitive Selection of OSO: Describe steps taken to ensure a competitive process for selection of the one-stop operator(s) (WIOA §121(d)(2)(A)).

On March 28, 2019, CSR released a One-Stop Operator RFP to accept proposals from vendors for the period of July 1, 2019 through June 30, 2021. CSRC conducted an open and competitive procurement process, fully compliant with CSRC's local procurement policies outlined in the CSRC Administrative Plan and consistent with the procurement standards of the Uniform Guidance at 2 CFR 200.318 through 200.326. CSRC requested and received a list and contact information of the State's LWDB One-Stop Operators and emailed each of them the One-Stop Operator RFP in addition to publicly advertising the RFP and the utilization of CSRC's vendor list.

CSRC received one proposal for the One-Stop Operator RFP. The proposal passed technical review and was rated by a team consisting of two CSRC administrative staff and one CSRC Board member. Based upon the review of the rating team and the cumulative rating score, the rating team recommended the proposal not be approved.

At CSRC's May 29, 2019 Board of Directors meeting, the recommendation to not approve the proposal received for the One-Stop Operator was passed. The Board of Directors also approved for CSRC administrative staff to request approval from the Governor and the local Chief Elected Official allowing CSRC to serve as the One-Stop Operator for LWDB 20. CSRC's request to operate as a One Stop Operator was approved at the CareerSource Florida Board of Director's meeting on September 12, 2019.

(5) System Improvement: Describe additional criteria or higher levels of service than required to respond to education/training needs, labor market, economic, and demographic conditions and trends in the local area (WIOA §108(b)(6)(A)).

- CSRC serves as an apprenticeship sponsor and works with industry representatives and local businesses to develop needed apprenticeship training programs. CSRC's current registered apprenticeship programs are in Industrial Manufacturing Technician, Truss Design Technician and Distribution Logistics Technician.
- CSRC, the Indian River County Economic Development and area manufacturers collaborate with the Treasure Coast Technical College, Vero Beach, to develop a one-week manufacturing boot camp, to serve an underrepresented population of Indian River County and provide a mechanism for marketing apprenticeship opportunities available locally. The boot camps include tours at local manufacturing sites, hands-on activities, and soft skills to build a foundation on the benefits of a career path in manufacturing. There are slots allotted for graduating high school seniors selected through an application process. These individuals are offered the opportunity to go directly into the IMT Registered Apprenticeship, earning while they learn.
- State of Jobs Conference, an industry driven half-day conference brings together 600 plus high school Juniors and Seniors to explore post-secondary training options, and career path opportunities in various industry sectors in demand. The conference features keynote speakers and sector industry leaders who engage students with career path opportunities, leadership skills, career readiness and financial aid information
- In order to start building talent pipelines to meet the needs of sectors in demand, CSRC serves as a convener for the area's Workforce Readiness Taskforce, which together economic development agencies, educational providers, business leaders representing industry sectors in demand and community partners. The mission of this industry-led taskforce is to organize processes and leverage resources to support a focused sector-based talent development pipeline to meet the needs of employers and career seekers throughout the LWDA.
- CSRC is a partner of the Lincoln Park Common Good Initiative , a collaboration of Allegany Franciscan Ministries along with community residents and stakeholders to create opportunities, develop strategies and make investments that lead to positive life outcomes for people in Lincoln Park, an under-resourced community in Fort Pierce. In partnership with Lincoln Park Common Good Initiative, the Lincoln Park Career Pathways Initiative (LPCPI) was developed to provide career training and supportive services for participants in the initiative's manufacturing, logistics and health care training. CSRC works closely with economic development partners to develop employment opportunities for the participants who successfully complete the training and gain industry certifications. In October 2019, CSRC conducted a successful hiring event for the LPCPI participants in which fifteen area employers from the industries participated. The event was held in partnership with EDCSLC, the Treasure Coast Manufacturing Association, the City of Ft. Pierce and Indian River State College. In addition, LPCPI participants are given early entrance into the annual City of Fort Pierce Job Fair spearheaded by CSRC. The annual job fair brings together 100 employers and has historically drawn up to a thousand career seekers.
- Summer of Success (SOS) is an innovative eight-week work-readiness training program consisting of soft skills training and work experience through paid internship. Youth ages 16-24 who reside within the participating County may apply. Priority of enrollment in Summer of Success is given, but not limited to, youth facing life barriers such as: criminal offenders, pregnant or parenting youth, youth with disabilities, youth living in a high poverty area, or youth identified as at-risk for street gang activity. SOS provides many young people with their first experience in the workplace, and every step from the online application

to the exit evaluation at the end of the program is designed to closely mimic actual employment. Once the internship is complete, the participant will have positioned themselves to enter a Pre-Apprenticeship, Apprenticeship or OJT opportunity which will lead to increased wages, additional training, and nationally recognized certifications.

- CSRC sponsored a TANF Summer Youth Program from May 1, 2019 through August 9, 2019 that promoted job preparation and employment for low income youth ages fourteen to eighteen. After a formal Request for Quote was issued, the Boys and Girls Club of St. Lucie County was selected as the subrecipient for the funding. The summer activity program provided eighty-five youth, during the summer break from school, opportunities for career exploration, academic and occupational education, job shadowing, and skill development. In addition to classroom activities, youth participated in college and trade school tours, career tours to local prospective employers, and enrichment trips.
- In conjunction with the Children Services Councils and the Early Learning Coalitions and along with three additional LWDBs, CSRC was selected to participate in the F.A.T.E.S. Demonstration Project (2Gen). As part of a regional initiative, CSRC received funding under the Pathways to Prosperity Initiative to offer individualized career services to a cohort of thirty families in targeted neighborhoods within census tract areas of greatest poverty. Basic and intensive WIOA services, focusing on CSRC's sector strategies, are provided to select families receiving subsidized childcare to encourage career advancement and wage progression. These target families may be provided with career readiness and advancement counseling, coaching, soft-skills development, assistance with training and education, assistance with the cost of transportation, and job placement. Low-income families often experience a disincentive to progress in their wage earning and asset building when an increase in income will disqualify the household from continued access to supportive programs, such as affordable childcare. The design of the F.A.T.E.S. Demonstration Project (2Gen) included addressing this "cliff effect" by integrating a three-year phase-out period to mitigate the fiscal cliff created by the abrupt termination of childcare benefits after reaching the maximum allowable household income.
- CSRC is a partner of the Building Fort Pierce YouthBuild Initiative. Indian River State College applied for and was awarded a Youth Build grant and CSRC is a required key partner of the grant. Building Fort Pierce encompasses targets 16 to 24-year old participants who have dropped out of school. YouthBuild participants are required to attend GED, Vocational and college classes while building Habitat for Humanity homes. At the completion of the training, students will:
  - Obtain a High School diploma or GED
  - Obtain Construction Industry-Recognized Certifications (NCCER I and II)
  - Obtain a safety OSHA10 certificate;
  - Establish a career path by articulating obtained certifications with a PSAV College Certificate, and earning college credit toward an AS degree in Building Construction Technology;
  - Solve problems using critical thinking skills, creativity, and innovation;
  - Use information technology tools;
  - Describe the importance of professional ethics and legal responsibilities;
  - Demonstrate personal money-management concepts, procedures and strategies;
  - Demonstrate leadership and teamwork skills needed to accomplish goals and objectives;
  - Explain the importance of employability and entrepreneurship skills;
  - Understand energy-efficient techniques for renovating an existing building;
  - Understand fundamental principles of electrical and plumbing installations;
  - Understand fundamental principles of Air Conditioning systems and installations;
  - Obtain the skills to find sustainable, gainful employment.
- CSRC holds annual events in the community to include partnering with the City of Ft. Pierce for their signature event, The City of Ft. Pierce Job Fair. Each year it continues to be a success bringing in hundreds of career seekers and up to 130 businesses and community partners.
- The Homeless Veterans Stand Down is held each year focusing on the local homeless Veteran population providing them with food, clothing, mobile showers, health screenings, haircuts, legal services, and much more.

DESCRIPTION OF PROGRAM SERVICES

(1) System Description: Describe the local workforce development system**.** Identify programs included in the system and how the local board works with each entity to carry out core programs and other workforce development programs supporting alignment in provision of services. Identify programs of study authorized under The Strengthening Career and Technical Education for the 21st Century Act (Perkins V) (20 U.S.C. 2301 et seq.), that support the strategy identified in the Florida Unified Plan under WIOA section 102(b)(1)(E) (WIOA §108(b)(2)).

CSRC is the administrative entity, grant recipient and fiscal agent for the workforce development funds allocated to Indian River, Martin and St. Lucie counties. As so, CSRC plans and oversees the local workforce development programs in partnership with local elected officials, procures service providers, as needed, identifies providers of training services, negotiates local performance measures and monitors system performance against the established performance measures, and manages accounts for all workforce funding allocated.

Specifics defining the core programs that are included in the system and a description of how CSRC works with each entity to support alignment in provision of services is provided in the Coordination of Services section of this updated plan, item number eight (8).

Specifics defining other Community Based programs identified in the Description of the Local One-Stop System section of this updated plan, item number one (1)(B) that participate in the operation of the CSRC one-stop career system through joint agreements, memoranda of understanding and joint planning. All programs and activities in the CSRC one-stop career center system are coordinated and have an integrated service delivery structure to facilitate improved outcomes and excellent customer experiences for both employers and career seekers.

CSRC employs universal design principles in the operations of the career centers to facilitate access to include partner programs and community-based organizations who serve individuals with barriers/obstacles to employment. CSRC staff and core partner program staff in the Comprehensive One-Stop Career Center, who interface with career seekers, are cross-trained on all core programs and are familiar with the resources and support services provided by community organizations. This strategy facilitates co-enrollment in programs, the development of career pathways and improves access to activities that lead to post-secondary and industry recognized credentials. Registered Apprenticeships are promoted as growth opportunities.
CSRC considers business as the primary customer of the LWDA. The CSRC service delivery is employer driven and integrates economic development and educational partners within the LWDA. CSRC's goal is to prepare a skilled workforce for existing and emerging in-demand occupations in order to meet the employment needs of business in the LWDA.

Enhanced LWDB 20 Board of Directors membership, which includes the core partner programs and business members of our targeted industries, allows CSRC to identify and address the education and skill needs of the local workforce and the specific needs of local employers

(2) Sub-grants and Contracts: Describe the competitive process used to award sub-grants and contracts in the local area for WIOA-funded activities (WIOA §108(b)(16)).

Please see Attachment D – CSRC Administrative Plan Section III – Procurement Policies & Procedures, Item N.

(3) Expanding Access to Employment: Describe how the local board, working with entities carrying out core programs, expanded access to employment, training, education and supportive services for eligible individuals, particularly eligible individuals with barriers to employment. This includes how the local board facilitates developing career pathways and co-enrollment, as appropriate, in core programs, and improves access to activities leading to recognized postsecondary credentials (including portable and stackable industry-recognized certificates or certifications) (WIOA §108(b)(3)).

In order to expand eligible career seekers' access to training and activities that lead to a career path, cross training of frontline staff is essential. CSRC frontline staff have been cross trained to understand the services, resources and eligibility requirements of all programs.

In July 2019, CSRC reorganized frontline staff's duties and combined them to remove silos with teams responsible for the initial intake, assessment, career planning, and job recruitment for career seekers accessing our Centers.

All CSRC and core partner staff in the Comprehensive One-Stop Career Center are cross trained to understand the services, resources and eligibility requirements of all available programs and services.

During the initial engagement with a career seeker, CSRC staff conduct a thorough intake assessment to identify skills, needs, and barriers and provide guidance and direction based on the unique situation of the client. WIOA implementation with core partners also provides greater opportunity to connect career seekers to employment, training, education and supportive services.

Career services are provided to all career seekers regardless of program eligibility. Designed to help career seekers overcome barriers and prepare for work or skills training, individualized, follow-up and training services are provided to career seekers based on need. Staff identifies the career seekers' needs through assessment and/or by assisting them to develop a career plan.

To support the full range of career seekers in acquiring the skills needed to attain jobs in high growth, high-wage industries and occupations, CSRC makes use of the Local Targeted Occupation List (LTOL) to identify and target training for those occupations in demand and with high potential growth. The list is disseminated directly and via the CSRC website to employers, training institutions and other partners to identify where the most training is needed to grow the local labor force. An Eligible Training Provider List (ETPL) is compiled listing approved training programs, training institutions, cost and requirements for career seekers enrolling in the chosen training program. Approved training programs must lead to post-secondary credential, degrees and/or industry-recognized certificates or certifications.

The Business Services Unit analyzes businesses' employment needs and identifies job opportunities. OJT's Internships, and Apprenticeships are other means of providing services to all career seekers, especially those with barriers to employment. These programs are very successful in assuring that career seekers have a better opportunity to be successful and obtain employment that will lead to self-sufficiency.

CSRC's WIOA Youth program works to expand access to employment, training, education, and support services for youth facing various barriers to employment in a variety of ways. CSRC WIOA Youth program works closely with community-based organizations and works with county operations to provide transportation services to youth participants. CSRC Youth Program Career Coaches assist with expanding employments opportunities in the private sectors such as the trade industry. CSRC has several platforms for occupational training that are offered virtually, such as customer service, food handling, and hospitality credentialing. CSRC facilitates the development of career pathways in the WIOA Youth program by implementing an incentive policy that streamlines activities in a strategic manner to promote skills gains as well as stackable and portable credential attainment leading youth towards the fulfillment of long-term career goals.

CSRC has expanded services to assist individuals with barriers develop career pathways as follows:

- CSRC's participation in the Lincoln Park Common Good Career Pathways Initiative project, as previously described. One of the goals of the initiative is to expand career pathway opportunities for residents and increase their awareness of and interest in CSRC's individualized career, training and supportive services.
- Summer of Success Program as described earlier: Priority of enrollment into the Summer of Success youth program is given, but not limited to, youth facing life barriers such as: criminal offenders, pregnant or parenting youth, youth with disabilities, youth living in a high poverty area, or youth identified as at-risk for street gang activity.

- CSRC's partnership in the Building Fort Pierce YouthBuild initiative, as described earlier
- CSRC's participating in the FATES Demonstration Project, as described earlier
- CSRC's sponsorship of a TANF Summer Youth Program, as described earlier

(4) Key Industry Sectors: Identify how the LWDB aligns resources that support and meet training and employment needs of key industry sectors in the local area. Describe strategic or other policies that align training initiatives and Individual Training Accounts (ITAs) to sector strategies and demand occupations (WIOA §134(c)(1)(A)(v))

CSRC, in partnership with industry leaders, economic development and educational providers, has developed a sector strategy implementation which:

- Aligns efforts and services to develop and implement comprehensive sector strategies to support CareerSource Florida's vision which states, "Florida will be the global leader for talent."
- Combines strategies and staffing to foster and strengthen the talent supply, growth and retention of existing businesses within the LWDA.
- Enhances existing networks between education, business and industry representatives, labor and other economic development partners to develop new and align existing programs and services with industry needs.
- Facilitates the development of industry-driven career pathways that prepare area residents for in-demand occupations to address the talent needs of targeted industry sectors.
- Supports system alignment, service integration, and continuous improvement using data to support evidence-based decision-making.
- Strengthens communication, coordination, and decision-making between area partners to meet labor market needs.
- Eliminates the unwarranted duplication of services to reduce administrative costs.
- Combines resources to provide career seekers with the tools, to include career assessments and financial support necessary to enter the talent pipeline in pursuit of self-sufficient career pathways.

All employer training is concentrated on industry sectors in demand for the LWDA: Healthcare; Manufacturing; Construction Trades; Distribution & Logistics. Two additional industries have been added to CSRC's targeted industries: Hospitality and Professional & Business Services and will be a focus for training going forward. Classroom training and Apprenticeship programs are provided for occupations in demand and for those occupations which exhibit job growth.

CSRC has developed ITA, OJT, Internship and IWT policies which specifically outline the processes and requirements to be used for these activities while ensuring that all career seekers can receive training that will lead to a pathway of self-sufficiency.

CSRC works closely with key industry leaders to develop training programs that align with their specific employment needs. For example, and WIOA eligible career seekers are encouraged to participate in class-size training opportunities and apprenticeship programs developed to meet . Labor market information is regularly examined to ensure that training opportunities are consistent with local job growth projections. CSRC's WIOA program continues to work towards initiatives that promote healthcare, manufacturing, trades, logistics, hospitality and professional & business services-industry growth emerging in the LWDA.

As a result of the first study in 2016, CSRC formed a Workforce Readiness Taskforce by convening economic development agencies, educational providers and industry leaders representing the sectors in demand. The mission of this industry led taskforce is to organize processes and leverage resources to support a focused sector-based talent development pipeline to meet the needs of employers and career seekers for the LWDA. CSRC serves as convener for the area's Workforce Readiness Taskforce, bringing together economic development agencies, educational providers, industry leaders representing sectors in demand and community partners. The mission of this industry led taskforce is to organize processes and leverage resources to support a focused sector-based talent development pipeline to meet the needs of employers and career seekers for the LWDA. The taskforce aligns workforce development strategy and partner resources to meet the needs of targeted industry sectors.

To accomplish this shared mission, the industry led taskforce is:

- Regionally based; focused and aligned with the LWDA's priority sectors.
- Driven by business industry representatives.
- A mechanism for industry partners and local area stakeholders to work together more proactively to support growth in these sectors.
- Supported by partner organizations including economic development, workforce development, postsecondary education, K12 education, and other industry and community-based organizations.

The Workforce Readiness Taskforce seeks to:

- Develop an asset map featuring available training resources and services.
- Strengthen education and training programs by forming connections among public partners and businesses to meet employers' needs.
- Address occupational and soft skill gaps by facilitating the strategic recommendations resulting from the Treasure Coast's Skills Gap Study.
- Increase early student exposure to career-related education.
- Market career pathways to industries and career seekers
- Secure alternative funding and other resources to grow and sustain a pipeline of skilled, qualified workers to meet the needs of targeted sectors.

The sector specific committees within the taskforce focus on the different aspects of strategy implementation and will provide feedback on the problems and indicators that are barriers/obstacles to CSRC's sector strategy implementation objectives.

CSRC's Strategic Initiatives team actively seeks financial resources to help support sector driven initiatives. Employers participating in CSRC's apprenticeships contribute an annual fee per apprentice to help offset the cost of training and support services for those career seekers not eligible and/or suitable for WIOA. CSRC also hosts the State of Jobs Conference (SOJC), the industry driven half-day conference brings together 600 plus high school Juniors and Seniors to explore post-secondary training options, and career path opportunities in various industry sectors in demand. The conference features keynote speakers and sector industry leaders who engage students with career path opportunities, leadership skills, career readiness and financial aid information.

CSRC funds and supports Clinical Nurse Residency Programs to help new nurses' transition to the role of registered nurse. The training provides informal mentoring, coaching and learning through a structured, professional, transition-into-practice experience that is customized to meet individual developmental needs of graduate nurses. Because CSRC funding offsets the extraordinary costs of training, area hospitals can build regional capacity through the recruitment and training of multiple cohorts of graduate nurses.

Utilizing a training contract and in accordance with WIOA and CSRC's Local Plan, CSRC addresses the needs of at risk and economically disadvantaged adults by supporting the Treasure Coast Food Bank's Culinary Training Program. The culinary and life skills training prepares participants to be successful in the hospitality sector. The short term 12-week program is led by an Executive Chef, who is a certified educator in the State of Florida. The training course is anchored around Work-Based Learning (WBL) and pedagogical principles that combine traditional classroom instruction utilizing the American Culinary Federation (ACF) curriculum, experiential learning in a professional culinary production kitchen, and a two-week internship with a local restaurant or human services organization. The training results in two industry recognized certifications, the Certified Fundamentals Cook by the American Culinary Federation and the Certified Guest Service Professionals, by the American Hotel and Lodging Association.

(5) Industry Partnerships: Describe how the LWDB identifies and collaborates with existing key industry partners in the local area. Describe how the LWDB coordinates and invests in partnership infrastructure where key industry partnerships are not yet developed (WIOA §134(c)(1)(A)(iv)). The local area must describe how the following elements are incorporated into its local strategy and operational sector strategy policy:

A. Describe how selected industries or sectors are selected based on, and driven by, high-quality data (cite data source used);
B. Describe how sector strategies are founded on a shared/regional vision;
C. Describe how the local area ensures that the sector strategies are driven by industry;
D. Describe how the local area ensures that sector strategies lead to strategic alignment of service delivery systems;
E. Describe how the local area transforms services delivered to career seekers/workers and employers through sector strategies: and
F. Describe how the local area measures, improves and sustains sector strategies.

Responses to (5) (A-F) are below:

CSRC combines labor market analysis from Economic Modeling Specialists International (EMSI) and The Conference Board Help Wanted Online with input from area industry leaders to identify target sectors. Using high quality data and the reported industry labor market activity, the sectors identified include healthcare, construction trades, manufacturing and distribution logistics, hospitality, and professional and business services. To ensure that education and training opportunities stay aligned with the needs of the labor market CSRC uses a similar framework for identifying in-demand occupations. According to labor market data, the outlook for occupations in demand sectors is very strong, especially as the career seeker progress in a career pathway. CSRC has better aligned services delivered to career seekers and employers by emphasizing work-based learning as a priority to support sector strategy implementation. CSRC understands that work-based training is an important service for career seekers as it teaches job-specific skills and can directly connect career seekers to job opportunities.

To attain input from industry, in 2019 CSRC partnered with business sectors representatives, economic development councils, chambers of commerce, educational partners, labor and trade organizations to participate in a second Skills Gap Analysis Study. The study aimed to achieve the following objectives:

- Validate target industries for the LWDA in order to prioritize sectors for gap analysis;
- Conduct sector workforce demand analysis through interviews supported by quantitative data analysis;
- Compare supply to demand to identify gaps in regional education and training opportunities; and
- Validate the impact and effectives of strategies implemented by the Workforce Readiness Taskforce; and
- Provide additional recommendations to improve the regional labor force and grow the economy of the LWDA.

The second study focused on skills gap analysis for four industries – Healthcare, Manufacturing, Distribution Logistics and Construction Trades. The preliminary report resulting from the study, outlined strategies for continuing building a dynamic educational and training framework based on the input from community industry sector leaders. The recommendations outlined in the preliminary report focus on expanding existing partnerships and communication between education and business, expand the modalities for developing skills training, marketing and leadership strategies to broaden the regional talent pool.

As a result of the first study in 2016, CSRC formed a Workforce Readiness Taskforce by convening economic development agencies, educational providers and industry leaders representing the sectors in demand. The mission of this industry led taskforce is to organize processes and leverage resources to support a focused sector-based talent development pipeline to meet the needs of employers and career seekers for the LWDA.

CSRC serves as convener for the area's Workforce Readiness Taskforce, bringing together economic development agencies, educational providers, industry leaders representing sectors in demand and community partners. The mission of this industry led taskforce is to organize processes and leverage resources to support a focused sector-based talent development pipeline to meet the needs of employers and career seekers for the LWDA. The taskforce aligns workforce development strategy and partner resources to meet the needs of targeted industry sectors.

To accomplish this shared mission, the industry led taskforce is:

- Regionally based; focused and aligned with the LWDA's priority sectors.
- Driven by business industry representatives.
- A mechanism for industry partners and local area stakeholders to work together more proactively to support growth in these sectors.
- Supported by partner organizations including economic development, workforce development, postsecondary education, K12 education, and other industry and community-based organizations.

The Workforce Readiness Taskforce seeks to:

- Develop an asset map featuring available training resources and services.
- Strengthen education and training programs by forming connections among public partners and businesses to meet employers' needs.
- Address occupational and soft skill gaps by facilitating the strategic recommendations resulting from the Treasure Coast's Skills Gap Study.
- Increase early student exposure to career-related education.
- Market career pathways to industries and career seekers
- Secure alternative funding and other resources to grow and sustain a pipeline of skilled, qualified workers to meet the needs of targeted sectors.

The sector specific committees within the taskforce focus on the different aspects of strategy implementation and will provide feedback on the problems and indicators that are barriers/obstacles to CSRC's sector strategy implementation objectives.

CSRC's Strategic initiatives department actively seeks financial resources to help support sector driven initiatives. Employers participating in CSRC's apprenticeships contribute an annual fee per apprentice to help offset the cost of training and support services for WIOA ineligible career seekers. CSRC also hosts the State of Jobs Conference (SOJC), the industry driven half-day conference brings together 600 plus high school Juniors and Seniors to explore post-secondary training options, and career path opportunities in various industry sectors in demand. The conference features keynote speakers and sector industry leaders who engage students with career path opportunities, leadership skills, career readiness and financial aid information.

(6) In-demand Training: Describe how the local board ensures training provided is linked to in-demand industry sectors or occupations in the local area, or in another area to which a participant is willing to relocate (WIOA §134(c)(G)(iii)).

Through collaboration with other LWDAs, CSRC ensures that the training provided in the LWDA is linked to local and regional in-demand industry sectors and/or occupations, thus ensuring that for participants, willing to relocate, their training reflects the skill sets needed for occupations in demand. CSRC recognizes Florida's Demand Occupational List and quarterly establishes a minimum level of projected openings by occupation for training to be considered in the LWDA's LTOL.

CSRC makes use of National, State and Local Labor Market Analytics along with input from industry leaders, economic development organizations and job openings of local employers to identify occupations in-demand in order to educate career seekers regarding job trends, work requirements and requisites.

CSRC facilitates the development of future career pathways, certifications and apprenticeship programs through the collection of information about in-demand occupations in key industries.

CSRC's Strategic initiatives team works closely with employers and area industry associations in establishing new apprenticeships and work-based learning opportunities designed to support and sustain sector driven initiatives. CSRC has assisted in the development and local availability of Apprenticeships for Industrial Manufacturing Technicians, Pharmacy Technicians and Truss Designers, and continues to pursue expansion of Apprenticeship opportunities in the LWDA.

For youth ages 16-24, CSRC's WIOA Youth program utilizes the LTOL to identify employment and training needs locally. Training funds are then allocated based on targeted occupations with a solid job growth outlook. Information on targeted occupations in the LWDA is shared with WIOA Youth program participants to foster an understanding of economic growth as well as to encourage youth to strive for career pathways that are most likely to lead to self-sufficiency.

(7) Employer Engagement: Describe strategies and services used in the local area to:

A. Facilitate engagement of employers, including small employers and employers in in-demand industry sectors and occupations, in workforce development programs;

Employer engagement in the LWDA is facilitated by the Business Services Team who works diligently to educate business customers by providing information on financial incentives, cost savings and other advantages of using CSRC programs and services. The Business Services Team reaches out to businesses through contact lists developed from participation at job fairs, business development events, economic development activities, human resource associations, and local area chambers of commerce. Additionally, after verification, newly registered businesses in Employ Florida are engaged by a Local Veterans Employment Representative (LVER) to conduct outreach and to advocate for Veterans. A face to face meeting is set up to identify the needs of the business. Based on the needs identified in this meeting, a plan is developed utilizing CSRC services and programs. These services may include recruitment, OJT, IWT, apprenticeships and customized training provision for in-demand jobs or high growth industry sectors within the LWDA.

B. Support a local workforce development system that meets the needs of businesses in the local area;

CSRC ensures engagement access for businesses and career seekers to the service delivery system by providing the following:

- Recruitment and pre-screening of qualified applicants.
- Easy access to post job listings through Employ Florida.
- Information about job and industry growth trends and forecast information.
- Wage data and other valuable labor market information.
- Hiring and training incentives.
- A single point of contact to discuss training and hiring needs.
- Mapping of the talent pipelines for various sectors to identify where the talent is needed now and in the future.
- Increasing the quantity and quality of the workforce talent pool for the LWDA by defining career pathways for career seekers that will ensure a continuous supply of qualified talent.
- Communication of the in-demand skills needed by high growth industry sectors to educational and training organizations in order to improve responsiveness and better prepare workers for the sector.
- CSRC facilitates a very active business services team that proactively offers services to employers to meet the workforce needs of the LWDA.

C. Better coordinate workforce development programs and economic development; and,

The Strategic initiatives Team proactively develops community stakeholder awareness to identify and support shared workforce development priorities and collaborative opportunities. This team serves as a liaison with Economic Development Organizations, Industry Associations and other local area stakeholders. The team is also responsible for strategically building CSRC's fee-for-services initiatives to increase unrestricted funding revenue by expanding mutually beneficial collaborations with industry, education, community partners, government and other applicable institutions.

D. Strengthen linkages between the one-stop delivery system and unemployment insurance programs (WIOA §134(c)).

CSRC provides:

- RA claimants referrals to an array of training and education resources
- Enhanced career services including assistance with employability workshops, skills assessments, job referrals and WIOA eligibility screening for RA claimants.
- Assistance to employers in the LWDA for managing reductions in force in coordination with rapid response activities and with strategies for the aversion of layoffs and the delivery of employment and training activities.

(8) Priority of Service: Describe local policies and procedures to prioritize services for veterans, recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient for individualized career and training services in the adult program.

In accordance with WIOA, there is no sequence of service requirements for "career services" and training for Adults and Dislocated Workers. CSRC staff may determine training is appropriate regardless of whether the individual has received basic or individualized career services first. CSRC follows the guidelines outlined in WIOA which states that training services will be provided if the CSRC staff determine, after an interview, evaluation or assessment and career planning that the individual:

- Is unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services alone;
- Needs training services to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services alone; and
- Has the skills and qualifications to successfully participate in the selected program of training services.

CSRC, per WIOA, gives service priority to target populations, including those on government assistance, low-income career seekers (including older workers), dislocated workers, displaced homemakers, individuals who are basic skills deficient, veterans and their eligible spouses, regardless of the level of funds. However, when programs are statutorily required to provide priority for a group of individuals, such as the WIOA priority described above, priority is given in the following manner:

- Veterans and their eligible spouses who are recipients of public assistance, low-income, or individuals who are basic skills deficient.
- Individuals who are not veterans or their eligible spouses, who are recipients of public assistance, low-income, or individuals who are basic skills deficient.
- Veterans and their eligible spouses who are not recipients of public assistance, are not low income, or are not basic skills deficient.
- Individuals who are not veterans or their eligible spouses, who are not recipients of public assistance, are not low-income, and are not basic skills deficient.

CSRC requires that TANF funding be used first when serving career seekers in the WT program before using WIOA funds. This policy will enable CSRC to increase services to other low-income, targeted populations, including older workers.

(9) Training Services: Describe how training services are provided, including how contracts for training services are used, and how such contracts are coordinated with the use of ITAs (WIOA §134(c)(1)(A)(v)).

CSRC delivers training services, when appropriate, through ITAs, OJT, IWT, Customized Training, Apprenticeships and Internships.

Individual Training Accounts (ITA)

ITAs are linked to in-demand employment opportunities in the LWDA. CSRC will provide ITAs for qualified career seekers in need of financial assistance to obtain the education and job skills necessary for a career that will lead to self-sufficiency. ITAs are issued for specific training programs and training providers and may be used at any approved institution for payment of tuition, books and fees. ITAs are categorized into two tiers based on whether the occupational training is for an entry level position, or high-wage position, reviewed annually and updated based on available funding.

ITAs, in the form of a voucher as payment to the training institution, are issued on a semester/term, or class basis and service providers must track the total amount issued to ensure that limits are not exceeded. ITAs may be used for education, job skills training, and associated needs required for employment in one or more of the careers named on the LTOL, or to obtain specific skills certification leading to one of the occupations in demand.

On the Job Training (OJT)

OJT is paid subsidized job skill training that is provided by an employer during the initial term of employment through an OJT contract between employer, CSRC and the employee. The OJT is designed to ensure the participant acquires the employer specific job skills necessary to secure and maintain employment. The training is limited in duration as appropriate to the occupation for which the participant is being trained and is not to exceed six months.

Incumbent Worker Training (IWT)/Customized Training

IWT and Customized Training are developed through contracts with employers, employees and CSRC that provides partial reimbursement of training dollars to compensate the employer for the cost of training. The primary goal of the IWT/Customized training is to assist employees obtain or retain employment by enhancing their skills or learning new technologies, to avert layoffs, save jobs and increase wages. Employers must identify the individual(s) as in need of training in order to maintain or retain the employment. Employer reimbursement is negotiated based on the employer needs and matching contributions.

Pre-Apprenticeship

CSRC develops pre-apprenticeship opportunities to prepare career seekers for entry into a registered apprenticeship program as well as establish a pipeline of pre-apprentices who can move into apprenticeships that lead them attaining certificates and credentials and jobs that advance to journey-level employment. Participants are provided “career readiness” which includes essential skills to prepare for, find and retain a job in the specific sector industry, and courses that introduce them to the industry’s concepts. In addition, participants are taught “soft skills” to help them succeed in the workplace. Some topics included in the “soft skills” training include environmental awareness, worker rights and safety, diversity in the workplace, employee responsibility and commitments, absenteeism and action plans, and communication and conflict resolution. Participant may be enrolled in a paid, short-term internships at a participating registered apprenticeship employer. This allows the employer and participant to see if they are a match for a potential register apprenticeship opportunity.

Apprenticeship

CSRC utilizes training services for Registered Apprenticeship Programs in the following ways:

- An ITA or Training Services Contract is developed for a participant to receive registered apprenticeship training.
- An OJT contract is developed with the employer to support some or all the OJT portion of the registered apprenticeship program.
- A combination of an ITA to cover the classroom instruction along with an OJT contract to cover on-the-job portions of the registered apprenticeships.

Internship

Internship is a training service activity designed to meet the needs of individuals who have limited or no work experience in targeted industries and occupations in demand, outdated skills or no work experience related to their recent educational career field, and are in need of this service to obtain unsubsidized employment leading to self-sufficiency. Internship is provided via contract between the employer and CRSC with emphasis on matching work site opportunities with the training, interests and aptitudes of WIOA participants for targeted industries with occupations in-demand.

CSRC-paid internships are established as short-term, subsidized employment learning experiences in targeted, sector industries with occupations in demand in the LWDA with private, non-profit or public employers. Internships are not to exceed 320 hours or sixteen (16) weeks. These internships may be suitable for WIOA Adults and Dislocated Workers who have limited or no work experience in targeted sector industries and occupations in demand for the LWDA, outdated skills, or no work experience related to their recent educational career field and are in need of the Internship learning experience in order to obtain unsubsidized employment leading to self-sufficiency.

Internship is utilized by the WIOA Youth program to provide a comprehensive menu of options for enrolled youth. Occupational training services can be referral-based through partnering agencies or offered "in-house" through a variety of web-based platforms. Work based training opportunities are also available through internships which require agreements with local private and public businesses to provide youth with hands-on training in their respective field of interest for up to twelve (12) weeks. Training opportunities are regularly reviewed and aligned with local target occupations that project solid job growth so that youth can work towards their ultimate career pathway goals by developing skills gains in the process (skills gains, stackable, portable credentials, and training).

(10) Customer Choice Process: Describe processes the local board uses to ensure customer choice in the selection of training programs, regardless of how the training services are to be provided (WIOA §108(b)(19)).

CSRC staff utilizes Labor Market Information to include tools such as Help Wanted Online and Employ Florida to assist career seekers in making informed career choices. CSRC ensures that staff informs career seekers of customer choice when it comes to selecting training programs and training providers. CSRC team members work one-on-one with career seekers during the application and career planning process to inform them about training program eligibility, requirements to complete the training, length of training programs, cost of the training, and outcomes.

To ensure career seekers are informed and make appropriate choices, they are provided with the LTOL, the local ETPL, and training provider scorecards are in development for each provider, outlining outcomes such as graduation rates, employment and pay rate. Career seekers are referred to workshops, online assessment tools and are suggested to visit their training provider of choice, as well as other training providers on the list, to explore the program and ask questions about the training provider.

(11) Individual Training Accounts: Describe the process and criteria for issuing Individual Training Accounts (ITAs) (WIOA §108(b)(19)).

Career seekers determined eligible and suitable for occupational skills training are issued an ITA for training programs included in the LTOL and to an approved Eligible Training Provider. WIOA, Section 134 of the Regulations states that a program of training services may include a program of one or more classes or courses, or a structured regimen that upon successful completion leads to a certification/credential, an associate's of science degree, a baccalaureate degree, registered apprenticeship program or the skills or competencies needed for a specific job or jobs, an occupation, an occupational group, or generally, for many types of jobs or occupations, as recognized by employers and determined prior to training.

Training services may be provided if CSRC team members determine after an interview, evaluation, assessment, and career planning that the individual:

- Is unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services alone;
- Needs training services to obtain or retain employment that leads to self-sufficiency or wages comparable to or higher than wages from previous employment, through career services alone; and
- Has the skills and qualifications to successfully participate in the selected program of training services.

A. Describe any ITA limitations established by the board;

CSRC gives priority for WIOA-funded ITAs for occupations in the following industry sectors approved by the LWDB 20 Board of Directors throughout the LWDA:

- Advanced Manufacturing
- Healthcare
- Construction Trades
- Logistics and Distribution
- Hospitality
- Professional & Business Services

The thresholds for allowable investment will be categorized in the below two tiers:

Tier	Average Wage	Maximum ITA Investment
Tier 1	Up to $15.00 per hour	Up to $3,500
Tier 2	$15.01+ per hour	Up to $5,000

B. Describe any exceptions to the use of ITAs.

While an ITA is the primary method used for procuring training services under WIOA Title 1 Adult and Dislocated Worker apart from OJT, IWT, Internship, Apprenticeship and Pre-Apprenticeship, in certain circumstances, a training contract may be used to provide training services instead of an ITA. Under section 134 (c) (3) (G) (ii) of WIOA "the contract exceptions to an ITA", CSRC may utilize training contracts if at least one of the circumstances listed below applies:

- On-the-job training, which may include placing participants in a Registered Apprenticeship program, customized training, incumbent worker training or transitional jobs
- If CSRC determines that an institution of higher education or other provider of training services could provide the most appropriate training in order to facilitate the training of a cohort of multiple individuals for jobs in-demand sectors or occupations, provided that the contract does not limit consumer choice.
- If CSRC determines that providing training through a combination of ITAs and contracts is the most effective approach, this approach will be used to support placing participants in programs such as Registered Apprenticeships, Registered Pre-Apprenticeships and/or other similar types of training.

(12) Microenterprise and Entrepreneurial Training: Describe mechanisms currently in place or in consideration that provide microenterprise and entrepreneurial training. Describe mechanisms in place that support programs and co-enrollment, where appropriate, in core programs as described in WIOA section 134(a)(3)(A)(i) (WIOA §108(b)(5)).

CSRC works closely with the local Small Business Development Center's (SBDC) entrepreneurial development programs. The SBDC serves as the primary entity offering counseling and training to small business clients in the LWDA. CSRC embraces special projects and initiatives that addresses special industry needs and develops stronger ties with the business community. In partnership with the largest educational training provider, IRSC, CSRC has provided IWT, and customized training opportunities to offer employee development and training programs for local businesses. As specific needs of local employers and industries have been identified, CSRC and IRSC have worked together to best meet those needs.

CSRC will continue to implement innovative programs and strategies, through strategic partnerships, to meet the needs of all employers of the LWDA. CSRC's goal is to deliver business service strategies that better engage employers in LWDA and make the workforce system more relevant to the needs of local employers.

(13) Enhancing Apprenticeships: Describe how the LWDB enhances the use of apprenticeships to support the local economy. Describe how the LWDB works with industry representatives and local businesses to develop registered apprenticeships, in collaboration with apprenticeship training representatives from the Florida Department of Economic Opportunity and other partners, including educational partners. Describe how career seekers are made aware of apprenticeship opportunities.

CSRC serves as an apprenticeship sponsor and works with industry representatives and local businesses to develop needed apprenticeship training programs. CSRC's registered apprenticeship contains (3) occupations, Industrial Manufacturing Technician, Truss Design Technician and Distribution Logistics Technician. CSRC also supports other registered apprenticeship programs including Piper Aircraft's Aircraft Rigging & Fabrication, CVS Health's Pharmacy Technician, IRSC's Electrical and HVAC apprenticeships, Florida Training Services' Carpentry Apprenticeship and various construction trades apprenticeships sponsored by the local labor unions.

CSRC actively encourages career seekers to utilize apprenticeship programs as a career pathway to high demand, high wage occupations that are needed in the LWDA. CSRC has identified the critical need for skilled labor in the areas of construction trades and manufacturing and recognizes that apprenticeship programs are a key job-driven strategy for employers and industries. CSRC has partnered with American Lodging and Hotel Association (ALHA) and the National Restaurant Association Educational Foundation(NRAEF) to launch their hospitality sector registered apprenticeship program that offer both hotel and restaurant employees with the opportunity to advance their careers and move into higher paying management positions.

Career seekers are made aware of registered apprenticeships opportunities through one-on-one engagements with CSRC staff, media campaigns involving press releases, social media, flyers and brochures, community meetings, school and association presentations and partnerships with faith community-based organizations. Registered apprenticeship opportunities are listed on the CSRC website and social platforms and listed on the local ETPL. Additionally, all apprenticeship opportunities are entered as job orders in Employ Florida. allowing career seekers to access pertinent information about all apprenticeship opportunities. Career Planners are responsible for managing apprenticeship job orders and sourcing eligible candidates to present to the employers. All CSRC and Partner team members are educated about the career path opportunities apprenticeship programs provide. A specific referral system will be implemented for apprenticeship programs where employers and/or apprenticeship training providers can refer individuals to the CSRC Career Center system who are seeking apprenticeship to be considered for funding of an ITA and/or OJT.

(14) Other Program Initiatives: Describe services provided that include implementing initiatives such as incumbent worker training programs, on-the-job training programs, customized training programs, work-based training, industry and sector strategies, career pathway initiatives, utilization of effective business intermediaries, and other initiatives supporting the board's vision and strategic goals described in Section III WIOA §134(c).

Industry and Sector Strategies Career Pathway Initiatives

Under CareerSource Florida's sector strategy policy and their sector strategy initiatives, CSRC received multiple sector-specific grants. These grants address the lack of a skilled talent pipeline needed to meet the current and future market demands of the local manufacturing, healthcare, distribution logistics and construction trades industries.

Business Intermediaries

CSRC collaborated with the EDCSLC, area businesses and educational leaders to form a Workforce Readiness Taskforce to reassess the current skills gap in four (4) of targeted industry sector, Healthcare, Manufacturing and Construction Skilled Trades and Distribution Logistics in the LWDA.

Industry Driven Career Pathways

- CSRC hosts the State of Jobs Conference (SOJC), the industry driven half-day conference brings together 600 plus high school Juniors and Seniors to explore post-secondary training options, and career path opportunities in various industry sectors in demand. The conference features keynote speakers and sector industry leaders who engage students with career path opportunities, leadership skills, career readiness and financial aid information.
- CSRC is a partner in the Lincoln Park Common Good Career Pathways Initiative, as described earlier. The initiative, which targets residents of an under-resourced community, provides certification training in manufacturing, logistics, and healthcare; all industries that have been identified as having major skill gaps in the LWDA.
- CSRC is a partner of the Building Fort Pierce YouthBuild initiative, as described earlier.

Apprenticeship Programs

CSRC serves as an apprenticeship sponsor and works with industry representatives and local businesses to develop needed apprenticeship training programs. CSRC's registered apprenticeship contains (3) occupations, Industrial Manufacturing Technician, Truss Design Technician and Distribution Logistics Technician. CSRC also supports other registered apprenticeship programs including Piper Aircraft's Aircraft Rigging & Fabrication, CVS Health's Pharmacy Technician, IRSC's Electrical and HVAC apprenticeships, Florida Training Services' Carpentry Apprenticeship and various construction trades apprenticeships sponsored by the local labor unions. CSRC actively encourages career seekers to utilize apprenticeship programs as a career pathway to high demand, high wage occupations that are needed in the LWDA. CSRC has identified the critical need for skilled labor in the areas of construction trades and manufacturing and recognizes that apprenticeship programs are a critical job-driven strategy for employers and industries.

Other Initiatives:

- The Welfare Transition (WT) Program has the Getting Ahead curriculum to help under-resourced individuals to:
  - Take charge of their lives.
  - Complete a self-assessment of their own resources and make plans to build them.
  - Develop a series of mental models to examine their own lives and create new future
  - stories.
  - Help stabilize their lives.
  - Investigate the impact that poverty has had on themselves and their community.
  - Use this information to build resources for a better life and community.

(15) Service Provider Continuous Improvement: Describe the local board's efforts to ensure the continuous improvement of eligible providers of services, including contracted services providers and providers on the eligible training provider list, so they meet the needs of local employers, workers and career seekers (WIOA §108(b)(6)(A)).

CSRC ensures service providers achieve program quality and outcomes that meet the objectives of federal, state and local programs and of the LWDA by providing technical assistance and guidance, as needed; regularly monitoring; comparing results with LWDB 20 Board of Directors, Federal and State standards, and requiring corrective actions when necessary. Corrective actions require following up to ascertain that corrective actions are completed, and documenting progress through regular reporting to LWDB 20 staff and Board of Directors.

Service provider contracts include the required outcomes and quality standards required by the LWDB 20 Board of Directors. CSRC utilizes various team members with programmatic experience to ensure that contracted service provider programs are following federal/state/local regulations and to provide technical assistance, guidance and training as needed. Contracted service providers are monitored regularly by CSRC and CSRC's contracted, independent monitoring firm. Any issues discovered are reported to the Vice President of Operations and the service provider. CSRC requires contracted service providers who are out of compliance with any contractual agreements, the law, and/or program regulations to complete corrective action plans. These providers are required to respond in writing with a Corrective Action Plan within twenty (20) working days from the request of the LWDB 20 Board of Directors.

The progress and success of CSRC contracted service providers are reviewed through monthly performance reports and feedback from the community. The reports cover the performance and expenditures of service providers, and staff compares outcomes, success rates, cost effectiveness and the service provider's value to the community based on these performance reports, monitoring reports, community feedback and information obtained from the State's management information systems. The Vice President of Operations reviews all reports prior to review by the LWDB 20's Program & Services Committee and Youth Council and makes recommendations to the LWDB 20 Board of Directors regarding staff or service provider performance.

CSRC has an established application process and quality standards for potential training providers. Applications from potential training providers are accepted throughout the year. CSRC has an Eligible Training Provider List Policy (ETPL) approved by the LWDB 20 Board of Directors which details the approval process to become an eligible training provider for the LWDA.

CSRC has developed an Occupational Skills Training Provider Agreement for eligible training providers. The Agreement requires that all training providers submit performance information as well as cost information on an annual basis or as costs change.

A Training Provider Scorecard is a tool utilized by CSRC to provide performance information. The Score Card is reviewed by the Programs & Services Committee and the LWDB 20 Board of Directors on an annual basis. CSRC has included minimum performance levels in the Training Provider Agreement and those levels must be maintained in order to remain on the Eligible Training Provider List. These levels are as follows:

- % of participants who completed the program of study - 75%
- % of participants who completed the program and obtain employment - 85%
- % of participants who complete training and obtain unsubsidized employment and who are retained fourth quarter after exit– 85%
- % WIOA participants who complete the training and obtain an industry recognized credential or a degree – 75%

The Training Provider Score Card will be available and updated annually on the CSRC website for review by individuals interested in training opportunities. Complaints from participants or the community regarding the performance of a training provider are addressed initially by CSRC staff. CSRC contacts the training providers, via a telephone or on-site visit, to verify facts. CSRC may request a corrective action plan if the complaint is validated. If CSRC staff is unable to resolve the complaint with the training provider and the participant, the complaint is elevated to the Programs and Services Committee for resolution.

CSRC Staff can make recommendations to the Programs and Services Committee to cease training for occupations that have resulted in overtraining and/or when there is a decline in job openings. The actions of the Committee are ultimately reviewed and approved by the LWDB 20 Board of Directors.

(16) Youth Program Design: Describe the design framework for local youth programs and how the 14 program elements required in §681.460 of the WIOA regulations are made available within that framework (WIOA §129(c)(1)).

The following WIOA Youth program elements are made available to each youth during the program. These are independently driven by the participants needs. Services needed are identified in the Individual Service Strategy (ISS).

WIOA Required Youth Program Elements	Provider, or Referral Agency	Instructional Activities/Curriculum
Tutoring, academic remediation; study skills training, and instruction leading to secondary school completion, including dropout prevention strategies	CSRC / Public school partners	Computer based training/instructor facilitated, FCAT and GED Practice, GED Prep materials, Practice GED exams, and an instructional teacher-aided tool that is also used as a one-to-one instructional resource with minimal guidance. (online)
Alternative secondary school offerings	CSRC/ Public school partners	Florida Sunshine State Standards
Paid and unpaid work experiences, including internships and job shadowing	CSRC/ Community Business partners, CBO's, FBO's	Documented Work Experience activities
Occupational skills training	CSRC / Approved Training Provider Partners	Various. Based on identified occupations/career fields on the Targeted Occupations List with approved training providers
Workforce Concurrent Education	CSRC and/or community agencies	Independently driven by participant needs. Partnership with post-secondary and local training providers and employers to encourage youth to see education as part of their career pathway
Leadership development opportunities, including such activities as positive social behavior and soft skills, decision making, teamwork, etc.	CSRC in connection with various community partner agencies and employers	Employability skills, life skills curriculum that includes leadership development, health, nutrition, sexual behavior, and substance abuse prevention
Supportive Services	CSRC in connection with various partner agencies and/or employers	Independently driven by participant needs. Supportive services for educational training and employment activities such as gas cards, bus passes, uniforms, background checks and childcare.
Adult mentoring for at least 12 months	CSRC in connection with partner agencies and employers	Independently driven by participant needs. Case managed and documented.
Follow-up services no less than 12 months after exit	CSRC	Independently driven by participant needs. Contact with employer, post-secondary entities, job retention coaching, academic support, incentives, support, career and education counseling. (Continuous service until participant has completed follow-up period of 12 months).
Comprehensive guidance and counseling	CSRC and/or community agencies	Ongoing intensive case management. Community/locally based programming.
Financial Literacy	CSRC in connection with partner agencies	Independently driven by participant needs. Partnerships with local banks and financial planning partners
Entrepreneurial Skills Training	CSRC and/or community agencies	Independently driven by participant needs. Partnerships with small business development, banking and financial institutions.
Labor Market and Local Employment Information	CSRC	Independently driven by participant needs. Using local workforce system access, ongoing career pathway discussions to include LMI and local career opportunities
Post-Secondary Transition Services	CSRC and/or community agencies	Independently driven by participant needs. Partnerships with post-secondary and local training providers to support youth into higher education

With the cooperation and commitment of each participant and their family, whenever possible, staff develops an ISS and determines barriers to each participant's success. The TABE or CASAS is used to ascertain standardized Reading and Math grade levels if needed. Other work readiness and career interest assessments may also be used. The staff and participant will work together to develop a personalized ISS plan.

WIOA Youth program staff records all activities with a participant through timely and accurate case notes, applications, enrollments, goals, both planned and achieved, program outcomes and follow-ups. CSRC WIOA program staff or their designees conducts random case file reviews on a regular basis.

Case management is developed to encourage inter-departmental partnerships to maximize the utilization of resources to support the needs of the youth. WIOA Youth program staff provides referrals, as necessary, to ensure that each participant is getting the appropriate professional support as needed.

WIOA Youth program staff provide a year-round approach to case follow up. Follow-up services include re-employment assistance, education placement and assistance, career and employment mentoring and incentives for job retention and career improvements.

WIOA Youth program staff utilize resources to help participants attain and/or improve basic Workforce Readiness Skills including the Youth Employment Success Solutions (YESS™) curriculum. This curriculum provides the necessary employability skills and basic workforce knowledge needed to assist youth in gaining and maintaining employment.

WIOA Youth program staff administers support services based on individual circumstances. Support services provided are limited to career and education related needs and the addressing of temporary barriers to employment or education. Additionally, assistance may be provided to ensure program participation, as needed and documented for individual youth.

A. **Define the term "a youth who is unable to compute or solve problems, or read, write, or speak English at a level necessary to function on the job, in the individual's family, or in society."**

CSRC defines the term "a youth who is unable to compute or solve problems, or read, write, or speak English at a level necessary to function on the job, in the individual's family, or in society" as basic skills deficient.

Describe how the local board defines whether a youth is unable to demonstrate these skills sufficiently to function on the job, in their family, or in society and what assessment instruments are used to make this determination (20 C.F.R. §681.290).

Participants are considered "basic skills deficient" if their TABE test results are at a National Rating Scale (NRS) of four (4) or below.

CSRC's WIOA Youth program, also will accept ELL/ESL students under this barrier for in-school youth or out-of-school youth that were assigned to ELL/ESL programs during their last school year attended.

B. **Define "requires additional assistance."**

Describe how the local board defines the term "requires additional assistance" used in determining eligibility for WIOA-funded youth programs (20 CFR §681.300).

CSRC's WIOA Youth program defines a youth that "requires additional assistance" as meeting one or more of the following barriers:

1. Youth who have one or more biological parent incarcerated, institutionalized or sentenced by a court of law to incarceration/institutionalization for more than one year. Documentation provided by court, institution, or Department of Corrections records.
2. Youth that who have been victims of domestic violence or intimate partner violence as documented by law enforcement or domestic violence organization.
3. Youth who are documented gang members or gang affiliates as defined and documented by local law enforcement.
4. Youth who are residing in a high poverty area as defined by census tract records showing area of youth's residence as having a poverty rate of 30% or greater.
5. Youth who are over age 21 and have no work history or have poor work history, as defined by the lack of employment for more than 180 consecutive days documented by employer records, pay records, or Suntax.

In accordance with WIOA guidelines, youth applying for the WIOA youth program as a "youth requiring additional assistance" must also meet income guidelines for WIOA enrollment. CSRC utilizes federal/state/local agency documentation sources as validation of the "youth requiring additional assistance" barrier whenever possible but may accept an applicant statement/self-attestation in extenuating circumstances. In order to further operationalize this policy, it is set forth as a standard local operating procedure.

END OF LOCAL PLAN

CareerSource RESEARCH COAST
A proud partner of the AmericanJobCenter network

MEMORANDUM OF UNDERSTANDING
COMPREHENSIVE ONE-STOP CAREER CENTER for
LOCAL WORKFORCE DEVELOPMENT AREA 20 BETWEEN
THE WORKFORCE CONSORTIUM OF THE TREASURE COAST
CAREER SOURCE RESEARCH COAST
AND REQUIRED PARTNERS

I. BACKGROUND: The creation of the One-Stop Center was a cornerstone of the Workforce Investment Act of 1998 (WIA). The vision for the One-Stop Center system reflects the long-standing efforts of dedicated workforce professionals to align a wide range of publicly or privately funded education, employment, and training programs, while also providing high quality customer service to all job seekers, workers, and employers. Since then, the Workforce Innovation and Opportunity Act of 2014 (WIOA) builds on the significance and benefits of the *Comprehensive One-Stop Career Center* network, related best practices, and incorporates important tools and technological advances that have opened up new methods of service delivery in the workforce development system. Under WIOA, the new *Comprehensive One-Stop Career Center* System includes a network of required partners whose staff strive to:

1. Provide job seekers with the skills and credentials necessary to secure and advance in employment with wages that sustain themselves and their families.
2. Provide access and opportunities to job seekers, including individuals with barriers to employment, such as individuals with disabilities, English language learners, and those who have low levels of literacy, to prepare for, obtain, retain, and advance in high-quality jobs and high-demand careers.
3. Enable businesses and employers to easily identify and hire skilled workers and access other human resource assistance, including education and training for their current workforce, which may include assistance with pre-screening applicants, writing job descriptions, offering rooms for interviewing, consultation services, and more.
4. Participate in rigorous evaluations that support continuous improvement of the *Comprehensive One-Stop Career Center* by identifying which strategies work better for different populations.
5. Ensure that high-quality integrated data inform decisions made by policy makers, employers and partners.

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

II. PURPOSE: The purpose of this Memorandum of Understanding (MOU) is to describe the cooperative workforce training, employment and economic development efforts of the Local Workforce Development Area (LWDA 20) and the required Partners with oversight by the Treasure Coast Workforce Consortium. This MOU details the actions to be taken by each of the Partners to assure the coordination of their efforts, and prevent duplication, in accordance with state-issued requirements in order to establish and maintain an effective and successful *Comprehensive One-Stop Career Center.* WIOA reinforces the required partnerships and strategies necessary for the Workforce Development Board of the Treasure Coast dba Career Source Research Coast (CSRC) and the required partners to provide all job seekers and workers with the high-quality career, training, and supportive services they need to obtain and maintain good jobs through the *Comprehensive One-Stop Career Center.* Such strategies help businesses find skilled workers and access other human resource assistance, including education and training, to meet their current workforce needs. The *Comprehensive One-Stop Career Center* will result in:

1. Expanded workforce services for individuals at all levels of skill and experience.
2. Access to multiple employment and training resources.
3. Integrated and expert intake process for all customers entering the *Comprehensive One-Stop Career Center.*
4. Integrated and aligned business services strategies among *Comprehensive One-Stop Career Center* partners.
5. Expert advice from multiple sources, and levels of staff expertise across all partners.
6. Relevance to labor market conditions leading to Return on Investment (ROI).
7. Expanded community and industry outreach, increasing customer participation and enrollments, supporting businesses, common intake / assessments, joint outreach, defined referral processes.
8. Strengthened partnerships.
9. Efficient use of accessible information technology.

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

III. Required Partners to this Memorandum of Understanding:

WIOA Adult, Dislocated and Youth Programs	Glenda Harden	Senior Vice President of Operations	1-866-482-4473	gharden@careersourcerc.com
Migrant and Seasonal Farmworkers	Glenda Harden	Senior Vice President of Operations	1-866-482-4473	gharden@careersourcerc.com
Wagner-Peyser Act	Glenda Harden	Senior Vice President of Operations	1-866-482-4473	gharden@careersourcerc.com
Jobs for Veterans	Glenda Harden	Senior Vice President of Operations	1-866-482-4473	gharden@careersourcerc.com
Trade Adjustment Assistance	Glenda Harden	Senior Vice President of Operations	1-866-482-4473	gharden@careersourcerc.com
Temporary Assistance for Needy Families / TANF	Glenda Harden	Senior Vice President of Operations	1-866-482-4473	gharden@careersourcerc.com
Supplemental Nutritional Assistance Program / SNAP	Glenda Harden	Senior Vice President of Operations	1-866-482-4473	gharden@careersourcerc.com
Re-Employment Assistance Program / Unemployment	Glenda Harden	Senior Vice President of Operations	1-866-482-4473	gharden@careersourcerc.com
AARP Foundation / Senior Community Service	Paula Trautman	Project Director	772-336-3330	ptrautman@aarp.org

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

Employment Program			772-224-5248	
Florida Dept. of Education Division of Blind Services	Bobbie Howard-Davis	District Administrator	561-681-2548	bobbie.howard-davis@dbs.fldoe.org
Florida Division of Vocational Rehabilitation	Wayne Olson	Area Director	(407)893-5657	wayne.olson@vr.fldoe.org
Community Services Block Grant / St. Lucie County Community Services	Diana Weslowski Renee Scott	Director	772-462-1777	weslowskid@stlucieco.org scottr@stlucieco.org
Title II Adult Education and Literacy / Indian River State College	Kelly Amatucci	Assistant Dean / IRSC School of Education	772-462-7674	kamatucc@irsc.edu
Post-Secondary Career & Technical Education / Indian River State College	Donna Rivett	Dean / Industrial Education / IRSC	772-462-4722	drivett@irsc.edu
Youth Build Program / Indian River State College / IRSC	Dr. Pamela Welmon	Vice President of Applied Science and Technology / Project Director	772-462-7235	pwelmon@irsc.edu

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

IV. Goals:

1. Eliminate the unwarranted duplication of services, reduce administrative costs, and enhance the participation and performance of customers served through the *Comprehensive One-Stop Career Center.*

2. Establish guidelines for creating and maintaining a cooperative working relationship to facilitate joint planning and evaluation of services, and to develop more efficient management of limited financial and human resources.

3. Build a workforce development system that upgrades Florida's workforce skills and enhances the economic development of the region.

V. GENERAL PROVISION OF SERVICES: Partners to this MOU agree jointly to coordinate and perform activities and services described herein within the scope of legislative requirements governing the parties' respective programs, services, and agencies. Refer to Addendums / Attachments A through N. All Partners agree to:

1. Provide services in the LWDA 20 *Comprehensive One-Stop Career Center*, as appropriate and needed by the community served. Each agency will be responsible for providing those services in which they specialize or for which they receive funding and to the extent determined by the program's authorizing statute.

2. Participate in the *Comprehensive One-Stop Career Center* and actively contribute to the quality of the local workforce development system.

3. Participate in the development of the *Comprehensive One-Stop Career Center "*Infrastructure Funding Agreement" (IFA) that describes how operating costs of the system will be funded, and abide by those plans.

4. Comply with *Comprehensive One-Stop Career Center* policies and procedures regarding customer confidentiality, data security, and referrals between partners.

5. Participate in and provide training and cross-training, as deemed appropriate, to ensure that the *Comprehensive One-Stop Career Center* staff are familiar with all programs contained in the *Comprehensive One-Stop Career Center* in order to integrate services, reduce duplication, and improve overall service delivery.

6. Participate in the utilization of an integrated case management, client tracking system, and referral procedures between parties as appropriate.

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

7. Actively participate in joint case management activities within confidentiality guidelines.
8. Assign staff, and contribute furnishings, telecommunications equipment, and other materials resources necessary for staff housed in the *Comprehensive One Stop Career Center* to support the overall operations of the *Comprehensive One-Stop Career Center*.
9. Maintain responsibility for staff assigned to the *Comprehensive One-Stop Career Center*, ensuring that the staff adheres to policies and procedures, as developed by the federal government, the State of Florida, CSRC, and other *Comprehensive One Stop Career Center* Partners.
10. Contribute a fair share of funds proportionate to the use of space and resources or the delivery of services to individuals attributable to the partners' programs to the infrastructure costs of the *Comprehensive One-Stop Career Center*. The Infrastructure Funding Agreement (IFA) in included as a part of this MOU.
11. For staff housed in the *Comprehensive One-Stop Career Center*, connect with and use a regional computer network system, housed at *Career Source Research Coast*, for all *Comprehensive One- Stop Career Center* communications, case management, and client tracking. Partners may maintain and use existing agency-specific internal systems independent of the *Comprehensive One-Stop Career Center*, but must use the *Comprehensive One-Stop Career Center* network for documenting services provided through the center.
12. Assist with the development of a coordinated employer services marketing package.
13. Share data, information, and resources within confidentiality guidelines that will enhance services to customers and the *Comprehensive One-Stop Career Center*.
14. Develop and maintain additional participating partners germane to the needs of the communities served.
15. Maintain flexible operating hours in the *Comprehensive One-Stop Career Center* to include Monday through Friday, 8:00 A.M. to 5:00 P.M., at a minimum, plus evening and weekend hours as appropriate for the communities served.
16. Review annually, and revise the terms of this MOU and the IFA, as necessary and agreed upon.
17. Assume liability for its actions and the actions of its agents. Hold harmless, defend and indemnify all other Partners to this MOU from any and all claims for damages, including

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

costs and attorney's fees, resulting in whole or part, from the Partner or its agents' activities under this MOU.

VI. ASSURANCES:

1. The Partners to this MOU shall not exclude from participation, discriminate against, or deny employment services or benefits to any person, including trainees, in the administration of, or in connection with any programs administered by the Partners on the grounds of race, color, sex, religion, mental or physical disability, age, political affiliation, belief, national origin, marital status, application for Workers' Compensation benefits, juvenile justice record, sexual orientation or perceived sexual orientation, or association with any person with, or perceived to have one or more of the above named characteristics. Each *Comprehensive One-Stop Career Center* customer shall have recourse through the appropriate complaint procedure.

2. Each Partner to this MOU assures that it will follow the Americans with Disabilities Act (ADA) when operating in the *Comprehensive One-Stop Career Center*.

3. The Partners to this MOU will assure that it will follow its affirmative action plan to assure nondiscrimination, written personal policies, and grievance procedures for complaints and grievances from applicants, subcontractors, employers, employees, and other interested persons, all in accordance with applicable statutes and regulations.

4. It is expressly understood and agreed by all Partners to this MOU that employees receiving compensation for work performed under this agreement shall in no way be deemed employees of CSRC.

5. No funds utilized in conducting activities under this MOU shall be used to promote religious or non-religious activities, or used for lobbying activities, or political activities.

6. Each Partner to this agreement assures that it is an equal opportunity employer and is aware of and shall comply with Equal Employment Opportunity Commission practices or mandated by state and federal statutes and regulations.

7. Each Partner to this agreement assures that it will follow a Drug-Free Workplace policy that is in compliance with the Drug-Free Workplace Act of 1988.

8. Each Partner to this agreement ensures that the needs of individuals, to include those with barriers to employment and those with disabilities, are addressed by providing access to services, including access to technology and materials that are available through the *Comprehensive One- Stop Career Center.*

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

VII. METHODS OF REFERRAL: Partners to this MOU will work together to develop referral procedures that assure quality and convenient services for customers.

VIII. TERM OF MEMORANDUM OF UNDERSTANDING AS REQUIRED BY WIOA LEGISLATION: This MOU / IFA commences on January 1, 2018 and expires June 30, 2020 unless terminated earlier upon thirty (30) days written notice to all Partners via certified U.S. Mail. This MOU must be reviewed and renewed not less than once every three (3) years.

IX. DISPUTE RESOLUTION: Partners to the *Comprehensive One-Stop Career Center* will function by consensus. When consensus cannot be reached and the functioning of the LWDA 20 *Comprehensive One-Stop Career Center* is impaired, those who are parties to the dispute will adhere to the following dispute resolution procedure:

1. All parties to the dispute will meet with the *Comprehensive One-Stop Career Center* Manager and/or the Director of Operations.
2. If the *Comprehensive One-Stop Career Center* Operations Manager or Director of Operations is unable to resolve the dispute to the satisfaction of members who are parties to the dispute, the complaint shall be referred to the One-Stop Operator.
3. If the One-Stop Operator is unable to resolve the dispute, the complaint shall be submitted in writing to the Senior Vice President of Operations of CSRC within 15 working days of the initial dispute.
4. The Senior Vice President of Operations will evaluate the merit of the dispute, consult with the *Comprehensive One-Stop Career Center* Operations Manager, the Director of Operations, the One-Stop Operator and the aggrieved party or parties, and may attempt to resolve the dispute through mediation.
5. If any party to the dispute is not satisfied with the decision of CSRC Administration, the dispute will be referred to the CSRC Executive Committee of the Board of Directors for final action. This entity will make a decision within thirty (30) working days of the dispute.

X. AMENDMENTS AND MODIFICATIONS: This MOU may be amended or modified with review and consent of all Partners. Amendments and modifications must be issued in writing to all Partners. All Partners must be given a minimum of 30 days to comment prior to the inclusion of any amendment or modification. Oral amendments or modifications shall have no effect. If any provision of this MOU is held to be invalid, the remainder of the

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

Memorandum shall not be affected. This MOU will be reviewed and renewed not less than once every three (3) years.

XI. GOVERNANCE: The management of the *Comprehensive One-Stop Career Center* is the responsibility of CSRC pursuant to WIOA. CSRC, in partnership with the Consortium, shall conduct oversight with respect to the *Comprehensive One-Stop Career Center*. CSRC will promote and support the total integration of workforce development services of all *Comprehensive One-Stop Career Center* Partners, promote customer choice and satisfaction for internal and external customers of the *Comprehensive One-Stop Career Center*, remove external barriers which impede progress and performance, approve annual and long-range performance standards and goals for the *Comprehensive One-Stop Career Center*, develop an IFA for the *Comprehensive One-Stop Career Center,* establish an evaluation system for measuring customer satisfaction and performance and communicate with the community regarding the *Comprehensive One-Stop Career Center.* Through the *Comprehensive One-Stop Career Center*, the "One-Stop Operator":

1. Facilitates integrated partnerships that seamlessly incorporate services for the common customers served by program partners of the *Comprehensive One-Stop Career Center.*

2. Develops and implements operational policies that reflect an integrated system of performance, communication, and case management, and uses technology to achieve integration and expanded service offerings.

3. Organizes and integrates the *Comprehensive One-Stop Career Center* by function when permitted by a program's authorizing statute and, as appropriate, through coordinating staff communication, capacity building, and training efforts.

4. Provides superior service to partners and businesses in an integrated, regionally focused framework of service delivery, consistent with the requirements of each of the partner programs.

5. Ensures that *Comprehensive One-Stop Career Center* and Partner staff are cross-trained, as appropriate, to increase staff capacity, expertise, and efficiency. This allows staff from differing programs to understand other partner programs' services, and share their own expertise related to the needs of specific populations so that all staff can better serve all customers.

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST
d/b/a CAREER SOURCE RESEARCH COAST
WORKFORCE INNOVATION AND OPPORTUNITY ACT
WIOA / ADULT
MEMORANDUM OF UNDERSTANDING ADDENDUM

I. CAREER SOURCE RESEARCH COAST

CareerSource Research Coast is a private, non-profit corporation with a Board of Directors consisting of private business, educational and economic development representatives, community-based organizations, state agencies, elected officials and a full-time professional staff. Our mission is to promote a bright economic future through the coordination of workforce development activities and services in the three-county area.

II. WORKFORCE INNOVATION AND OPPORTUNITY ACT / (WIOA) - ADULT

Services provided to adults 18 years of age and older that meet eligibility requirements:

- Occupational Skills Training
- Individual Training Accounts for classroom training
- On-The-Job Training
- Customized Training
- Employed Worker Training
- Supportive Services
- Comprehensive Career Planning and Counseling
- Follow-up Services

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST
d/b/a CAREER SOURCE RESEARCH COAST
WORKFORCE INNOVATION AND OPPORTUNITY ACT
DISLOCATED WORKER
MEMORANDUM OF UNDERSTANDING ADDENDUM

I. CAREER SOURCE RESEARCH COAST

CareerSource Research Coast is a private, non-profit corporation with a Board of Directors consisting of private business, educational and economic development representatives, community-based organizations, state agencies, elected officials and a full-time professional staff. Our mission is to promote a bright economic future through the coordination of workforce development activities and services in the three-county area.

II. WORKFORCE INNOVATION AND OPPORTUNITY ACT / DISLOCATED WORKER

Services provided to adults 18 years of age and older that meet eligibility requirements:

- Occupational Skills Training
- Individual Training Accounts for classroom training
- On-The-Job Training
- Customized Training
- Employed Worker Training
- Supportive Services
- Comprehensive Career Planning and Counseling
- Follow-up Services

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST
d/b/a CAREER SOURCE RESEARCH COAST
WORKFORCE INNOVATION AND OPPORTUNITY ACT / WIOA - YOUTH
MEMORANDUM OF UNDERSTANDING ADDENDUM

I. CAREER SOURCE RESEARCH COAST

CareerSource Research Coast is a private, non-profit corporation with a Board of Directors consisting of private business, educational and economic development representatives, community-based organizations, state agencies, elected officials and a full-time professional staff. Our mission is to promote a bright economic future through the coordination of workforce development activities and services in the three-county area.

II. WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA) - YOUTH

Services provided to youth ages 16 – 24 with a focus on Out-of-School youth:

- Paid Work Experiences
- Occupational Skills Training
- Career Exploration
- Job Readiness Skill Training
- Supportive Services
- Youth Employment Success Solutions
- Industry Certifications
- Assistance with High School Diploma or GED
- Tutoring
- Mentoring
- Comprehensive Guidance and Counseling
- Follow-up Services

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST
d/b/a CAREER SOURCE RESEARCH COAST
MIGRANT SEASONAL FARMWORKER
MEMORANDUM OF UNDERSTANDING ADDENDUM

I. CAREER SOURCE RESEARCH COAST

CareerSource Research Coast is a private, non-profit corporation with a Board of Directors consisting of private business, educational and economic development representatives, community-based organizations, state agencies, elected officials and a full-time professional staff. Our mission is to promote a bright economic future through the coordination of workforce development activities and services in the three-county area.

II. MIGRANT SEASONAL FARMWORKER (MSFW)

Services Provided to Migrant and Seasonal Farmworkers:

- Employment Assistance
- Job Placement
- Job Referrals
- Job Order Assistance
- Supportive Service Referrals
- Labor Market Information
- Referrals to Training
- Recruitment and Retention Services
- Workshops
- Skills / Interests Assessments
- Career Exploration
- Basic Education Proficiency Testing
- Job Fairs and Recruitment Events

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST
d/b/a CAREER SOURCE RESEARCH COAST
WAGNER – PEYSER ACT
MEMORANDUM OF UNDERSTANDING ADDENDUM

I. CAREER SOURCE RESEARCH COAST

CareerSource Research Coast is a private, non-profit corporation with a Board of Directors consisting of private business, educational and economic development representatives, community-based organizations, state agencies, elected officials and a full-time professional staff. Our mission is to promote a bright economic future through the coordination of workforce development activities and services in the three-county area.

II. WAGNER – PEYSER ACT

Services available to all employers and career seekers with no eligibility requirements:

- Employment Assistance
- Job Placement
- Job Referrals
- Job Order Assistance
- Referrals to Training
- Recruitment and Retention Services
- Supportive Service Referrals
- Labor Market Information
- Workshops
- Skills / Interests Assessments
- Career Exploration
- Basic Education Proficiency Testing
- Job Fairs and Recruitment Events
- Assistance with filing Re-Employment Assistance (RA) Benefit Claims

---

PRIORITY RE-EMPLOYMENT PLANNING (PREP)

New reemployment assistance claimants who are most likely to exhaust their benefits before returning to work are identified and referred by the Department of Economic Opportunity (DEO) early during their RA claim in order to assist them with getting back to work faster. These RA claimants are referred to other programs and services as appropriate, but they are required to participate in the following reemployment services:

- Career Center Orientation
- Initial assessment to gauge their educational and employment needs

---

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST
d/b/a CAREER SOURCE RESEARCH COAST
JOBS FOR VETERANS PROGRAM
MEMORANDUM OF UNDERSTANDING ADDENDUM

I. CAREER SOURCE RESEARCH COAST

CareerSource Research Coast is a private, non-profit corporation with a Board of Directors consisting of private business, educational and economic development representatives, community-based organizations, state agencies, elected officials and a full-time professional staff. Our mission is to promote a bright economic future through the coordination of workforce development activities and services in the three-county area.

II. JOBS FOR VETERANS PROGRAM

Services Available to Veterans with Significant Barriers to Employment (SBE):

- Employment Counseling
- Case Management
- Employment Plan Development
- Job Referrals
- Referrals to Training
- Job Placement
- Supportive Service Referrals
- Labor Market Information
- Workshops
- Skills / Interests Assessments
- Career Exploration
- Basic Education Proficiency Testing

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST
d/b/a CAREER SOURCE RESEARCH COAST
TRADE ADJUSTMENT ASSISTANCE / TAA
MEMORANDUM OF UNDERSTANDING ADDENDUM

I. CAREER SOURCE RESEARCH COAST

CareerSource Research Coast is a private, non-profit corporation with a Board of Directors consisting of private business, educational and economic development representatives, community-based organizations, state agencies, elected officials and a full-time professional staff. Our mission is to promote a bright economic future through the coordination of workforce development activities and services in the three-county area.

II. TRADE ADJUSTMENT ASSISTANCE (TAA)

Services provided to workers who have been laid off or whose jobs have been threatened because of foreign competition:

- Training
- Re-Employment Services
- Job Search Allowances
- Relocation Allowances
- Trade Adjustment Allowances / Income Support
- Wage Subsidy for Older Workers
- Health Coverage Tax Credit Benefits

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST
d/b/a CAREER SOURCE RESEARCH COAST
WELFARE TRANSITION PROGRAM
MEMORANDUM OF UNDERSTANDING ADDENDUM

I. CAREER SOURCE RESEARCH COAST

CareerSource Research Coast is a private, non-profit corporation with a Board of Directors consisting of private business, educational and economic development representatives, community-based organizations, state agencies, elected officials and a full-time professional staff. Our mission is to promote a bright economic future through the coordination of workforce development activities and services in the three-county area.

II. WELFARE TRANSITION PROGRAM

Individuals receiving Temporary Assistance for Needy Families (TANF) benefits referred by the Department of Children and Families (DCF) are provided the following services:

- Employment Counseling
- Case Management
- Individual Responsibility Plan Development
- Job Placement
- Job Referrals
- Supportive Services
- Child Care
- Transportation Assistance (Gas Cards)
- Labor Market Information
- Workshops
- Skills / Interests Assessments
- Career Exploration
- Basic Education Proficiency Testing
- Occupational Skills Training
- Funding for ESOL/GED Classes
- Transitional Services After Employment
- Referral to Upfront Diversion and Relocation Assistance Benefits Provided by DCF

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST d/b/a CAREER SOURCE RESEARCH COAST SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM MEMORANDUM OF UNDERSTANDING ADDENDUM

I. CAREER SOURCE RESEARCH COAST

CareerSource Research Coast is a private, non-profit corporation with a Board of Directors consisting of private business, educational and economic development representatives, community-based organizations, state agencies, elected officials and a full-time professional staff. Our mission is to promote a bright economic future through the coordination of workforce development activities and services in the three-county area.

II. SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM (SNAP)

Individuals receiving SNAP benefits referred by the Department of Children and Families (DCF) are provided the following services:

- Employment Counseling
- Case Management
- Employment Plan Development
- Job Placement
- Job Referrals
- Labor Market Information
- Workshops
- Skills / Interests Assessments
- Career Exploration
- Basic Education Proficiency Testing
- Occupational Skills Training
- Referral to Upfront Diversion and Relocation Assistance Benefits Provided by DCF

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST d/b/a CAREER SOURCE RESEARCH COAST AND AARP FOUNDATION SENIOR COMMUNITY SERVICE EMPLOYMENT PROGRAM MEMORANDUM OF UNDERSTANDING ADDENDUM

I. AARP FOUNDATION SENIOR COMMUNITY SERVICE EMPLOYMENT PROGRAM

AARP Foundation, the charitable affiliate of AARP, is working to win back opportunity for struggling Americans age 50+ by being a force for change on the most serious issues they face today: housing, hunger, income and isolation. By coordinating response to these issues on all four fronts at once, and supporting them with vigorous legal advocacy, the Foundation serves the unique needs of those 50+ while working with local organizations nationwide to reach more people and make resources go further. AARP Foundation administers the Senior Community Service Employment Program and is located at 7410 S US Highway 1, Port St. Lucie, Florida.

II.RESPONSIBILITIES AND RESOURCES:

AARP Foundation SCSEP agrees to the following responsibilities and resources:

- Provision of a minimum of one (1) individual participating at the Comprehensive One-Stop Career Center. While AARP Foundation SCSEP will make every effort to dedicate additional participants to the Comprehensive One-Stop Career Center or other Career Source Research Coast sites, this is contingent upon availability of suitable participants, funding vs. enrollment levels, and priority of new enrollments.
- Provision of employment and training opportunities for eligible individuals age 55 and older
- Intake and AARP Foundation SCSEP eligibility assessment and determination
- Provision of funding for classroom training.
- Provision of work experience, on-the-job training and placement services for SCSEP eligible individuals
- Referrals to other agencies/resources as appropriate
- Posting of open positions and provision of new hire information for each position

These resources are in-kind contributions and will be utilized to offset shared cost obligations for the Comprehensive One-Stop Career Center.

Career Source Research Coast agrees to provide the following resources:

- Allocation of a 7 ft. X 9 ft. work space for co-location of one AARP Foundation staff member. Total usage area is 63 square feet.
- Office furniture
- Telephone for local access
- Computer, monitor and access to the network printer, copier, fax and scanner
- Use of common areas such as break room, lobby area, etc. Advanced reservations of the conference rooms are required.
- Ongoing/routine computer IT support
- Receptionist services
- Administrative support

These in-kind contributions are in lieu of monetary compensation for one office to be used by one local AARP Foundation Senior Community Service Employment Program staff member / participant and covers usual and customary “overhead” expenses.

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST
d/b/a CAREER SOURCE RESEARCH COAST
AND
FLORIDA DIVISION OF BLIND SERVICES
MEMORANDUM OF UNDERSTANDING ADDENDUM

I. THE FLORIDA DIVISION OF BLIND SERVICES

The Florida Division of Blind Services (DBS) offers a variety of supports to Floridians whose visual impairments significantly affect their ability to participate in daily activities. The programs provide valuable training to assist individuals who are blind, as well as those with usable but diminished vision, if their vision is poor in both eyes even with glasses or contact lenses. Blindness and diminished vision (often called low vision) can lead to developmental delays for babies, poor performance in school, reduced earnings in the workforce, and difficulty for seniors seeking maximum independence. DBS is part of the Florida Department of Education and has 16 offices throughout the State. In partnership with community rehabilitation providers, it provides services through a combination of state, federal, and community funding. All services are developed for each individual based on their particular needs. The mission of the Florida Division of Blind Services is: "to ensure blind and visually impaired Floridians have the tools, support and opportunity to achieve success"

VOCATIONAL REHABILITATION PROGRAM:

This program provides services when visual impairment is a barrier to employment. A plan is developed for each individual to provide the education, training, equipment, and skills needed for success. Services are provided by DBS Vocational Rehabilitation Specialists, local community rehabilitation providers, DBS's Rehabilitation Center, and when additional education is needed, through sponsorship of training at vocational schools and colleges.

II. RESPONSIBILITIES AND RESOURCES:

- Information, advocacy and referral to agencies with appropriate services
- Vocational evaluation and career counseling
- Assistive Technology Training, assessment and training in the use of software designed for persons with visual impairments so they can effectively use computers
- Communication Skills Training, includes teaching how to use writing guides, read and write Braille and keyboarding skills
- Use of low-vision devices that may maximize the use of existing vision
- Rehabilitation Technology Services, determining equipment needed for training or employment
- Orientation and Mobility Training, methods of safely explore new environments and utilize public transportation
- Rehabilitation Teaching, training in self-care skills such as cooking, cleaning, measuring, and clothing identification
- Employment related skill included, job readiness, job coaching, job development, and job placement
- Medical and Psychological Assessment

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST d/b/a CAREER SOURCE RESEARCH COAST AND THE DIVISION OF VOCATIONAL REHABILITATION MEMORANDUM OF UNDERSTANDING ADDENDUM

I. THE FLORIDA DIVISION OF VOCATIONAL REHABILITATION

The Florida Division of Vocational Rehabilitation (VR) is a federal-state program that helps people who have physical or mental disabilities get or keep a job. VR is committed to helping people with disabilities find meaningful careers.
Our Mission is "to help people with disabilities find and maintain employment and enhance their independence." Our Vision is "to become the first place people with disabilities turn when seeking employment and a top resource for employers in need of qualified employees."

In addition to the general customer employment program, VR has additional specific programs designed to help eligible people with disabilities become employed.

II. PROGRAMS AND SERVICES OFFERED:

- Job Placement
- Job Coaching
- On-The-Job Training
- Supported Employment
- Discovery
- Customized Employment
- Assistive Technology and Devices
- Training and Education After High School
- Job-Site Assessment and Accommodations
- Career Counseling and Guidance
- Vocational Evaluation and Planning
- Medical and Psychological Assessment
- Time-Limited Medical and/or Psychological Treatment

III. ADDITIONAL TRANSITION SERVICES:

- Employability Training Courses
- Community Based Work Experiences
- Vocational Evaluation and Planning
- Self-Advocacy
- Guidance and Counseling
- Discovery
- Interest and Aptitude testing

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST
d/b/a CAREER SOURCE RESEARCH COAST
AND
ST. LUCIE COUNTY COMMUNITY SERVICES
MEMORANDUM OF UNDERSTANDING ADDENDUM

I. ST. LUCIE COUNTY COMMUNITY SERVICES

St. Lucie County Community Services Department's mission is to provide assistance to St. Lucie County residents to improve quality of life through information, resources and services. This department is comprised of four divisions: The Human Services Division, using grant funds and community resources, staff work with residents providing them with various services needed to reach independence. The Housing Division administers multiple state and federal grants to provide for affordable housing and depending on eligibility criteria, grants allow for a variety of services, including repair of health and safety issues for homeowners, down payment assistance for home purchase, infrastructure projects to prevent future hurricane damage, purchase and rehabilitation of foreclosed property and others. The Veteran Services Division provides U.S. Armed Forces veterans and their dependents assistance in obtaining earned Veteran benefits. Veterans are counseled on the rules and regulations governing benefits and providing follow-up action as needed. The Transportation Services Division, in partnership with "Treasure Coast Connector", provides public transit within our community. Seven fixed routes and door-to-door para-transportation for eligible individuals help to following services:

II. ST. LUCIE COUNTY COMMUNITY SERVICES WILL PROVIDE:

- Career Source Research Coast (CSRC) clients visiting the "Comprehensive One-Stop Career Center" will have computer access via "Skype", eight (8) hours per month, to the St. Lucie County Community Services Department.

- Clients will have the ability to apply online for services including but not limited to: employment support services, identification cards, driver's license, transportation, and GED testing fees to 10 clients @ approximately $100 per client for eligible applicants when funding is available not to exceed $1,000.

III. ADDITIONAL PARTICIPATION IN THE "COMPREHENSIVE ONE-STOP CAREER CENTER"

- Staff will familiarize themselves with the basic eligibility and participation requirements, as well as with the available services and benefits offered, for each of the Partner's programs.

- Community Services staff will provide bi-annual training to CSRC staff on programs and eligibility requirements pertaining to the "Community Services Block Grant".

- A liaison or contact between the agencies will be designated for the purpose of technical or program assistance.

- Develop materials summarizing program requirements and make them available for Partners and customers.

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST
d/b/a CAREER SOURCE RESEARCH COAST
AND
INDIAN RIVER STATE COLLEGE / ADULT EDUCATION-FAMILY LITERACY
MEMORANDUM OF UNDERSTANDING ADDENDUM

I. ADULT EDUCATION - FAMILY LITERACY / IRSC

Job seekers who haven't graduated from high school have the opportunity to study to take the General Education Development (GED exam which is a set of assessments that when passed, the test-taker has met high school-level academic skills. Indian River State College will offer Adult Basic Education (ABE) classes as well as GED Preparation classes in Reading, Math, Language, Social Studies, and Science to prepare students for the official GED exam.

II. IRSC / ADULT EDUCATION WILL PROVIDE THE FOLLOWING:

- Adult Basic Education (ABE) and GED Prep courses to eligible customers with a focus on obtaining the necessary skills to transition into a post-secondary program and/or the workforce
- Outreach, intake, orientation, assessment and counseling for students
- Provide assistive technology and devices to enable individuals with various disabilities to benefit from the GED Program
- Provide services and tutoring as appropriate through face-to-face and online options

III. PARTICIPATION IN THE COMPREHENSIVE ONE-STOP CAREER CENTER

- Be familiar with the array of services provided through the "Comprehensive One-Stop Career Center" and the partnering agencies
- Participate in activities associated with assessing related organizational performance and developing and carrying out improvement plans as appropriate
- Utilize technology whenever possible to enhance service delivery

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST
d/b/a CAREER SOURCE RESEARCH COAST
AND
INDIAN RIVER STATE COLLEGE / CAREER & TECHNICAL EDUCATION
MEMORANDUM OF UNDERSTANDING ADDENDUM

I. POST-SECONDARY CAREER AND TECHNICAL EDUCATION / IRSC

Career and Technical Education (CTE) programs prepare students for employment focusing directly on job skills. These programs include hands-on experience and opportunities to develop increasingly sophisticated and marketable as one progresses through the program. CTE programs specialize in skilled trades, applied sciences, modern technologies and career preparation. Indian River State College advisors can provide personal attention and assist students in developing their educational and career plans.

II. CAREER AND TECHNICAL EDUCATION WILL PROVIDE THE FOLLOWING:

- Post-Secondary Career and Technical Education (CTE) Programs to eligible customers, including:
  - Office Administration
  - Administrative Specialist
  - Legal Administrative Specialist
  - Medical Administrative Specialist
- Other Degree and Certificate programs leading to industry-recognized certifications
- Outreach, intake, orientation, assessment and counseling
- Provide assistive technology and devices to enable individuals with various disabilities to benefit from available post-secondary education
- Provide services and tutoring as appropriate through face-to-face and online options

III. PARTICIPATION IN THE COMPREHENSIVE ONE-STOP CAREER CENTER

- Be familiar with the array of services provided through the “Comprehensive One-Stop Career Center” and the partnering agencies
- Participate in activities associated with assessing related organizational performance and developing and carrying out improvement plans as appropriate
- Utilize technology whenever possible to enhance service delivery

WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST d/b/a CAREER SOURCE RESEARCH COAST AND INDIAN RIVER STATE COLLEGE / YOUTH BUILD PROGRAM MEMORANDUM OF UNDERSTANDING ADDENDUM

I. *YOUTHBUILD* PROGRAM

YouthBuild is a community-based alternative education program that provides job training and educational opportunities for at-risk youth ages 16-24. Youth learn construction skills while constructing or rehabilitating affordable housing for low-income or homeless families in their own neighborhoods. Youth split their time between the construction site and the classroom, where they earn their high school diploma or equivalency degree, learn to be community leaders, and prepare for college and other post-secondary training opportunities. *YouthBuild* includes significant support systems, such as mentoring, follow-up education, employment, and personal counseling services, and participation in community service and civic engagement.

II. *YOUTHBUILD* WILL PROVIDE THE FOLLOWING:

Program participants who meet eligibility requirements are offered the following services and opportunities:

- Earn industry-recognized construction credentials
  - NCCER Level I and II
  - OSHA 10 hour Safety
- Work on a construction site earning $10 per hour for up to 4 months
- Transportation to work site
- Opportunity to earn up to $500 in incentives
- Free GED classes
- Career Counseling
- Job placement and career assistance
- Training in leadership skills and civic engagement
- Mentoring

I. PARTIES

This Infrastructure Funding Agreement (IFA) is made pursuant to the Workforce Innovation and Opportunity Act 2014 (WIOA) and is entered into by CareerSource Research Coast (CSRC) and the Required Partners.

II. PURPOSE

The Workforce Innovation and Opportunity Act of 2014 is an affirmation of the work that has been done in Florida to build the workforce development system. The cornerstone of the Act is its one-stop customer service delivery system. The one-stop system assures coordination between the activities authorized in and linked to the Act.

The purpose of this IFA is to describe the infrastructure cost responsibilities of the Partners to provide for the maintenance of an effective and successful Comprehensive One-Stop Career Center. This agreement is intended to coordinate resources and to prevent duplication and ensure the effective and efficient delivery of workforce services in the Local Workforce Development Area 20, which includes Martin, St. Lucie and Indian River counties.

The Partners to this document agree to coordinate and perform the responsibilities described herein within the scope of legislative requirements governing the partners' respective programs, services, and agencies.

REST OF PAGE INTENTIONALLY LEFT BLANK

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

III. INFRASTRUCTURE COST BUDGET/LWDA 20 COMPREHENSIVE ONE-STOP CAREER CENTER

LWDA 20
Comprehensive One Stop Career Center
Infrastructure Operating Costs Budget

	Expenses	584 Univ. #300
6175	Custodial Services	19,422.02
6266	Equipment < $5000	33.78
6275	Insurance	17,019.92
6282	Service Charges and Other Fees	0.00
6287	Records Storage & Misc	982.16
6300	Postage/Shipping	1,400.52
6325	Printing/Duplicating	0.00
6330	Program Supplies	17.48
6474	Rent-Equipment	27,957.44
6475	Rentals-Facilities	255,031.11
6480	Repairs, Maintenance & Fuel	19,987.02
6500	Security	14,313.25
6550	Software & License Renewals	6,424.51
6600	Supplies	6,346.43
6650	Telephone and Internet	19,141.31
6825	Utilities	13,650.85
Total		**401,727.81**

Cost Category	GL	Cost Item	
Infrastructure Costs	Custodial Services	Custodial Services	3,269.70
Infrastructure Costs	Equpment < $5K	Equipment Costs	5.69
Infrastructure Costs	Insurance	Insurance	2,865.31
Infrastructure Costs	Records and Storage	Shredding	165.35
Infrastructure Costs	Postage	Postage	235.78
Infrastructure Costs	Program Supplies	Books	2.94
Infrastructure Costs	Rent - Equipment	equipment leases	4,706.64
Infrastructure Costs	Rent - Facilites	Facility rent	42,934.53
Infrastructure Costs	Repairs and Maintenance	Electrical repairs	110.19
Infrastructure Costs	Repairs and Maintenance	Air Conditioning repairs	556.73
Infrastructure Costs	Repairs and Maintenance	Plumbing repairs	31.31
Infrastructure Costs	Repairs and Maintenance	Storm preparation	33.67
Infrastructure Costs	Repairs and Maintenance	Pest Control	107.24
Infrastructure Costs	Repairs and Maintenance	Copier Maintenance	2,525.68
Infrastructure Costs	Security	Security	404.84
Shared Services	Software and Licenses	Computer software	1,081.57
Infrastructure Costs	Supplies	Nameplates	90.36
Infrastructure Costs	Supplies	Maintenace Supplies	304.47
Infrastructure Costs	Supplies	Office Supplies	673.59
Infrastructure Costs	Telephone and Internet	Meetings	76.60
Infrastructure Costs	Telephone and Internet	Internet	1,664.54
Infrastructure Costs	Telephone and Internet	Telephone / Voicemail	1,447.89
Infrastructure Costs	Telephone and Internet	State of FL Dept of Mgmt	25.85
Infrastructure Costs	Telephone and Internet	Fax Service	7.56
Infrastructure Costs	Utilities	FPL	2,298.12
Career Services	Salaries and Benefits	Resource Room Staff (2)	100,514.00
Career Services	Salaries and Benefits	Front Desk Staff (2)	66,096.00
Shared Services	Salaries and Benefits	Center Manager	71,699.00
Shared Services	Salaries and Benefits	IT Support	58,493.21
Total			**362,428.36**

Infrastructure Costs	64,544.58
Shared Services	131,273.78
Career Services	166,610.00
Total	**362,428.36**

Remaining areas	**83.16%**
Resource Room and CA	**16.84%**
Custodial Services	19,422.02
Equipment Costs	33.78
Insurance	17,019.92
Shredding	982.16
Postage	1,400.52
Books	17.48
equipment leases	27,957.44
Facility rent	255,031.11
Electrical repairs	654.55
Air Conditioning repairs	3,306.96
Plumbing repairs	186.00
Storm preparation	200.00
Pest Control	637.00
Copier Maintenance	15,002.51
Security	2,404.76
Computer software	6,424.51
Nameplates	536.76
Maintenace Supplies	1,808.57
Office Supplies	4,001.10
Meetings	455.00
Internet	9,887.34
Telephone / Voicemail	8,600.49
State of FL Dept of Mgmt	153.56
Fax Service	44.92
FPL	13,650.85
Total	**389,819.32**

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

IV. COST ALLOCATION METHODOLOGY

CSRC has allocated costs based on FTEs present at the Comprehensive One-Stop Career Center. For partners who choose to utilize electronic virtual access, costs are based on square footage and actual costs utilized. This allocation methodology was done in an effort to comply with the requirement of Partners' contributions be in proportion to the Partner's use of the Comprehensive One-Stop Career Center and relative benefits received.

V. PARTNER CONTRIBUTION AMOUNTS

CareerSource Research Coast St. Lucie Career Center
Comprehensive One Stop Partner Contribution Budget
Full-Time Equivalent (FTE) One Stop Costs

Partner Program	# of Staff	Weekly Staff Hours	# of FTE's	% of FTEs	Annual FTE Cost	Infastructure Costs	Shared Services	Career Services
WIOA Adult DLW Youth	6	240	6	26.64%	96,519.07	17,192.79	34,967.49	44,380.02
Welfare Transition	3	60	1.5	6.66%	24,129.77	4,298.20	8,741.87	11,095.01
SNAP	3	60	1.5	6.66%	24,129.77	4,298.20	8,741.87	11,095.01
TAA	1	10	0.25	1.11%	4,021.63	716.37	1,456.98	1,849.17
Wagner Peyser	6	270	6.75	29.97%	108,583.95	19,341.88	39,338.42	49,927.52
UC	0.25	10	0.25	1.11%	4,021.63	716.37	1,456.98	1,849.17
Veterans Program	3	120	3	13.32%	48,259.53	8,596.39	17,483.74	22,190.01
Migrant Seasonal Farmworker	1	40	1	4.44%	16,086.51	2,865.46	5,827.91	7,396.67
AARP Foundation/Senior Community Service Employment Program	1	20	0.5	2.22%	8,043.26	1,432.73	2,913.96	3,698.34
Florida Division of Blind Services	1	1	0.025	0.11%	402.16	71.64	145.70	184.92
Florida Division of Vocational Rehabilitation	4	16	0.4	1.78%	6,434.60	1,146.19	2,331.17	2,958.67
Dept. of Housing and Urban Development/Housing Authority of City of Ft. Pierce	0	0	0	0.00%	0.00	0.00	0.00	0.00
Community Services Block Grant/St Lucie County Community Services	Skype	0	0	0.00%	0.00	0.00	0.00	0.00
Second Change Act Re-Entry Program	0	0	0	0.00%	0.00	0.00	0.00	0.00
Title II Adult Education and Literacy/Indian River State College	1	20	0.5	2.22%	8,043.26	1,432.73	2,913.96	3,698.34
Post Secondary Career & Technical Educational/Indian River State College	2	24	0.6	2.66%	9,651.91	1,719.28	3,496.75	4,438.00
Youth Build Program	1	10	0.25	1.11%	4,021.63	716.37	1,456.98	1,849.17
Total	**33.25**	**901**	**22.525**		**362,348.67**	**64,544.58**	**131,273.78**	**166,610.00**

Total Budgeted Comprehensive One Stop Shared Costs	362,428.36
Partner Fixed Shared Comprehensive One Stop Cost Allocation	79.69
Adjusted Budgeted Comprehensive One Stop Shared Costs	**362,348.67**

CareerSource Research Coast
Budgeted Comprehensive One Stop Costs for Partners Virtual Access

Office space for 1 Skype Station	66			SF	
Total Comprehensive One Stop	11,880			SF	
Phone lines	120			users	
Computer access	82			users	

Comprehensive One Stop Budgeted Applicable Costs	Budgeted Monthly Cost	Cost Allocation Method	Budgeted Monthly Cost for 1 Skype
Janitorial	1,722.60	SF	9.57
Rent	19,710.90	SF	109.51
Pest Control	59.00	SF	0.33
Repairs and Maintenance	597.32	SF	3.32
Security	189.13	SF	1.05
FPL	1,137.00	users	6.32
Software maintenance	84.87	users	1.04
Comcast	216.78	users	2.64
ATT Internet	479.21	users	5.84
Level 4 Telephone	512.65	users	4.27
Total Budgeted Monthly Allocated Cost			**143.88**
# months in program year			12.00
Total Yearly Budgeted			**1,726.60**
Hourly Budgeted Cost			**0.83**
Community Services Block Grant/St Lucie County Community Services		96 hours annually	79.69

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

VI. COST RECONCILIATION AND ALLOCATION BASE UPDATE

Partners agree that a quarterly reconciliation of budgeted and actual costs and update of the allocation bases will be completed in accordance with the following process:

a. Partners will provide CSRC with the following information no later than five (5) days after the end of the first quarter as applicable to January 1, 2018:
   - First quarter cost information and documentation of the actual costs
   - Staffing information: Number of personnel and their hours served at the Comprehensive One-Stop Career Center each month during the quarter
   - Actual customer participation numbers for each month during the quarter

b. Upon receipt of the above information, CSRC will:
   - Compare budgeted costs to actual costs
   - Update the allocation bases as applicable
   - Apply the updated allocation bases as described in the Cost Allocation Methodology Section above to determine the actual costs allocable to each partner

c. CSRC will prepare an updated budget document showing cost adjustments and will prepare an invoice for each Partner with the actual costs allocable to each Partner for the quarterly period.

d. CSRC will submit the invoices to the Partners and send a copy of the updated budget to all Parties no later than thirty (30) days after the end of the quarter. The Partners understand that the timeliness of CSRC's preparation and submission of invoices and adjusted budget is contingent upon the timeliness of each Partner in providing the necessary cost information.

e. Upon receipt of the invoice and adjusted budget, each Partner will review both documents and will submit payment to CSRC no later than ten (10) days following the receipt. Payment of the invoice signifies agreement with the costs in the adjusted budget.

f. Partners will communicate any disputes with costs to the invoice or the adjusted budget to CSRC in writing. CSRC will review the disputed cost items and respond accordingly to the Partner within ten (10) days of receipt of notice of the disputed costs. When necessary, CSRC will revise the invoice and the adjusted budget upon resolution of the dispute.

VII. STEPS UTILIZED TO REACH CONSENSUS

The Partners and CSRC conferred regarding the involvement of each partner at the Comprehensive One-Stop Career Center. The appropriate allocation bases were discussed and those bases were included in this IFA were agreed upon as the most appropriate. CSRC proposed the initial Partner Contribution Amounts as described above and the Partners concurred with their proposal and agreed to the term included in the Cost Reconciliation and Allocation Base update section above.

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

VIII. DISPUTE AND IMPASSE RESOLUTION

Partners will actively participate in local IFA negotiations in a good faith effort to reach agreement. Any disputes shall first be attempted to be resolved informally. Should informal resolution efforts fail, then the following Dispute Resolution process must be followed:

1. Should informal resolution effort fail, the dispute resolution process must be formally initiated by the petitioner seeking resolution. The petitioner must send formal notification to CSRC Chairperson or designee and all Partners to the MOU regarding the conflict within ten (10) business days.

2. The CSRC Chairperson (or designee) shall place the dispute on the agenda of the CSRC Executive Committee's monthly meeting. The Executive Committee shall attempt to mediate and resolve the dispute. Disputes shall be resolved by a 2/3 majority consent of the Executive Committee members present.

3. The decision of the Executive Committee shall be final and binding unless such a decision is in contradiction of applicable State and Federal laws or regulations governing the Partner agencies.

4. The Executive Committee must provide a written response and date summary of the proposed resolution to all Partners to the MOU/IFA.

5. The CSRC Chairperson (or designee) will contact the petitioner and the appropriate partners to verify that all are in agreement with the proposed resolution.

If Partners in the local area have employed the dispute resolution process and have failed to reach consensus on an issue pertaining to the IFA, then an impasse is declared and the State Funding Mechanism (SFM) is triggered and the IFA will be appealed through the process established by the Governor for this purpose.

IX. MODIFICATION PROCESS

This IFA may be amended or modified with review and consent of all parties. Amendments and modifications must be issued in writing to all parties. All parties must be given a minimum of thirty (30) days to comment prior to the inclusion of any amendment or modification. Oral amendments or modifications shall have no effect.

X. EFFECTIVE PERIOD

This Infrastructure Funding Agreement commences on January 1, 2018, as required by Workforce Innovation and Opportunity Act legislation, and expires June 30, 2020.

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

CareerSource RESEARCH COAST

INFRASTRUCTURE FUNDING AGREEMENT
COMPREHENSIVE ONE-STOP CAREER CENTER
LOCAL WORKFORCE DEVELOPMENT AREA (LWDA) 20

MEMORANDUM OF UNDERSTANDING (MOU) AND INFRASTRUCTURE FUNDING AGREEMENT (IFA)
AUTHORITY AND SIGNATURE FORM

Once the MOU and IFA is agreed upon, this form should be signed, dated and is required for each signatory official of the required partners.

By signing my name below, I, Frannie Hutchinson, certify that I have read the above information.

My signature certifies my understanding of the terms outlined herein and agreement with:

☒ The MOU
☒ The Infrastructure Funding Agreement (IFA)

By signing this document, I also certify that I have the legal authority to bind my agency (outlined below) to the terms of:

☒ The MOU
☒ The Infrastructure Funding Agreement (IFA)

I understand that this MOU may be executed in counterparts, each being considered an original, and that this MOU expires either:

a) In three years,
b) Upon amendment, modification, or termination, or
c) On June 30, 2020, whichever occurs earlier.

Signature: Frannie Hutchinson Date: 12/19/17

Printed Name and Title: Frannie Hutchinson, Local Chief Elected Official

Agency Name: Treasure Coast Workforce Consortium

Agency Contact Information: 772-462-1451

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

CareerSource RESEARCH COAST

INFRASTRUCTURE FUNDING AGREEMENT
COMPREHENSIVE ONE-STOP CAREER CENTER
LOCAL WORKFORCE DEVELOPMENT AREA (LWDA) 20

MEMORANDUM OF UNDERSTANDING (MOU) AND INFRASTRUCTURE FUNDING AGREEMENT (IFA)
AUTHORITY AND SIGNATURE FORM

Once the MOU and IFA is agreed upon, this form should be signed, dated and is required for each signatory official of the required partners.

By signing my name below, I, Robert Cenk, certify that I have read the above information.

My signature certifies my understanding of the terms outlined herein and agreement with:

☒ The MOU
☒ The Infrastructure Funding Agreement (IFA)

By signing this document, I also certify that I have the legal authority to bind my agency (outlined below) to the terms of:

☒ The MOU
☒ The Infrastructure Funding Agreement (IFA)

I understand that this MOU may be executed in counterparts, each being considered an original, and that this MOU expires either:

a) In three years,
b) Upon amendment, modification, or termination, or
c) On June 30, 2020, whichever occurs earlier.

Signature: _____ Date: 12/15/17

Printed Name and Title: Robert Cenk, Board Chair

Agency Name: CareerSource Research Coast

Agency Contact Information: Brian Bauer

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

CareerSource RESEARCH COAST

INFRASTRUCTURE FUNDING AGREEMENT
COMPREHENSIVE ONE-STOP CAREER CENTER
LOCAL WORKFORCE DEVELOPMENT AREA (LWDA) 20

MEMORANDUM OF UNDERSTANDING (MOU) AND INFRASTRUCTURE FUNDING AGREEMENT (IFA)
AUTHORITY AND SIGNATURE FORM

Once the MOU and IFA is agreed upon, this form should be signed, dated and is required for each signatory official of the required partners.

By signing my name below, I, Brian Bauer, certify that I have read the above information.

My signature certifies my understanding of the terms outlined herein and agreement with:

☒ The MOU
☒ The Infrastructure Funding Agreement (IFA)

By signing this document, I also certify that I have the legal authority to bind my agency (outlined below) to the terms of:

☒ The MOU
☒ The Infrastructure Funding Agreement (IFA)

I understand that this MOU may be executed in counterparts, each being considered an original, and that this MOU expires either:

a) In three years,
b) Upon amendment, modification, or termination, or
c) On June 30, 2020, whichever occurs earlier.

Signature: _____ Date: 12/15/2017

Printed Name and Title: Brian Bauer, President/CEO

Agency Name: CareerSource Research Coast

Agency Contact Information: Jenn DuBey

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

CareerSource RESEARCH COAST

INFRASTRUCTURE FUNDING AGREEMENT
COMPREHENSIVE ONE-STOP CAREER CENTER
LOCAL WORKFORCE DEVELOPMENT AREA (LWDA) 20

MEMORANDUM OF UNDERSTANDING (MOU) AND IFRASTRUCTURE FUNDING AGREEMENT (IFA)
AUTHORITY AND SIGNATURE FORM

Once the MOU and IFA is agreed upon, this form should be signed, dated and is required for each signatory official (see list beginning on page two (2) of the MOU).

By signing my name below, I, PAULA B. TRAUTMAN, certify that I have read the above information.

My signature certifies my understanding of the terms outlined herein and agreement with:

☑ The MOU
☑ The Infrastructure Funding Agreement (IFA)

By signing this document, I also certify that I have the legal authority to bind my agency (outlined below) to the terms of:

☑ The MOU
☑ The Infrastructure Funding Agreement (IFA)

I understand that this MOU may be executed in counterparts, each being considered an original, and that this MOU expires either:

a) In three years,
b) Upon amendment, modification, or termination, or
c) On June 30, 2020, whichever occurs earlier.

Signature: Paula B. Trautman Date: 1/3/2018

Printed Name and Title: PAULA B. TRAUTMAN, PROJECT DIRECTOR

Agency Name: AARP FOUNDATION SCSEP

Agency Contact Information: 772-336-3330 ptrautman@aarp.org

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

CareerSource RESEARCH COAST

INFRASTRUCTURE FUNDING AGREEMENT
COMPREHENSIVE ONE-STOP CAREER CENTER LOCAL
WORKFORCE DEVELOPMENT AREA (LWDA) 20

MEMORANDUM OF UNDERSTANDING (MOU) AND INFRASTRUCTURE FUNDING AGREEMENT (IFA)
AUTHORITY AND SIGNATURE FORM

Once the MOU and IFA is agreed upon, this form should be signed, dated and is required for each signatory official of the required partners.

By signing my name below, I, Allison Flanagan, certify that I have read the above information.

My signature certifies my understanding of the terms outlined herein and agreement with:

[X] The MOU
[X] The Infrastructure Funding Agreement (IFA)

By signing this document, I also certify that I have the legal authority to bind my agency (outlined below) to the terms of:

[X] The MOU
[X] The Infrastructure Funding Agreement (IFA)

I understand that this MOU may be executed in counterparts, each being considered an original, and that this MOU expires either:

a) In three years,
b) Upon amendment, modification, or termination, or
c) On June 30, 2020, whichever occurs earlier.

Signature: _____ Date: 10/22/18

Printed Name and Title: Allison Flanagan, Director

Agency Name: Department of Education, Division of Vocational Rehabilitation

Agency Contact Information: Amanda Ulmer, Contract Manager, (850) 245-3372

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

CareerSource RESEARCH COAST

INFRASTRUCTURE FUNDING AGREEMENT
COMPREHENSIVE ONE-STOP CAREER CENTER LOCAL
WORKFORCE DEVELOPMENT AREA (LWDA) 20

MEMORANDUM OF UNDERSTANDING (MOU) AND INFRASTRUCTURE FUNDING AGREEMENT (IFA)
AUTHORITY AND SIGNATURE FORM

Once the MOU and IFA is agreed upon, this form should be signed, dated and is required for each signatory official of the required partners.

By signing my name below, I, Robert L. Doyle, III, certify that I have read the above information.

My signature certifies my understanding of the terms outlined herein and agreement with:

☑ The MOU
☑ The Infrastructure Funding Agreement (IFA)

By signing this document, I also certify that I have the legal authority to bind my agency (outlined below) to the terms of:

☑ The MOU
☑ The Infrastructure Funding Agreement (IFA)

I understand that this MOU may be executed in counterparts, each being considered an original, and that this MOU expires either:

a) In three years,
b) Upon amendment, modification, or termination, or
c) On June 30, 2020, whichever occurs earlier.

Signature: _____ Date: 11/6/18

Printed Name and Title: Robert L Doyle, III. – Division Director

Agency Name: Florida Department of Education Division of Blind Services

Agency Contact Information: Phone: 850-245-0331 E-mail: Robert.Doyle@dbs.fldoe.org

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

INFRASTRUCTURE FUNDING AGREEMENT
COMPREHENSIVE ONE-STOP CAREER CENTER
LOCAL WORKFORCE DEVELOPMENT AREA (LWDA) 20

MEMORANDUM OF UNDERSTANDING (MOU) AND INFRASTRUCTURE FUNDING AGREEMENT (IFA)
AUTHORITY AND SIGNATURE FORM

Once the MOU and IFA is agreed upon, this form should be signed, dated and is required for each signatory official of the required partners.

By signing my name below, I, Howard N. Tipton, certify that I have read the above information.

My signature certifies my understanding of the terms outlined herein and agreement with:

☑ The MOU
☐ The Infrastructure Funding Agreement (IFA)

By signing this document, I also certify that I have the legal authority to bind my agency (outlined below) to the terms of:

☑ The MOU
☐ The Infrastructure Funding Agreement (IFA)

I understand that this MOU may be executed in counterparts, each being considered an original, and that this MOU expires either:

a) In three years,
b) Upon amendment, modification, or termination, or
c) On June 30, 2020, whichever occurs earlier.

Signature: Jeff Bremer, Deputy County Administrator Date: 12/21/17

Printed Name and Title: for: Howard N. Tipton, County Administrator

Agency Name: St. Lucie County

Agency Contact Information: 772-462-1453

APPROVED AS TO FORM
AND CORRECTNESS

COUNTY ATTORNEY

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

CareerSource RESEARCH COAST

INFRASTRUCTURE FUNDING AGREEMENT
COMPREHENSIVE ONE-STOP CAREER CENTER
LOCAL WORKFORCE DEVELOPMENT AREA (LWDA) 20

MEMORANDUM OF UNDERSTANDING (MOU) AND IFRASTRUCTURE FUNDING AGREEMENT (IFA)
AUTHORITY AND SIGNATURE FORM

Once the MOU and IFA is agreed upon, this form should be signed, dated and is required for each signatory official (see list beginning on page two (2) of the MOU).

By signing my name below, I, Edwin R. Massey, Ph.D., certify that I have read the above information.

My signature certifies my understanding of the terms outlined herein and agreement with:

☒ The MOU
☒ The Infrastructure Funding Agreement (IFA)

By signing this document, I also certify that I have the legal authority to bind my agency (outlined below) to the terms of:

☒ The MOU
☒ The Infrastructure Funding Agreement (IFA)

I understand that this MOU may be executed in counterparts, each being considered an original, and that this MOU expires either:

a) In three years,
b) Upon amendment, modification, or termination, or
c) On June 30, 2020, whichever occurs earlier.

Signature: Edwin R Massey Date: 1/9/18

Printed Name and Title: Dr. Edwin R. Massey, President

Agency Name: Indian River State College

Agency Contact Information: Donna Rivett, drivett@irsc.edu

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

3120160012410 RECORDED IN THE RECORDS OF JEFFREY R. SMITH, CLERK OF CIRCUIT COURT INDIAN RIVER CO FL
BK: 2916 PG: 1253, 3/3/2016 4:25 PM

INSTR # 2558368 OR BK 2834 PG 2764 RECD 02/11/2016 04:16:09 PM
(7 Pgs)
CAROLYN TIMMANN MARTIN COUNTY CLERK
DEED DOC $0.00, MTG DOC $0.00, INTANGIBLE $0.00

INTERLOCAL AGREEMENT AMONG INDIAN RIVER, MARTIN, AND ST. LUCIE COUNTIES ESTABLISHING THE TREASURE COAST WORKFORCE CONSORTIUM AND THE WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST

THIS INTERLOCAL AGREEMENT, is made and entered into pursuant to the authority of Section 163.01, Florida Statutes, by and between Indian River County, Martin County and St. Lucie County, each a political subdivision of the State of Florida.

WITNESSETH:

WHEREAS, Public Law 113-128, enacted by the Congress of the United States effective July 22, 2014, which act is known as the "Workforce Innovation and Opportunity Act" (hereinafter called the "WIOA"), the purpose of which is to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy; and

WHEREAS, the WIOA replaces the Workforce Investment Act of 1998 and retains and amends the Adult Education and Family Literacy Act, the Wagner-Peyser Act, and the Rehabilitation Act of 1973; and

WHEREAS, the WIOA makes state and local boards more agile and well-positioned to meet local and regional employers' workforce needs; and

WHEREAS, the WIOA maintains a Governor's ability to identify regions within his or her state by aligning local areas into regions for coordinated planning and service delivery strategies and further provides that a consortium of units of general local government may constitute such a workforce planning area; and

WHEREAS, WIOA promotes alignment of workforce development programs with regional economic development strategies to meet the needs of local and regional employers; and

WHEREAS, the Board of County Commissioners of each of the parties to this Agreement desires that its county be included in a regional workforce development system for its citizens to benefit from the WIOA; and

WHEREAS, the WIOA requires local Workforce Development Boards (WDB) to coordinate and align workforce programs to provide coordinated, complementary, and consistent services to job seekers and employers; and

JOSEPH E. SMITH, CLERK OF THE CIRCUIT COURT
SAINT LUCIE COUNTY
FILE # 4163688 02/25/2016 at 03:01 PM
OR BOOK 3840 PAGE 1519 - 1525 Doc Type: AGR
RECORDING: $61.00

WHEREAS, it is the responsibility of the Board of County Commissioners of each county in the region to appoint members to the WDB in accordance with the WIOA and an agreement entered into by the Board of County Commissioners of each county; and

WHEREAS, it is the responsibility of the WDB, in accordance with an agreement with the Board of County Commissioners of each county in the region, to determine procedures and select an entity to develop a workforce development strategic plan, and select a grant recipient and entity to administer the plan; and

WHEREAS, the plan must be approved and submitted jointly by the WDB and the Board of County Commissioners of each county in the region.

NOW, THEREFORE, the parties hereto agree as follows:

1. Repeal of Existing Interlocal Agreements

Any and all prior existing interlocal agreements establishing the Treasure Coast Workforce Consortium and the Workforce Development Board of the Treasure Coast between the parties and Okeechobee County are hereby repealed upon the effective date of this Agreement.

2. Establishment of Treasure Coast Workforce Consortium

There is hereby established a multijurisdictional arrangement (hereinafter called the "Treasure Coast Workforce Consortium") among all the parties hereto for the express purpose of collectively carrying out the individual responsibilities of each party to this Agreement under the WIOA. The Treasure Coast Workforce Consortium shall consist of three (3) members. The Chairman of the Board of County Commissioners of each county shall serve as his/her County's representative on the Treasure Coast Workforce Consortium; however, provided that any such Chairman of a Board of County Commissioners may designate another member of his/her County Commission to attend meetings of the Treasure Coast Workforce Consortium on his/her behalf, and any such designated member of a County Commission shall have full voting rights and privileges.

3. Identification of Parties to this Agreement

Each of the parties to this Agreement is a county of the State of Florida, and as such is a general purpose political subdivision which has the power to levy taxes and spend funds, as well as general corporate and police powers. The governing body of each of the parties to this Agreement is its Board of County Commissioners and each party to this Agreement is identified as follows:

Name	Address
Board of County Commissioners Indian River County, Florida	1801 27th Street Vero Beach, FL 32960

Board of County Commissioners Martin County, Florida	2401 S.E. Monterey Road Stuart, FL 34996
Board of County Commissioners St. Lucie County, Florida	2300 Virginia Avenue Fort Pierce, FL 34982

4. Geographical Area to be Served by this Agreement

The geographical areas which will be served by this Agreement are the entire geographical areas of each of the three (3) member counties, which geographical areas are legally described in Chapter 7, Florida Statutes, and for purposes of this Agreement, shall be known as the Treasure Coast.

5. Size of Population to be Served

The population of the three county area to be served by this Agreement is 571,821 based upon the population projections for 2014 prepared by the Florida Department of Economic Opportunity, Bureau of Labor Market Statistics.

6. Agreement Not Prohibited by Law

This Agreement is not prevented by State or local law from taking effect in the entire geographical area which it intends to serve.

7. Responsibilities of Treasure Coast Workforce Consortium

The parties to this Agreement hereby authorize the Treasure Coast Workforce Consortium:

(1) to appoint the members of the Workforce Development Board of the Treasure Coast, in accordance with Section 107 of Title I of the WIOA and Section 9 of this Agreement, which shall serve the functions described in Section 107 of Title I of the WIOA; and

(2) to enter into an agreement or agreements with the Workforce Development Board of the Treasure Coast, herein named WIOA grant recipient and administrative entity for the development of the WIOA plan as described in Section 108 of Title I of the WIOA; and

(3) to review and approve all WIOA plans prepared under Section 108 of Title I of the WIOA and jointly submit, along with the Workforce Development Board of the Treasure Coast, said plans to the Governor; and

(4) to perform any other appropriate duties necessary for the accomplishment of and consistent with the purposes of this Agreement and the WIOA.

8. Quorum and Voting

At all meetings of the Treasure Coast Workforce Consortium, the presence in person of a majority of the whole Treasure Coast Workforce Consortium shall be necessary and sufficient to constitute a

quorum for the transaction of business. At all meetings of the Treasure Coast Workforce Consortium at which a quorum is present, all matters shall be decided by the vote of a majority of the members of the Treasure Coast Workforce Consortium.

9. Establishment, Composition, and Appointment of the Workforce Development Board

There is hereby established a Workforce Development Board, which shall be constituted in accordance with the requirements of Section 107 of Title I of the WIOA and this Section 9 of this Agreement (hereinafter called the "Workforce Development Board of the Treasure Coast"). The initial number of members of the Workforce Development Board of the Treasure Coast shall be twenty-one (21). Thereafter, the number of members of the Workforce Development Board shall be determined by the Workforce Development Board.

Members shall be appointed for fixed and staggered terms and may serve until their successors are appointed. After the initial staggered terms, terms of Workforce Development Board members shall be three (3) years. Any vacancy in the membership of the Workforce Development Board shall be filled in the same manner as the original appointment. Members may be reappointed for successive terms if the sponsoring organization agrees. Any member of the Workforce Development Board may be removed for cause in accordance with procedures established by the Workforce Development Board.

A majority of the Workforce Development Board shall be representatives of the private sector, who shall be owners of businesses, chief executives or chief operating officers of businesses, and other business executives or employers with optimum policy-making or hiring authority or who represent businesses with employment opportunities that reflect the employment opportunities of the local area.

Private sector nomination, and the individuals selected by the Treasure Coast Workforce Consortium from such nominations, shall reasonably represent the industrial and demographic composition of the business community. The Chairman of the Workforce Development Board shall be selected from among members of the Board who are representatives of the private sector.

The private sector representatives on the Workforce Development Board shall be selected by the Treasure Coast Workforce Consortium from individuals nominated by general-purpose business organizations, such as chambers of commerce, economic development agencies, business councils, and business trade organizations, as follows:

(1) All nominations to the Workforce Development Board must be the CEO, or manager or equivalent of their organization whether private or public.

(2) The education representatives on the Workforce Development Board shall be selected by the Treasure Coast Workforce Consortium from individuals nominated by regional or local educational agencies, institutions or organizations representing such local educational entities.

(3) The labor representatives on the Workforce Development Board shall be selected by the Treasure Coast Workforce Consortium from individuals nominated by local labor organizations.

(4) The rehabilitation agency representatives on the Workforce Development Board shall be selected by the Treasure Coast Workforce Consortium from the individuals nominated by local rehabilitation agencies.

(5) The community-based organization representatives on the Workforce Development Board shall be selected by the Treasure Coast Workforce Consortium from the individuals nominated by local community-based organizations.

(6) The economic development agency representatives on the Workforce Development Board shall be selected by the Treasure Coast Workforce Consortium from the individuals nominated by local economic development agencies.

(7) The one-stop representatives on the Workforce Development Board shall be selected by the Treasure Coast Workforce Consortium from individuals representing one-stop partners.

(8) Other individuals or representatives of other entities may be included as the Workforce Development Board may determine to be appropriate and are so appointed by the Treasure Coast Workforce Consortium.

10. Workforce Development Area Designation.

Pursuant to the designation by the Governor, the three (3) counties constituting the Treasure Coast Workforce Consortium shall be the Treasure Coast Workforce Development Region, previously a substate service delivery area under the Workforce Innovation Act, as provided for in Section 107 of Title I of the WIOA for the geographical area covered by this Agreement.

11. No Local Funds Required of Counties

No funds will be mandated from the treasuries of any of the parties to this Agreement for implementation of the WIOA, it being the intent hereof that all funding of the WIOA shall be accomplished entirely by grants pursuant to the WIOA and any other available State or Federal grants.

12. Duration of Agreement

This Agreement shall have the duration equal to the period that the Treasure Coast Workforce Development region designation remains in effect for the geographical area covered by this Agreement. Any party to this Agreement may withdraw from this Agreement by passing a resolution to such effect and providing thirty (30) days notice to the other parties to this Agreement. However, the validity, force, and effect of this Agreement shall not be affected by the withdrawal of one (1) or more parties to this Agreement.

13. Effective Date

This Agreement shall be effective when executed by the parties hereto and when a copy of this Agreement has been filed with the Clerks of the Circuit Courts of the respective counties.

IN WITNESS WHEREOF, the undersigned parties have executed this Agreement.

DULY EXECUTED by INDIAN RIVER COUNTY this 19th day of January 2016.

BOARD OF COUNTY COMMISSIONERS - INDIAN RIVER COUNTY, FLORIDA

Leona Allen, D.C.
Jeffrey R. Smith, Clerk of the Circuit Court
And Comptroller

Bob Solari
Bob Solari, Chairman

Approved as to form and legal sufficiency:

William K. DeBraal, Deputy County Attorney

DULY EXECUTED by MARTIN COUNTY this 9th day of February, 2016.

BOARD OF COUNTY COMMISSIONERS - MARTIN COUNTY, FLORIDA

Carolyn Timmann, Clerk of the Circuit Court
and Comptroller

Anne Scott, Chair

Approved as to form and legal sufficiency:

Michael D. Durham, County Attorney

BK: 2916 PG: 1259

DULY EXECUTED by ST. LUCIE COUNTY this 26 day of January, 2016

BOARD OF COUNTY COMMISSIONERS - ST. LUCIE COUNTY, FLORIDA

Deputy Clerk of the Circuit Court

Kim Johnson, Chairman

Approved as to form and legal sufficiency:

County Attorney

T:\LEG\legal\wpfiles\evl\ADM\Treasure Coast Workforce Consortium Interlocal Agreement (11-10-15).doc

CareerSource RESEARCH COAST

careersourcerc.com

REQUEST FOR SELECTION AS THE ONE-STOP OPERATOR

Background: The Workforce Development Board of the Treasure Coast, d/b/a CareerSource Research Coast (CSRC), has operated as the direct services provider of workforce services since January 1, 2009 for the Local Workforce Development Area 20 (LWDA 20) serving Martin, St. Lucie and Indian River Counties. In the Direct Services Model, CSRC has reduced costs, improved operations and improved the image and knowledge of the local career center system in the communities served. As the direct services provider, CSRC has met and/or exceeded the State's Individual Training Account (ITA) Expenditure Requirement each year since enactment. Most importantly, CSRC, for the past six (6) years has met and exceeded Federal/State Workforce Common Measures/Primary Indicators of Performance.

Prior to Program Year 2017/2018, CSRC also fulfilled the role of the One-Stop Operator. Upon the release of CareerSource Florida (CSFL) Administrative Policy # 097, which outlined the requirements for Local Workforce Development Boards (LWDBs) to follow in competitively procuring and selecting One-Stop Operators under the Workforce Innovation and Opportunity Act (WIOA), CSRC began the process to comply. At the January 2017 CSRC Board of Directors meeting, the definition and roles/responsibilities of the One-Stop Operator were approved. Please refer to Attachment A. The Request for Proposal (RFP) to procure the One-Stop Operator was also approved by the Board and an RFP was issued March 1, 2017. Through CSRC's competitive procurement process, a sub-recipient Agreement was awarded to Career and Technical Consultants, LLC for the period of July 1, 2017 through June 30, 2021 depending upon performance and to be renewed annually as approved by the Board.

The CSRC Programs & Services Committee, after reviewing the One-Stop Operator Performance Report for Program Year (PY) 2017-2018, approved the renewal of the One-Stop Operator Sub-Recipient Agreement with Career and Technical Consultants, LLC for PY 2018-2019. At their June 6, 2018 meeting, the CSRC full Board approved the renewal.

On January 7, 2019, Career and Technical Consultants, LLC submitted a letter of resignation to the CSRC President/CEO to become effective June 30, 2019. For compliance under WIOA, CSRC began the process of competitively procuring another One-Stop Operator. Through lessons learned and updated WIOA guidance, the CSRC Board updated the definition of the roles and responsibilities of the CSRC One-Stop Operator. Please refer to Attachment B. At their March 27, 2019 Board of Directors meeting, the updated definition and the RFP for a One-Stop Operator was approved.

info@careersourcerc.com
Administrative Office
584 NW University Boulevard, Suite 100 l Port Saint Lucie, FL 34986
p: 866.482.4473 l f: 866.314.6580

a proud partner of the americanjobcenter

careersourcerc.com

On March 28, 2019, CSR released a One-Stop Operator RFP to accept proposals from vendors for the period of July 1, 2019 through June 30, 2021. Please refer to Attachment C. CSRC conducted an open and competitive procurement process, fully compliant with CSRC's local procurement policies outlined in the CSRC Administrative Plan and consistent with the procurement standards of the Uniform Guidance at 2 CFR 200.318 through 200.326. CSRC requested and received a list and contact information of the State's LWDB One-Stop Operators and emailed each of them the One-Stop Operator RFP in addition to publically advertising the RFP and the utilization of CSRC's vendor list. All documentation related to the entire procurement process is in place and available for review if requested.

CSRC received one (1) proposal for the One-Stop Operator RFP. The proposal did pass technical review and was rated by a team consisting of two (2) CSRC administrative staff and one (1) CSRC Board member. Based upon the review of the rating team and the cumulative rating score, the rating team recommended the proposal not be approved.

At the May 29, 2019 Board of Directors meeting, the recommendation to not approve the proposal received for the One-Stop Operator, was passed. The Board of Directors also approved for CSRC administrative staff to move forward with requesting approval from the Governor and the local Chief Elected Official allowing CSRC to serve as the One-Stop Operator for LWDB 20.

Reason for Sole Source Selection: According to WIOA, a Local Board may be selected as a One-Stop Operator under limited conditions as described in 20 CFR 678.610 , 2 CFR 200.320 (f) and only with agreement of the local chief elected official and the Governor. The condition/criteria that CSRC meets in order to be selected through sole source is as follows:

- After solicitation of a number of sources, competition is determined to be inadequate, for reasons of number and quality of proposals received.

As identified, through two (2) formal RFP procurements, CSRC has received only three (3) bids. The first RFP issued in March of 2017, received two (2) proposals. The proposer chosen, Career and Technical Consultants, LLC, scored 20 points higher than the other proposer whose score was barely fair at a score of 72 out of 100. The second RFP issued only resulted in one proposer whose score was only at 61%.

CSRC, through experience and lessons learned, has clearly defined the role and responsibilities a One-Stop Operator must carry out in order to promote the efficiency and effectiveness of our Comprehensive One-Stop Career Center system. CSRC has had the opportunity to evaluate performance and costs against original expectations. Please refer to Attachment D, Cost Price Analysis.

As previously mentioned, CSRC had successfully performed One-Stop Operator functions in the role of the direct services provider of workforce services from January 2009 until July 1, 2017. Copies of our requests and approvals to perform these functions are on file with CSFL and the Department of Economic Opportunity (DEO).

CareerSource RESEARCH COAST

careersourcerc.com

CSRC has not received any monitoring or audit findings that indicate we have been out of compliance.

To identify the delineation of duties of the Board as the One-Stop Operator and Direct Services Provider, the duties of the One-Stop Operator have been clearly defined and will be reported to the CSRC Board of Directors. Please refer to Attachment B. The duties of CSRC as the direct services provider are outlined in the LWDB Local Plan. These duties are overseen by the CSRC President/CEO. The CSRC Board of Directors are responsible for governance, policy, strategy, oversight and financial integrity while the CSRC President/CEO manages the day to day provision of workforce services.

The CSRC Board of Directors follow CSFL's Board Contracting and Conflict of Interest Policy which is reviewed during board member orientation and reiterated in CSRC's Administrative Plan. Declarations of Conflict of Interest is an Agenda Item on every Board and Committee Meeting Agenda that includes voting items.

CSRC contracts with an independent monitoring firm for programmatic/fiscal monitoring. CSRC specifically requests this firm to monitor the One-Stop Operator functions. CSRC also contracts with a separate firm for auditing purposes.

Included with this request to be designated as the One-stop Operator for CareerSource Research Coast, LWDB 20, please find the following attachments:

- Copy of the 2019 One-Stop Operator RFP, (RFP # 19-002-OSO) - Attachment C
- Proof of Public Notice via our website - Attachment E
- Documentation of the time the public notice was posted – Attachment F
- Documentation of the approval of the local Chief Elected Official – Attachment G

Upon receipt of this request, should additional information or documentation be required, please contact Brian Bauer, President/CEO at 866-482-4473, ext# 418 or via email to bbauer@careersourcerc.com.

Attachment A

DEFINITION OF THE CAREERSOURCE RESEARCH COAST ONE-STOP OPERATOR

WIOA allows for options in the selection of a One-Stop Operator. The Operator may be a single entity or it may be multiple entities working together to form a consortium operator. The Operator may be for profit, non-profit, private or public. Staff is recommending that the CSRC Board should seek out a single individual (a 1099 entity) to serve as the One-Stop Operator.

- Having a single Operator is cost effective. The recommended cost would be equal to the equivalent of one FTE.
- A single Operator allows for clearer communication.
- Having a single Operator keeps the function straightforward and uncomplicated.

WIOA requires local workforce boards to competitively procure the One-Stop Operator. CSRC staff will follow our Board Policies to procure the One-Stop Operator.

The One-Stop Operator's major function will be the coordination of the service delivery among the required One-Stop Partners and their programs. The One-Stop Operator will be responsible to navigate between the One-Stop Partners to ensure there is coordination of service delivery for employers and career seekers within the LWDB 20 One-Stop System. The One-Stop Operator will be responsible to:

1. Learn, know and understand the One-Stop Partner's program services and performance requirements.
2. Monitor and ensure the required One-Stop System Partners have Memorandum of Understandings (MOUs) in place, with the roles and responsibilities of each partner clearly defined, current and are being adhered to as stated.
3. Serve as an intermediary to the required One-Stop System Partners, working with the partners for continuous improvement of the One-Stop System and fostering customer service excellence.
4. Assure the local One-Stop System has at least one comprehensive One-Stop Career Center that meets the required certification criteria and is compliant with State and Federal Regulations.
5. Review relevant information provided by the state, federal government and the required One-Stop partners to monitor the LWDB 20 One-Stop System's compliance and performance.
6. Submit written, quarterly reports to the CareerSource Research Coast Board of Directors. The reports should include:
    - A detail of the duties performed by the One-Stop Operator during the quarter
    - Observations made regarding the collaboration between the required One-Stop System Partners
    - Recommendations to improve the One-Stop partner's integrated service delivery to customers
    - The identification of best practices

Attachment B

INTERNAL FORM

DEFINITION OF THE CAREERSOURCE RESEARCH COAST ONE-STOP OPERATOR

WIOA allows for options in the selection of a One-Stop Operator. The Operator may be a single entity or it may be multiple entities working together to form a consortium operator. The Operator may be for profit, not profit, private or public. CareerSource Research Coast (CSRC), per 20 CFR § 678.620 requires, at a minimum, that the One-Stop Operator must coordinate the service delivery of the required one-stop partners and service providers.

WIOA requires local and workforce boards to competitively procure the One-Stop Operator. CSRC staff will follow our Board Policies to procure the One-Stop Operator.

The One-Stop Operator's major function will be the coordination of the service delivery among the required One-Stop Partners and their programs. The One Stop Operator will be responsible to navigate between the One-Stop Partners to ensure there is coordination of service delivery for employers and career seekers within the LWDB 20 One-Stop System. The One-Stop Operator will be responsible to:

1. Understand the mission, vision, and service delivery requirements of the required one-stop partners to better strategically align with CSRC priorities and services.
2. Review, update, and track all Memorandum of Understandings (MOUs) and Infrastructure Agreements (IFAs) to maintain compliance.
3. The One-Stop Operator will be responsible for monitoring the infrastructure cost responsibilities of the required partners to provide for the maintenance of the Comprehensive One-Stop Career Center as outlined in the Quarterly Cost Reconciliation and Allocation Base Section of the Infrastructure Agreement.
4. Work with CSRC designated staff to support building relationships with the required partners of the designated One-stop Career Center and track implementation of the activities and services as outlined in the MOUs.
5. Assure the local One-Stop System has at least one comprehensive One-Stop Career Center that meets the required certification criteria and is compliant with State and Federal Regulations.
6. Facilitate agreement, and support the development of a mutual client assessment and referral process; an agreed upon data sharing process, and a mechanism to capture performance between all partners.
7. Provide oversight and ongoing communication with the required partners to ensure referrals and related data sharing are followed through on a timely basis
8. Review relevant information provided by the state, federal government and the required One-Stop partners to monitor the LWDB 20 One-Stop System's compliance and performance.

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

9. Coordinate and convene quarterly meetings with all designated partners and CSRC to share information, discuss strategies to positively impact employment outcomes for shared clients, and problem-solve collaboration issues.

10. Conduct, at a minimum, six site visits of the Comprehensive One-Stop Career Center during each Program Year, July 1st through June 30th. These visits will include interviews with CSRC Management as well as the representatives of the required partner agencies.

11. Identify and recommend practices that encourage the designated Comprehensive One- Stop Career Center partners to provide services to individuals with barriers to employment, including individuals with disabilities, who may require longer-term services, such as intensive employment, training, and education services.

12. Manage, track and oversee a customer satisfaction initiative for the services provided through the CSRC Career Center System. Customer satisfaction reports are to be generated on an agreed upon schedule. The One-Stop Operator will be responsible for reviewing customer comments, identifying trend data and making continuous improvement recommendations to the CSRC Management team.

13. Submit written, quarterly reports to the CareerSource Research Coast Board of Directors. The reports should include:

- A detail of the duties performed by the One-Stop Operator during the quarter
- Observations made regarding the collaboration between the required One-Stop System Partners
- Recommendations to improve the One-Stop partner's integrated service delivery to customers
- The identification of best practices

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

Attachment C

CareerSource RESEARCH COAST

careersourcerc.com

March 28, 2019

Dear Provider:

The Workforce Development Board of Treasure Coast, Inc. d/b/a CareerSource Research Coast (CSRC) is seeking proposals for a One-Stop Operator in accordance with the Workforce Innovation and Opportunity Act (WIOA) sec. 121 (d) (2) (a), which requires the Local Workforce Development Board (LWDB) to competitively select a "one-stop operator" to support the implementation of services with the career center system locally. The One-Stop Operator may be a single entity or multiple entities working together to form a consortium operator.

Instructions for submitting proposals are included in the Request for Proposal (RFP). The RFP may be accessed through the CSRC's website at https://careersourcerc.com/rfp-19-002-oso-one-stop-operator/ or a copy may be picked up at the Board's Administrative Offices at 584 NW University Blvd., Suite 100, Port St. Lucie between the hours of 8:00 a.m. and 5:00 p.m., Monday through Friday.

Provider(s) must complete the RFP package as instructed and submit it by **4:30 p.m. on Tuesday, May 2, 2019**. All questions must be submitted via the CSRC website https://careersourcerc.com/rfp-19-002-oso-one-stop-operator/ by April 25, 2019. Answers to all questions received will be posted to the webpage.

This request is for the purpose of contracting with a One Stop Operator. The One-Stop Operator's major function, in a consultant role, will be the coordination of the service delivery among the required One-Stop Partners and their programs. Responses to this RFP are to be used to determine the best-qualified proposer and will be the basis for negotiating a contract. The contract, if awarded, will be a term of four (4) years as a one (1) year contract to be renewed annually based upon performance. Renewal will be the option of CSRC and its Board of Directors.

This request for proposal does not obligate the Board to award a contract, or contracts, nor will the Board pay any costs incurred in the preparation of proposals. The Board reserves the right to accept or reject any or all proposals received.

We look forward to hearing from you.

Sincerely,

Glenda Harden
Senior Vice President/COO)

Administrative Office
584 NW University Boulevard, Suite 100 l Port Saint Lucie, FL 34986
p: 866.482.4473 l f: 866.314.6580

a proud partner of the americanjobcenter

Request for Proposal

For

ONE-STOP OPERATOR

RFP #19-002-OSO

Date Issued: March 28, 2019

DEADLINE FOR SUBMISSION: May 2, 2019 at 4:30 pm

Responses should be directed to:

Glenda Harden, Senior Vice President/COO

CareerSource Research Coast

584 NW University Blvd., Suite 100

Port St. Lucie, FL 34986

(866) 482-4473

TABLE OF CONTENTS

General Information 3

A. Description of CareerSource Research Coast 3
B.. Background and General Information 3
C.. Scope of Work/Role of the One Stop Operator 4
D. Who May Apply 5
E. One Stop Operator Qualifications 5
F. Contract Term 5
G.. Funding 5
H. Additional Information 5
I. General Proposal Instructions 7
J.. Proposal Format 7
K. Solicitation Timelines 7
L. Proposal Submission 7
1. Proposal Deadline 8
2. Inquiries 9
3. Conditions of Proposal 9
4. Initial Technical Review 9
5. Review by RFP Review Team 9
6. Small and/or Minority-Owned Businesses 10
7. Proposal Acceptance/Protest 10
M. Negotiations 18
N. Notification of Award 11

Attachments

A. *CAREERSOURSE RESEARCH COAST COMPETITIVELY PROCURED SERVICE PROVIDERS & VENDORS* 11
B. CAREESOURCE RESEARCH COAST BOARD OF DIRECTORS 12
C. RELATIONSHIP DISLSOSURE FORM 14
D. WORKERS COMPENSATION RELEASE 15
E. PROPOSER CONTRACT CERTIFICATIONS 18
F. CERTIFICATION REGARDING DEPARTMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS 19
G. SWORN STATEMENT ON PUBLIC ENTITY CRIMES PURSUANT TO SECTION 287.133(3)(a);FL STATUTES 19

H. BYRD ANTI-LOBBYING CERTIFICATE----------21

I. NONDISCRIMINATION AND EQUAL OPPORTUNITY PROVISIONS ASSURANCE STATEMENT---------- 22

J. GENERAL PROVISIONS AND ASSURANCES----------23

K. INITIAL TECHNICAL REVIEW-ONE STOP OPERATOR RFP #19-002-OSO----------26

L. RATING SHEET FOR RFP #19-002-OSO---------- ----28

GENERAL INFORMATION

A. BACKGROUND AND GENERAL INFORMATION OF CAREERSOURCE RESEARCH COAST

The Workforce Development Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast (CSRC) is a not-for-profit corporation organized under the laws of the State of Florida, and has been determined exempt by the Internal Revenue Service under the provisions of IRS Code, Section 501(c)(3). CSRC is chartered by the State of Florida to create and manage a workforce development service delivery system responsive to the needs of businesses and jobseekers and has been certified by the Governor as a Local Workforce Development Area for the purposes of implementing programs authorized by the federal Workforce Innovation and Opportunity Act (WIOA), Temporary Assistance for Needy Families (TANF), Wagner Peyser and related enabling legislation. CSRC is the grant recipient and administrative entity for these funding sources under a Memorandum of Understanding with the local elected officials. Our principle function is the provision of, oversight of, and policy guidance to, the workforce development system in the three counties of Indian River, Martin and St. Lucie Counties.

To service these three counties of our local area, thousands of local job seekers and businesses receive employment and training services through four (4) Career Center operations located in each of the counties and one mobile service unit to service outlying areas. This includes one comprehensive Career Center located at 584 NW University Blvd., Suite 300 Port St. Lucie, FL 34986. The Career Centers are “one-stop” access points for the programs and services available through the system. Additional information about these programs and services may be found at CSRC’s website at www.careersourcerc.com.

B. BACKGROUND OF LEGISLATION FOR THE PURPOSE OF THIS RFP

The Workforce Innovation and Opportunity Act (WIOA) sets forth a vision for the workforce development system to operate as a comprehensive, integrated, streamlined system that aligns with the needs of business and is a force in helping stimulate local economies. Therefore, under WIOA, the Career Centers are required to partner with a range of federally funded employment and training programs to promote the coordination of services on behalf of job seekers and businesses. The programs and funding streams already integrated and delivered through CSRC’s Career Centers are as follows:

- WIOA Title 1 Adult, Dislocated Worker and Youth Programs
- Wagner-Peyser Employment Services
- Local Veterans’ Employment Programs
- Disabled Veterans’ Outreach Programs
- Trade Adjustment Assistance Programs
- Unemployment Compensation Programs
- Welfare Programs
- Migrant and Seasonal Farmworker Programs

Other mandated partners are as follows:

- Family Literacy and Adult Education Act
- Vocational Rehabilitation
- Career and Technical Education
- Community Services Block Grant
- Second Chance Act
- Department of Housing and Urban Development

Inclusive in the requirements under WIOA is the necessity to competitively select a "one-stop operator" to support the implementation of services with the career center system locally. Therefore, local workforce development boards are required to define the role of a One-Stop Operator and competitively procure the entity or entities as set forth in sec. 121 (d) (2) (a) of WIOA. The One-Stop Operator may be a single entity or multiple entities working together to form a consortium operator. The Operator may be for profit, non-profit, private or public. CSRC, per 20 CFR § 678.620 requires, at a minimum, that the One-stop Operator must coordinate the service delivery of the required one-stop partners and service providers.

C. SCOPE OF WORK/ROLE OF THE ONE STOP OPERATOR

The One-Stop Operator's, in a consultant role, major function will be the coordination of the service delivery among the required One-Stop Partners (as described in Section B of this RFP) and their programs. The One-Stop Operator will be responsible to navigate between the One-Stop Partners to ensure there is coordination of service delivery for employers and job seekers within the CSRC 20 One-Stop System. The One-Stop Operator will be responsible to:

1. Understand the mission, vision, and service delivery requirements of the required one-stop partners to better strategically align with CSRC priorities and services.
2. Review, update, and track all Memorandum of Understandings (MOUs) and Infrastructure Agreements (IFAs) to maintain compliance.
3. The One-Stop Operator will be responsible for monitoring the infrastructure cost responsibilities of the required partners to provide for the maintenance of the Comprehensive One-Stop Career Center as outlined in the Quarterly Cost Reconciliation and Allocation Base Section of the Infrastructure Agreement.
4. Work with CSRC designated staff to support building relationships with the required partners of the designated Comprehensive One-Stop Career Center and track implementation of the activities and services as outlined in the MOUs.
5. Assure the local One-Stop System has at least one comprehensive One-Stop Career Center that meets the required certification criteria and is compliant with State and Federal Regulations.
6. Facilitate agreement and support the development of a mutual client assessment and referral process; an agreed upon data sharing process; and a mechanism to capture performance between all partners.
7. Provide oversight and ongoing communication with the required partners to ensure referrals and related data sharing are followed through on a timely basis
8. Review relevant information provided by the state, federal government and the required One-Stop partners to monitor the CSRC One-Stop System's compliance and performance.

9. Coordinate and convene quarterly meetings with all designated partners and CSRC to share information, discuss strategies to positively impact employment outcomes for shared clients, and problem-solve collaboration issues.
10. Conduct, at a minimum, six site visits of the Comprehensive One-Stop Career Center during each Program Year, July 1st through June 30th. These visits will include interviews with CSRC Management as well as the representatives of the required partner agencies.
11. Identify and recommend practices that encourage the designated Comprehensive One-Stop Career Center partners to provide services to individuals with barriers to employment, including individuals with disabilities, who may require longer-term services, such as intensive employment, training, and education services.
12. Manage, track and oversee a customer satisfaction initiative for the services provided through the CSRC Career Center System. Customer satisfaction reports are to be generated on an agreed upon schedule. The One-Stop Operator will be responsible for reviewing customer comments, identifying trend data and making continuous improvement recommendations to the CSRC Management team.
13. Submit written, quarterly reports to the CareerSource Research Coast Board of Directors. The reports should include:
    - A detail of the duties performed by the One-Stop Operator during the quarter
    - Observations made regarding the collaboration between the required One-Stop System Partners
    - Recommendations to improve the One-Stop partner's integrated service delivery to customers
    - The identification of best practices

D. WHO MAY APPLY

Eligible proposers must meet one of the following criteria:

- The One-Stop Operator must be a single entity or multiple entities working together to form a consortium. If the consortium is comprised of One Stop Career Center partners, it must include a minimum of three (3) One Stop Career Center partners in 20 CFR 678.400;
- A public, private, for-profit or non-profit organization;
- An institution of higher education;
- A government agency;
- A community based, non-profit organization

E. ONE-STOP OPERATOR QUALIFICATIONS

CSRC seeks a Respondent entity that meets the following qualifications:

- Possess a strong business acumen and professional presence.
- Ability to work with various demographics in the three county area, specifically Martin, St. Lucie and Indian River Counties.
- An understanding of the Workforce Innovation and Opportunity Act. Similarly, a general understanding of the local workforce system and its stakeholders is preferred.

- Has contracted to provide services similar in nature and complexity, with at least one organization, within the past three (3) years.
- Ability to work closely with CSRC Administrative staff to monitor the system's strategic objectives and make recommendations for system continuous improvements.
- Be licensed to conduct business in the State of Florida.

F. CONTRACT TERM

Responses to this RFP are to be used to determine the best-qualified proposer and will be the basis for negotiating a contract. The contract, if awarded, will be a term of four (4) years as a one (1) year contract to be renewed annually based upon performance. Renewal will be the option of CSRC and its Board of Directors.

G. FUNDING

CSRC has approved funding of $30,000 - $35,000, per year, for the One-Stop Operator contract for the services requested in this RFP. The proposer is responsible for providing a reasonable and fair cost for services. CSRC reserves the right to negotiate amounts based on the entity's experience, ability to begin the project and understanding of the initiative.

H. ADDITIONAL INFORMATION

Addition information on CSRC, workforce development, legislation and programming, can be found at the following sources:

- CareerSource Florida - http://careersourceflorida.com/
- Florida Department of Economic Opportunity - http://www.floridajobs.org/
- CareerSource Research Coast - http://www.careersourcerc.com/
- U.S. Department of Labor Employment and Training Administration - https://www.doleta.gov/WIOA/FactSheet.cfm
- Uniform Guidance, 2 CFR, Part 200-*Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*
-

I. GENERAL PROPOSAL INSTRUCTIONS

Proposers are advised to read this entire RFP before preparing and submitting a proposal. Proposals which do not follow the format, do not include all the minimum requirements specified in this RFP or are not submitted by the due date will not be considered for funding.

CSRC will provide clarifying information about this request only. They are not available for technical assistance or advice. All questions regarding the RFP must be submitted via the CSRC website at https://careersourcerc.com/rfp-19-002-oso-one-stop-operator/. Questions must be submitted by April 25, 2019. Answers to all questions received will be posted to the webpage within 48 business hours. This is a competitive procurement. Employees will not provide any information from other

proposers/proposals or other costs associated with similar or like projects, either current or in the past.

Proposals and modifications thereof are to be enclosed in sealed envelopes and addressed to

Glenda Harden, Senior Vice President/COO
CareerSource Research Coast
584 NW University Blvd., Suite 100
Port St. Lucie, FL 34986

Please show the solicitation number **RFP #19-002-OSO** and the name and address of the proposer on the front of the envelope. **Proposals are to be received in CSRC's administrative office (address above) no later than 4:30 p.m. on Thursday, May 2, 2019.** All proposals will be date stamped as of the date and time received.

Proposers hand-delivering proposals will be responsible for ensuring that their proposal is date stamped and the time entered on the envelope at the time of drop-off.

Proposals may be modified or withdrawn by written notice. Modifications must be received at the above address prior to the date specified for receipt of proposals. No modifications will be accepted after the date and time noted above. Withdrawals will be accepted any time prior to execution of a contract.

All proposals must conform to the proposal format described below in this document and contain all the requested information and attachments **including three (3) references.**

One (1) copy bearing original signatures, where required, in **blue** ink and two (2) copies of the proposal and one electronic copy on company letterhead must be submitted.

Proposers are encouraged to keep proposals concise and to the point. Elaborate brochures are not wanted. The proposal and all attachments are to be standard size (8 1/2 x 11).

CSRC will furnish no material, labor or facilities for either development of a proposal or completion of the desired project unless otherwise provided for in this RFP.

J. PROPOSAL FORMAT

Proposals in response to this RFP shall adhere to the format outlined below:

1. Cover Letter: A cover letter with the RFP solicitation number and subject that includes a statement that the entity understands the scope of work/role of the One-Stop Operator and a total price quote to perform the work identified for the period of July 1, 2019 through June 30, 2020. The name of the entity, local address, phone number, fax number/e-mail address and name of the contact person should also be included.
2. Proposal Narrative: A narrative of not more than three (3) pages that outlines the following information: a) the entity's understanding and experience in workforce development, the local workforce system and of WIOA; b) overview of the entity's previous experience facilitating stakeholder groups to common goals/objectives; c) explanation of the approach

to providing each of the One-Stop Operator responsibilities (refer to section C of this RFP) and d) other information, experience, deemed relevant to this proposal.

3. License Information: Provide a copy of your State of Florida business license.
4. Budget Information: Provide a total cost for the delivery of the services described in the Scope of Work, Section C of this RFP, as well as budget detail by line item.
5. Completed Relationship Disclosure Form: (Attachment C)
6. List of and Contact Information of Three (3) References
7. Signed Sub-Recipient General Provisions, Certifications and Assurances: (Attachment J)

K. SOLICITATION TIMELINES

Mailing/advertising of RFP	March 28, 2019
Final date for questions related to RFP	April 25, 2019
Proposals Due	May 2, 2019, by 4:30 p.m.
Technical Review	May 6, 2019
Rating Team Review	May 8, 2019
CareerSource Research Coast's Approval/Contract Award	May 29, 2019
Contract Execution begins	July 1, 2019

L. PROPOSAL SUBMISSION

1. PROPOSAL DEADLINE

a. The Proposer must submit one (1) original and two (2) copies of the proposal, plus attachments (Cover Letter, Proposal Narrative, Completed Relationship Disclosure Form, List of three (3) references and Proposer's Acceptance of General Provisions, Assurances and Certifications) to CSRC no later than 4:30 p.m. EST on Thursday, May 2, 2019, in order to be considered. **Proposals delivered after the time specified will not be considered.** Changes, modifications or additions cannot be made to a proposal after the submission date.

2. INQUIRIES

A. Inquiries concerning the RFP should be directed to https://careersourcerc.com/rfp-19-002-oso-one-stop-operator/. All requests must be submitted via the CSRC website.

3. CONDITIONS OF PROPOSAL

a. The following conditions are applicable to all proposals:

b. CSRC reserves the right to reject any and all proposals, in whole or in part, and to accept any proposal that is deemed most favorable to CSRC at the time and under the conditions stipulated in this RFP.

c. Non-conforming proposals will be considered non-responsive and are subject to return without review; however, CSRC reserves the right to waive informalities and minor irregularities in the proposals received.

d. CSRC reserves the right to request additional information from proposers for clarification or to allow corrections of errors or omissions, if in the best interest of CSRC and its Board of Directors.

e. All proposals are subject to negotiation by CSRC.

f. CSRC reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the entity of the conditions contained in this request for proposals unless clearly and specifically noted in the proposal submitted and confirmed in the contract between CSRC and the entity selected.

g. All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the Proposer and will not be reimbursed by CSRC. The Proposer must, at their own expense, obtain all necessary permits and pay all licenses, fees, insurances and taxes required to comply with all local ordinances, state and federal laws, rules and regulations applicable to business to be carried out under the proposed contract.

4. INITIAL TECHNICAL REVIEW

All timely proposals received will be reviewed by CSRC's employees to determine if they are responsive and if the proposals are eligible for further consideration. Proposals may be judged nonresponsive and removed from further consideration if the proposal is not received timely in accordance with the terms of this RFP; does not follow the specified format; does not include the required certifications; and is not adequate to form a judgment by the reviewers that the proposal meets the needs of CSRC and the intent of this RFP.

5. REVIEW BY RFP REVIEW TEAM

An RFP Review Team consisting of members of CSRC's Board of Directors and employees will be organized to review and rate proposals. This team will review proposals successfully passing the initial technical review. Proposals will be evaluated using a point system. (See Attachment L - Rating Sheet for RFP #19-002-OSO). The Team will review and discuss their evaluations of all proposals, combine the individual scores and arrive at a composite technical score for each proposal. These scores will be used to determine the most advantageous contract award for CSRC.

6. SMALL AND/OR MINORITY-OWNED BUSINESSES

Efforts will be made by CSRC to utilize local small business, minority, veteran or women-owned businesses. A Proposer qualifies as a small business firm if it meets the definition of "Small Business" as established by the Small Business Administration (13 CFR 21.3-8) by having average annual receipts for the last three fiscal years of less than four million dollars.

7. PROPOSAL ACCEPTANCE/PROTEST

This request for proposal does not obligate CSRC to award a contract. CSRC reserves the right to accept or reject any or all proposals received. The contract, if awarded, will be for four (4) years with a one (1) year contract to be renewed annually based upon performance.

Any award resulting from this request will be based on the entity's stability and experience related to this RFP, the entity's ability to handle the tasks noted in this RFP and the entity's cost.

CSRC reserves the right to waive informalities and minor irregularities in offers received.

Before a contract is offered, the Proposer must submit the required certifications provided in this packet. **If you are unable to provide this information, please do not submit a proposal.**

CSRC may award a contract based on initial proposals received without negotiation of such proposals. Therefore, each initial proposal should be submitted on the most favorable price and technical terms. CSRC reserves the right to request additional information, oral discussion or presentation in support of written proposals.

If an award is made, the contract will be a cost-reimbursement contract, as needed. Services will be implemented only upon notification from CSRC. Payment for services rendered will be made only when costs have been incurred and documentation of all costs are received and verified.

All Proposers have the right to protest the award. Parties wishing to protest a contract award may submit their objections in writing within 10 days of the award date to the President/CEO of CSRC who will provide the information to CSRC's Executive Committee. This committee will investigate the complaint and issue a written finding and resolution to the protesting party within 45 days of the receipt of the complaint.

This protest procedure provides recourse to Proposers who believe that their proposal did not receive proper consideration. Proposers entering a protest should be prepared to document specific factors that put the aggrieved Proposer at a competitive disadvantage and/or document violations of specific sections of state or federal regulations, CareerSource Florida, Inc., and the procedures set forth by this RFP. CSRC reserves the right to refuse to consider an appeal that does not identify specific procedural shortcomings.

M. NEGIOTATIONS

A contract will be negotiated with the first ranked Proposer, and if negotiations are successful, that Proposer will be recommended to CSRC Board of Directors for award. In the event negotiations are not successful, negotiations with that Proposer will be terminated and negotiations begun with the second ranked Proposer and so forth until negotiations are successfully completed to the satisfaction of CSRC or until all acceptable proposals have been rejected.

N. NOTIFICATION OF AWARD

Upon conclusion of final negotiations with the successful Proposer, all Proposers will be notified in writing of their status. The final award decision will be made no later than May 29, 2019. Contract negotiations may commence any time following that date and are to be completed by Friday June 14, 2019 with an execution date of contract to begin July 1, 2019.

THE REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK.

ATTACHMENT A

CAREERSOURCE RESEARCH COAST COMPETITIVELY PROCURED SERVICE PROVIDERS & VENDORS

James Moore, CPA & Consultants
121 Executive Circle
Daytona Beach, FL 32114-1180

Giddens Security Corporation
528 South Edgewood Avenue
Jacksonville, FL 32205

Manpower
11211 Prosperity Farms Road, Suite C-210
Palm Beach Gardens, FL 33410

Taylor, Hall, Miller, Parker, P.A.
225 East Robinson Street, Suite 455
Orlando, FL 32801

Eckerd Connects, Inc.
100 North Starcrest Drive
Clearwater, FL 33765

Stockton Maintenance Group
1975 Sansbury's Way, Suite 116
West Palm Beach, FL 33411

ATTACHMENT B

CAREERSOURCE RESEARCH COAST LDWB20 WORKFORCE BOARD MEMBERS

1. Werner Bols, President, Bols Construction
2. Pamela Burchell, Director of Human Resources, Indian River Medical Center
3. Helene Caseltine, Director of Economic Development, Indian River County Chamber of Commerce
4. Robert Cenk, Vice President, Homecrete Homes, Inc.
5. Suzanne Desposati, Counselor Analyst, Vocational Rehabilitation
6. David Freeland, President, St. Lucie County CTA/CU
7. Carrol Frischkorn, Vice President, Frischkorn Builders
8. Wayne Gent, Superintendent, St. Lucie Public Schools
9. Jill Hanson, Director of Sales, Residence Inn
10. Lawrence Hawes, General Manager, Lenco Marine
11. Pamela Houghten, VP of Administration & Outreach, Torrey Pines Institute for Molecular Studies
12. Leslie Kristof, President, Keiser University
13. Edwin Massey, President, Indian River State College
14. Jeannie McCall, Director of Human Resources, Paradigm Precision
15. Sean P. Mitchell, Commissioner, St. Lucie County Board of County Commissioners
16. Terrance Moore, CEO, Moore Solutions, Inc.
17. Dennis Parker, Training Director, Local Union 630 Apprenticeship
18. Debbie Perez, Corporate Director of Workforce Planning & Compensation, Martin Health Systems
19. Mark Rendell, Superintendent, School District of Indian River County
20. Waldo Tames, President/CEO, LF Staffing & Labor Finders of Florida, LLC.

21. Wayne Teegardin, Veteran Services Manager, St. Lucie County

22. Pete Tesch, Executive Director, St. Lucie County Economic Development Council

23. Angella Williams, VP of Human Resources, Treasure Health

24. Maddie Williams, President, Treasure Coast Builder's Association

CAREERSOURCE RESEARCH COAST, LWDB20, TREASURE COAST WORKFORCE CONSORTIUM MEMBERS

1. Tim Zorc, Commissioner	Indian River County
2. Doug Smith, Commissioner	Martin County
3. Linda Bartz, Commissioner	St. Lucie County

ATTACHMENT C

RELATIONSHIP DISCLOSURE FORM

This form must be completed by the Proposer.

In the event any information provided on this form should change, the Proposer must file an amended form on or before the date the item is considered by CareerSource Research Coast.

Part I: Information on Proposer

Legal Name of Proposer: _____

Business Address: _____

_____

Phone Number: _____ Fax Number: _____

Part II:

Is Proposer a relative of any CareerSource Research Coast principal? ☐ Yes ☐ No

Is any CareerSource Research Coast principal an employee of proposer? ☐ Yes ☐ No

Is Proposer an employee of any CareerSource Research Coast principal? ☐ Yes ☐ No

Is Proposer a business associate of any CareerSource Research Coast principal? ☐ Yes ☐ No

If you responded "Yes" to any of the above questions, please state with whom and explain the relationship (use additional sheets if necessary): _____

_____

_____

Part III: Original Signature Required

I hereby certify that information provided in this relationship disclosure form is true and correct based on my knowledge and belief. If any of this information changes, I further acknowledge and agree to amend this relationship disclosure form prior to the date of which CareerSource Research Coast awards a contract for youth services. In accordance with s.837.06 Florida Statutes, I understand and acknowledge that whoever knowingly makes a false statement in writing with the intent to mislead a public servant in the performance of his or her official duty shall be guilty of a misdemeanor in the second degree, punishable as provided in s.775.082 or s.775.083, Florida Statutes.

_____

Printed Name/Title of Person Completing Form

_____

Signature

_____

Date

ATTACHMENT D

WORKER'S COMPENSATION RELEASE

This unconditional release, waiver and hold harmless agreement is given by the undersigned to the Workforce Development Board of the Treasure Coast, as a specific condition of the undersigned performing work for the Workforce Development Board of the Treasure Coast as an independent Contractor. It is the intent of the undersigned that the Workforce Development Board of the Treasure Coast rely on the statements made herein as being true, correct and all representations are predicated on the personal information and knowledge of the undersigned.

1. The undersigned is retained by the Workforce Development Board of the Treasure Coast, as an independent Contractor as that term applies in the State of Florida and as interpreted by the Internal Revenue Code, as amended. The undersigned is in no way connected with, an employee of, or otherwise related to the Workforce Development Board of the Treasure Coast, in any manner except by and through an independent Contractor relationship.

2. The undersigned hereby agrees that all employees or subcontractors hired by the undersigned to work on any project involving the Workforce Development Board of the Treasure Coast shall be covered by Worker's Compensation in accordance with the laws of the State of Florida as same may exist from time to time.

3. The undersigned for him/herself, his/her heirs, successors, assigns, employees, agents, subcontractors, employees of subcontractors and all of their successors, heirs, assigns and agents, warrants that no one shall file a claim for Worker's Compensation benefits by, through or against the Workforce Development Board of the Treasure Coast for which the Contractor has been engaged through a contract to perform services.

4. The undersigned hereby agrees to indemnify, defend, save and hold harmless, the Workforce Development Board of the Treasure Coast from any and all liability of any nature whatsoever, without limitation, arising out of any Worker's Compensation claim filed by the undersigned, its employees, agents, heirs, successors, subcontractors, or the agents, employees, heirs or successors of such subcontractors and employees. This hold harmless agreement shall include, but not be limited to, the cost of judgment, settlement, investigation, attorney's fees, court costs and the like. It is specifically intended that this hold harmless agreement be broad in scope and without limitation, such that Workforce Development Board of the Treasure Coast is protected to the greatest extent allowed by law from any such claims.

5. The undersigned, for him/herself, his/her agents, employees, heirs, successors, assigns, subcontractors and the employee's, agents, successors or assigned of such subcontractors and employees hereby releases the Workforce Development Board of the Treasure Coast from any and all claims for Worker's Compensation Liability, or any other liability arising out of any injury on the job, without limitation or reservation.

6. This waiver, release and hold harmless agreement is given by the undersigned to the Workforce Development Board of the Treasure Coast in contemplation of, and for the specific purpose of, releasing the Workforce Development Board of the Treasure Coast from any and all liability of any nature whatsoever resulting from injuries on the job, or work related injuries, or worker's compensation claims under the laws from the State of Florida as same may exist from time to time. It is specifically understood that the Workforce Development Board of the Treasure Coast shall have no such liability, and further that the undersigned is fully accepting, all such responsibility and liability.

7. This agreement is given freely, voluntarily, knowingly and intentionally by the undersigned without the exercise of force, coercion or undue influence by the Workforce Development Board of the Treasure Coast or any of its agents, employees, officers or any other person acting for, or on behalf of the Workforce Development Board of the Treasure Coast. The undersigned knows and understands the intent of this agreement and is aware of the legal implications of the same, and has had the advice of counsel, or alternatively has waived the advice of counsel and is proceeding notwithstanding same.

8. This agreement shall be construed in accordance with the laws of the State of Florida as may exist from time to time. The parties hereto agree to venue and jurisdiction in the courts of St. Lucie County, Florida for the resolution of all disputes connected hereto. In any event of any litigation to enforce the terms and conditions of this agreement, the prevailing party shall be entitled to recover actual attorney's fees and costs.

9. The foregoing terms and conditions constitute the entire agreement by and between the parties hereto. Any representations not contained herein shall be of no force or effect and shall be null and void.

10. In the event a court of competent jurisdiction shall determine any term or condition to be illegal, or otherwise unenforceable, the remaining terms and conditions of this agreement shall be given full force and effect to the greatest extent possible to carry out the stated intent of the parties.

_____

Contractor

_____

Name and Title of Certifying Representative

_____

Signature of Certifying Representative

_____

Date

ATTACHMENT E

PROPOSER CONTRACT CERTIFICATIONS

On behalf of the Proposer:

A. The individual signing certifies that he/she is authorized to contract on behalf of the Proposer.

B. The individual signing certifies that the Proposer is not involved in any agreement to pay money or other consideration for the execution of this agreement, other than to an employee of the Proposer.

C. The individual signing certifies that he/she has read and understands all of the information in this agreement, including the information on the programs/grants/contracts/regulations and laws. Ignorance of the requirements will not relieve the Proposer from liability and obligations under the contract.

D. The individual signing certifies that the Proposer and any individuals to be assigned to the agreement do not have a record of substandard work or found in violation of any state standards. If the Proposer or any individual to be assigned to the agreement has been found in violation of any state or professional standards at any time, this information must be disclosed.

E. The individual signing certifies that the Proposer and any individuals to be assigned to the agreement have not been disbarred or suspended under Federal or State rulings from participating in receipt of funds under the agreement. The individual signing must also certify that the organization will not enter into contracts with subcontractors who are debarred or suspended from these transactions, nor are they presently retained by any of the Board's current service providers.

F. The individual signing certifies that the Proposer will not use contract funds to lobby and will freely sign the attached Byrd Anti-Lobbying Certification (Attachment H).

G. The individual signing certifies that the Proposer carries Worker's Compensation coverage for its employees and will freely sign the attached Worker's Compensation Release form (Attachment D).

H. The individual signing certifies as to the Proposer's Federal Employer's Identification Number (FEIN) and will provide the number to CSRC's Financial Department.

I. The individual signing certifies that the Proposer is bound by federal, state or local affirmative action/EEO rules and that it has filed all required EEO reports to cognizant government agencies.

J. The individual signing certifies that if there is a subcontract or partnership effort it must be fully explained and that signed certifications will be required by the Board from the principals of all firms.

K. The individual signing certifies that the Proposer will comply with requirements of the Workforce Development Board of the Treasure Coast /dba CareerSource Research Coast's General Provisions and Assurances (Attachment J).

_____

Proposer

_____

Name and Title of Certifying Representative

_____

Signature of Certifying Representative

_____

Date

ATTACHMENT F

CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS

1. The Proposer certifies to the best of its knowledge and belief, that it and its principal:

   A. Are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any federal department or agency.

   B. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction, violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statement, or receiving stolen property;

   C. Are not presently indicated for or otherwise criminally or civilly charged by a government entity (federal, state, or local) with commission of any of the offenses enumerated in paragraph (1)(B) of this certification; and

   D. Have not within a three-year period preceding this application/proposal/contract had one or more public transactions (federal, state, or local) terminated for cause or default.

2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall submit an explanation to CSRC.

_____

Proposer

_____

Name and Title of Certifying Representative

_____

Signature of Certifying Representative

_____

Date

ATTACHMENT G

SWORN STATEMENT ON PUBLIC ENTITY CRIMES PURSUANT TO SECTION 287.133(3)(A); FLORIDA STATUTES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to: The Workforce Dev. Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast by _____
(print individual's name and title)

for _____
(print name of entity submitting sworn statement)

whose business address is _____

and (if applicable) its Federal Employer Identification Number is _____ (if the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement.)

2. I understand that a "public entity crime" as defined in Paragraph 287.133 (1) (g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133 (1) (b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that an "affiliate" as defined in Paragraph 287.133 (1) (a), Florida Statutes, means:

   a. A predecessor or successor of a person convicted of a public entity crime; or
   b. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who

knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5. I understand that a "person" as defined in Paragraph 287.133 (1) (e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

6. Based on information and belief, the applicable statement which I have marked below is true in relation to the entity submitting this sworn statement.

☐ Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

☐ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

☐ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989; however, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted Proposer list. Attached is a copy of the final order.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED, OR THROUGH THE END OF THE CONTRACT FOR WHICH IT IS BEING SIGNED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

Signature: _____

Date: _____

NOTARY PUBLIC

STATE OF _____ COUNTY OF_____

PERSONALLY APPEARED BEFORE ME, the undersigned authority, _____
(name of individual signing)

who, after first being sworn by me, affixed his/her signature in the space provided above on

this _____day of _____, 20___

My commission expires: _____

ATTACHMENT H

BYRD ANTI-LOBBYING CERTIFICATE

Certification for Contracts, Grants, Loans, and Cooperative Agreements (to be submitted with each bid or offer exceeding $100,000)

APPLICABLE TO THIS CONTRACT: Yes: ☐ No: ☐

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

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for making lobbying contacts to an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form--LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions as amended by "Government wide Guidance for New Restrictions on Lobbying," 61 Fed. Reg. 1413 (1/19/96).

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by 31, U.S.C. § 1352 (as amended by the Lobbying Disclosure Act of 1995). Any person who fails to file the required certification shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure.

Pursuant to 31 U.S.C. § 1352(c)(1) -(2)(A), any person who makes a prohibited expenditure or fails to file or amend a required certification or disclosure form shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such expenditure or failure.

The Proposer, _____, certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Contractor understands and agrees that the provisions of 31 U.S.C. A 3801, *et seq.,* apply to this certification and disclosure.

_____

Proposer

_____

Name and Title of Certifying Representative

_____

Signature of Certifying Representative

_____

Date

ATTACHMENT I

NONDISCRIMINATION AND EQUAL OPPORTUNITY PROVISION ASSURANCE STATEMENT

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

- Section 188 of the Workforce Innovation & Opportunity Act (WIOA), which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIOA/WIA Title I- Financially assisted program or activity;
- Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color, and national origin;
- Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities;
- The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age;
- Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs;
- Section 654 of the Omnibus Budget Reconciliation Act of 1981 prohibiting discrimination on the basis of race, creed, color, national origin, sex, handicap, political affiliation or beliefs;
- The American with Disabilities Act of 1990, P.L. 101-336 prohibiting discrimination in all employment practices, including the job application procedures, hiring, firing, advancement, compensation, training, and other terms, conditions, and privileges of employment. It applies to recruitment, advertising, tenure, layoff, leave, fringe benefits, and all other employment-related activities; and

The Proposer also assures that it will comply with 29 CFR Part 37 and all other regulation implementing the laws listed above.

For construction contracts in excess of $10,000, the Proposer will comply with Executive Order 11246 of September, 24, 1965, entitled “Equal Employment Opportunity” as amended by Executive Order 11375 of October 13, 1967, and supplemented on Department of Labor regulations at 41 CFR Chapter 60.

Failure to comply with these provisions may result in termination of any contract or agreement with the Workforce Development Board of the Treasure Coast Inc. d/b/a CareerSource Research Coast-LWDB 20.

I certify that I have read the above statement and on behalf of _____ agree to comply fully with the provisions contained therein.

_____
Proposer

_____
Name and Title of Certifying Representative

_____
Signature of Certifying Representative

_____
Date

Management Act of 1972 (16 U.S.C. 1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. 7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended, (P.L. 93-523); and (h) protection of endangered species under the Endangered Species Act of 1973, as amended, (P.L. 93-205). The Proposer will comply with the Solid Waste Disposal Act, as amended by the Resource Conservation and **GENERAL PROVISIONS AND ASSURANCES**

The Workforce Development Board of the Treasure Coast Inc. d/b/a CareerSource Research Coast (CSRC) will not award a grant where the Proposer has failed to accept the GENERAL PROVISIONS, CERTIFICATIONS AND ASSURANCES contained in this section. In performing its responsibilities under this agreement, the Proposer hereby certifies and assures that it will fully comply with the following:

By signing the agreement, the Proposer is providing the assurances and certifications as detailed below:

1. **COMPLIANCE WITH POLICIES AND LAWS**
   The warranty of this Section specifically includes compliance by Proposer and its subcontractors with the provisions of the Immigration Reform and Compliance Act of 1986 (P. L. 99-603), the Workforce Innovation and Opportunity Act (WIOA), the provisions of the Workforce Investment Act of 1998, the Workforce Innovation Act of 2000, 45 CFR 98, the Temporary Assistance for Needy Families Program (TANF), 45 CFR parts 260-265, and other applicable federal regulations and policies promulgated thereunder and other applicable State, Federal, criminal and civil law with respect to the alteration or falsification of records created in connection with this Agreement. Office of Management and Budget (OMB) Circulars: Contractor agrees that, if applicable, it shall comply with all applicable OMB circulars, such as 2 CFR 200. Contractor will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. 276a to 276a7), the Copeland Act (40 U.S.C. 276c and 18 U.S.C. 874, and the Contract Work Hours and Safety Standards Act (40.327-333), regarding labor standards for federally assisted construction sub agreements.

2. **CERTIFICATION REGARDING CLEAN AIR ACT, WATER ACT, ENERGY EFFICIENCY AND ENVIRONMENTAL STANDARDS, SOLID WASTE**
   Clean Air and Water Act: When applicable, if this Contract is in excess of $100,000, Proposer shall comply with all applicable standards, orders or regulations issued under the Clean Air Act as amended (42 U.S.C. 7401), Section 508 of the Clean Water Act as amended (33 U.S.C. 1368 et seq.), Executive Order 11738 and Environmental Protection Agency regulations (40 CFR Part 15). The Proposer shall report any violation of the above to the contract manager. Energy Efficiency: The Proposer shall comply with mandatory standards and policies relating to energy efficiency which are contained in the State of Florida's Energy Conservation Plan issued in compliance with the Energy Policy and Conservation Act (Public Law 94-163).

   Proposer will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d)

evaluation of flood hazards in flood plains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Recovery Act (42 U.S.C. 6962).

3. CONFIDENTIALITY

It is understood that the Proposer shall maintain the confidentiality of any information, regarding CSRC customers and the immediate family of any applicant or customer, that identifies or may be used to identify them and which may be obtained through application forms, interviews, tests, reports from public agencies or counselors, or any other source. Proposer shall not divulge such information without the written permission of the customer, except that such information which is necessary as determined by CSRC for purposes related to the performance or evaluation of the Agreement may be divulged to CSRC or such other parties as they may designate having responsibilities under the Agreement for monitoring or evaluating the services and performances under the Agreement, or to governmental authorities to the extent necessary for the proper administration of the law. All release of information shall be in accordance with applicable State laws, and policies of the CSRC. No release of information by Proposer, if such release is required by Federal or State law, shall be construed as a breach of this Section.

4. RIGHTS TO DATA/COPYRIGHTS AND PATENTS

CSRC, State of Florida and the U.S. Department of Labor shall have unlimited rights to inventions made under contract or agreement: Contracts or agreements for the performance of experimental, developmental, or research work shall provide for the rights of the Federal Government and the recipient in any resulting invention in accordance with 37 CFR part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements” and any implementing regulations issued by the awarding agency.

5. MONITORING

At any time and as often as CSRC, the State of Florida, United States Department of Labor, Comptroller General of the United States, the Inspector Generals of the United States and the State of Florida, or their designated agency or representative may deem necessary, Proposer shall make available all appropriate personnel for interviews and all financial, applicant, or participant books, documents, papers and records or other data relating to matters covered by this contract, for examination and/or audit, and/or for the making of excerpts or copies of such records for the purpose of auditing and monitoring activities and determining compliance with all applicable rules and regulations, and the provisions of this Agreement. The above referenced records shall be made available at the Proposer's expense, at reasonable locations as determined by CSRC. Proposer shall respond in writing to monitoring reports and requests for corrective action plans within 10 working days after the receipt of such request from CSRC.

6. TERMINATION FOR DEFAULT/CONVENIENCE

This modified agreement may be terminated as follows:

a. Either party may request termination of modified agreement upon 30 days’ prior written notice to the other party.
b. CSRC may unilaterally terminate or modify this modified agreement, if for any reason either the U.S. Department of Labor or the State of Florida reduces funding through the grants under which this modified agreement is funded.
c. CSRC may unilaterally terminate this modified agreement at any time that it is determined that:
    i. Proposer fails to provide any of the services it has contracted to provide; or
    ii. Proposer fails to comply with the provisions of this modified agreement; or

iii. Such termination is in the best interest of CSRC.

d. Written notification of termination must be by registered mail, return receipt requested.

If Proposer disagrees with the reasons for termination, they may file a grievance in writing within ten days of notice of termination to CSRC, who will conduct a grievance hearing and decide, from evidence presented by both parties, the validity of termination.

In the event this modified agreement is terminated for cause, Proposer shall be liable to CSRC for damages sustained for any breach of this modified agreement by the Proposer, including court costs and attorney fees, when cause is attributable to the Proposer.

In instances where Proposers/sub grantees violate or breach modified agreement terms, CSRC will use all administrative, contractual or legal remedies that are allowed by law to provide for such sanctions and penalties as may be appropriate.

_____

Proposer

_____

Name and Title of Certifying Representative

_____

Signature of Certifying Representative

_____

Date

ATTACHMENT K

INITIAL TECHNICAL REVIEW – ONE-STOP OPERATOR RFP #19-002-OSO

PROPOSER: _____

Did the proposal meet all of the following criteria? If not, the proposal may not be submitted for further review.

Proposal met due date and time:	Yes ☐ No ☐
Proposal included one original, two copies and an electronic version?	Yes ☐ No ☐
Original proposal contains representative signature(s) in blue ink?	Yes ☐ No ☐
Proposal was submitted in proper format?	Yes ☐ No ☐
Proposer included three (3) current references?	Yes ☐ No ☐
Proposer provided a fee schedule as requested?	Yes ☐ No ☐
Proposer indicated a financial relationship with CSRC Board of Directors, the Consortium and the relationship is a conflict of interest?	Yes ☐ No ☐

Employees Review Results:

Proposer has previously provided services to CSRC or other similar government funded programs?	Yes ☐ No ☐
If yes, employees will prepare a statement to indicate past program performance, cost, and note any outstanding issues. All outstanding issues must be resolved prior to consideration of a new contract.	Yes ☐ No ☐

References were contacted by CSRC's employees and the information indicates the provider is capable of delivering the services requested?	Yes ☐ No ☐
The proposer is licensed to conduct business in the State of Florida?	Yes ☐ No ☐
FORWARD TO THE RATING COMMITTEE	**Yes ☐ No ☐**

Technical Review Completed by: _____

Date: _____

THIS PAGE INTENTIONALLY LEFT BLANK

ATTACHMENT L

RATING SHEET FOR RFP #19-002-OSO

PROPOSER: _____

DATE RATED: _____ SCORE: _____ RANK: _____

SCORING: *Total Possible Score: 100*

Raters: Evaluate each of the following areas and record your response (score) in the blank provided at the end of each question or statement. Explain your evaluation in the Comments.

RATING CRITERIA **SCORE**

1. The entity demonstrates an understanding of the workforce system and the role of the One-Stop Operator as defined by WIOA. _____

More Than Adequate …….. Not
20 15 10 5 0

Comments: _____

_____

_____

_____

_____

2. The entity has contracted to provide services similar in nature and complexity. _____

Experienced …… No Experience

10 8 5 3 0

Comments: _____

_____

_____

_____

_____

3. The entity has previous experience building relationships among stakeholders to achieve goals and objectives.

_____

Experienced ……..No Experience

20 15 10 5 0

Comments: _____

_____

_____

4. The Proposer's compensation and costs are reasonable.

_____

Very Reasonable …… …… Not Reasonable

20 15 10 5 0

Comments: _____

_____

_____

5. The Proposer provided an adequate explanation of their approach to providing each of the defined One-Stop Operator responsibilities. (Total = 30 points)

   a. Understand the mission, vision, and service delivery requirements of the required one-top partners to better strategically align with CSRC priorities and services.

   _____

   ……

   5 3 0

Comments: _____

_____

_____

b. Review, update and track all MOUS to include monitoring of the infrastructure cost responsibilities of the required partners to provide for the maintenance of the Comprehensive One-Stop Career Center. _____

.....

5 3 0

Comments: _____

_____

_____

c. Manage, track and oversee a customer satisfaction initiative for the services provided through the CSRC Career Center System.

_____

.....

5 3 0

Comments: _____

_____

_____

d. Assure the local One-Stop System has at least one comprehensive One-Stop Career Center that meets the required certification criteria and is compliant with State and Federal regulations.

_____

.....

5 3 0

Comments: _____

_____

_____

e. Remain informed on relevant information in order to monitor CSRC One-Stop System's Compliance and performance

_____

……

5 3 0

Comments: _____

_____

_____

f. Coordinate and convene quarterly meetings with all designated partners and CSRC to share information, discuss strategies to positively impact employment outcomes for shared clients, and problem-solve collaboration issues.

_____

……

5 3 0

Comments: _____

_____

_____

- Conduct, an a minimum, six (6) site visits of the Comprehensive One-Stop Career Center during each Program Year, July 1st through June 30th. These visits will include interviews with CSRC Management as well as the representatives of the required partner agencies.

_____

Capability/Competent……Not Capable

20 15 10 5 0

Comments: _____

_____

_____

TOTAL ALL POINTS (Add scores 1-5):

_____
(Total)

RATED BY: _____

Signature

Other comments or concerns: _____

_____

_____

_____

_____

_____

_____

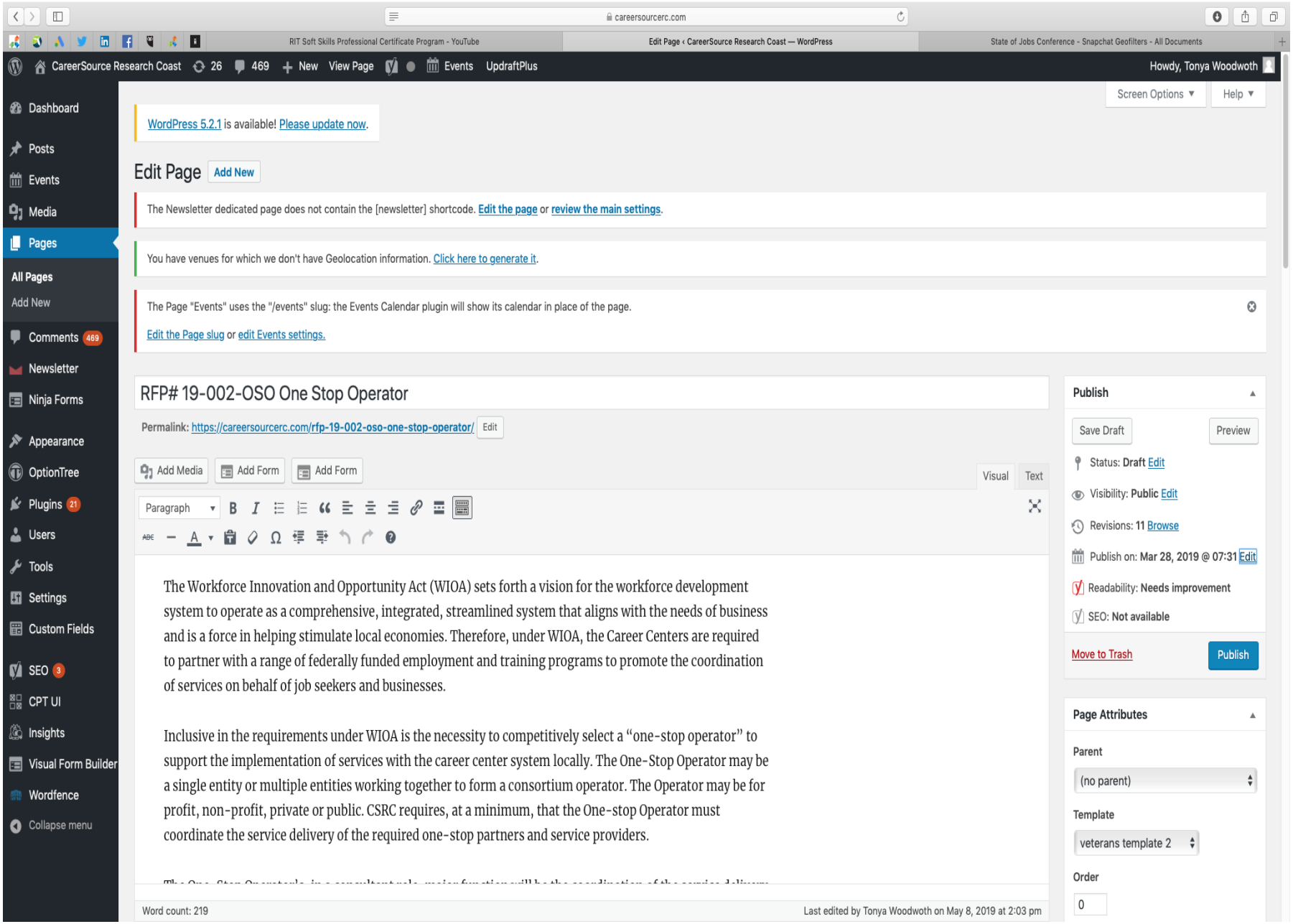
_____

Attachment D

PY 19·20 One Stop Operator Cost Price Analysis				
	%of Job duties	Hours	Rate	
Outside vendor One Stop Operator		1,040	33.65	**35,000.00**
In house One Stop Operator				
Comprehensive Career Center Mgr	11.54%	240.00	28.85	6,923.06
Director of Operations	12.90%	268.39	31.25	8,387.10
		508.39		**15,310.16**
Increase / Savings for In House CSRC OSO				**19,689.84**
Historical data for previous OSO				
PY 17-18		523.00	33.65	17,600.46
*PY 18-19		348.00	33.65	11,711.23

• One Stop Operator invoices through 2128119 time annualized through 6130119

Attachment E


careersourcerc.com
RIT Soft Skills Professional Certificate Program - YouTube
Edit Page ‹ CareerSource Research Coast — WordPress
State of Jobs Conference - Snapchat Geofilters - All Documents
CareerSource Research Coast 26 469 New View Page Events UpdraftPlus
Howdy, Tonya Woodwoth
Screen Options Help
Dashboard
Posts
Events
Media
Pages
All Pages
Add New
Comments 469
Newsletter
Ninja Forms
Appearance
OptionTree
Plugins 21
Users
Tools
Settings
Custom Fields
SEO 3
CPT UI
Insights
Visual Form Builder
Wordfence
Collapse menu
WordPress 5.2.1 is available! Please update now.
Edit Page Add New
The Newsletter dedicated page does not contain the [newsletter] shortcode. Edit the page or review the main settings.
You have venues for which we don't have Geolocation information. Click here to generate it.
The Page "Events" uses the "/events" slug: the Events Calendar plugin will show its calendar in place of the page.
Edit the Page slug or edit Events settings.
RFP# 19-002-OSO One Stop Operator
Permalink: https://careersourcerc.com/rfp-19-002-oso-one-stop-operator/ Edit
Add Media Add Form Add Form
Visual Text
Paragraph
The Workforce Innovation and Opportunity Act (WIOA) sets forth a vision for the workforce development system to operate as a comprehensive, integrated, streamlined system that aligns with the needs of business and is a force in helping stimulate local economies. Therefore, under WIOA, the Career Centers are required to partner with a range of federally funded employment and training programs to promote the coordination of services on behalf of job seekers and businesses.
Inclusive in the requirements under WIOA is the necessity to competitively select a "one-stop operator" to support the implementation of services with the career center system locally. The One-Stop Operator may be a single entity or multiple entities working together to form a consortium operator. The Operator may be for profit, non-profit, private or public. CSRC requires, at a minimum, that the One-stop Operator must coordinate the service delivery of the required one-stop partners and service providers.
Word count: 219
Last edited by Tonya Woodwoth on May 8, 2019 at 2:03 pm
Publish
Save Draft Preview
Status: Draft Edit
Visibility: Public Edit
Revisions: 11 Browse
Publish on: Mar 28, 2019 @ 07:31 Edit
Readability: Needs improvement
SEO: Not available
Move to Trash Publish
Page Attributes
Parent
(no parent)
Template
veterans template 2
Order
0

Attachment F

CareerSource RESEARCH COAST

careersourcerc.com

MEMORANDUM

TO: Tonya Woodworth, Communications Manager

FROM: Glenda Harden, Senior Vice President of Operations

DATE: May 3, 2019

RE: Website Public Notice for RFP# 19-002-OSO

The deadline for the submission of the above RFP was yesterday, May 2, 2019 at 4:30 pm. Please remove this RFP from the website.

G Harden
Senior Vp Operations
5/3/2019

Attest:
Tonya Woodworth
Communications Manager
5/3/2019

info@careersourcerc.com
Administrative Office
584 NW University Boulevard, Suite 100 | Port SaintLucie, FL 34986
p: 866.482.4473 | f: 866.314.6580

a proud partner of the americanjobcenter

ADMINISTRATIVE PLAN

FOR THE WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST

D/B/A

"CAREERSOURCE RESEARCH COAST"

CareerSource RESEARCH COAST

ADMINISTRATIVE PLAN
ORIGINAL APPROVAL DATE: 3/27/2014
REVISION DATE: 2/18/2020

Table of Contents

I. DESCRIPTION OF THE ADMINISTRATIVE ENTITY AND SUBSTATE GRANTEE 4
A. Service Delivery Area/Substate Grantee: 4
B. Designated Administrative Entity and Grant Recipient: 4
C. Designated Substate Grantee: 4

II. FINANCIAL MANAGEMENT SYSTEMS 5
A. Financial Reporting: 5
B. Accounting Records: 5
C. Internal Controls and Procedures: 5
D. Payroll Procedures: 6
E. Leave Procedures: 7
F. Travel Procedures: 7
G. Budget Control Actual Expenditures vs. Budget: 7
H. Allowable Costs/Cost Principles/Prior Approval: 8
I. Program Income: 8
J. Source Documentation: 9
K. Cash Management/Cash Advances: 10
L. Fidelity Bonding: 10
M. Audits and Audit Resolution: 10
N. Debt Collection: 11

III. PROCUREMENT POLICIES AND PROCEDURES: 13
A. Purpose: 13
B. Recordkeeping: 13
C. Designated Contract Officials: 13
D. Code of Conduct: 13
E. Conflict of Interest: 14
F. Board of Directors Contracting Rules: 15
G. Rules Regarding Contracting with a Board Member: 15
H. Required Documentation: 17
I. Small Purchase Thresholds and Non-Competitive Procurements: 17
J. Ordering and Receipt of Purchased Goods and Services: 18
K. Items Requiring State Approval Prior to Purchase: 18
L. Special Purchasing Conditions: 18
M. Other Procedures 19
N. Bids and Formal Requests for Proposals 19

IV. PROPERTY MANAGEMENT: 26

V. RECORDS MANAGEMENT, NETWORK SECURITY AND CONFIDENTIALITY: 28
A. Records Management, Retention and Disposal: 28
B. Management Information System: 28
C. Terminals Connected to State System 28
D. Nondiscrimination Regulations: 28
E. Confidentiality and Security of Records: 28
F. Security and Intrusion Protection: 28

VI. GRIEVANCE PROCEDURES: 29
A. Customers/Clients: 29
B. Vendors/Service Providers/ Partners: 29
C. Staff: 29

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

VII. MONITORING, OVERSIGHT AND EVALUATION PLAN: 31
A. Internal Programmatic Monitoring Team: 31
B. Independent Monitoring Firm: 31
C. Corrective Action Plans and Follow-Up: 32
D. Technical Assistance and Guidance: 32
E. Review and Evaluation of staff and Service Providers: 32
F. Program Quality and Outcomes: 32
G. Deobligation of Funds and Cancellation of Contracts: 33

VIII. NONDISCRIMINATION AND EQUAL OPPORTUNITY COMPLIANCE: 34

IX. CERTIFICATION REGARDING DEBARMENT AND SUSPENSION 35

X. INTERLOCAL AGREEMENT AND MEMORANDUMS OF UNDERSTANDING: 36

XI. SARBANES-OXLEY ACT OF 2002: 37
A. Audit Committee 37
B. Certification of Monthly Financial Statements 37
C. Auditing Providers 37
D. Whistleblower Protection Policy 37

XII. CONTINUITY OF OPERATIONS/DISASTER PREPARATION & RECOVERY 39

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

I. DESCRIPTION OF THE ADMINISTRATIVE ENTITY AND SUB-STATE GRANTEE

G. Service Delivery Area/Sub-state Grantee:
The Local Workforce Development Area (LWDA20) service delivery area consists of Indian River, Martin and St. Lucie Counties on the eastern seaboard of Florida. The LWDA is located approximately 100 miles north of Miami and 250 miles south of Jacksonville, Florida.

H. Designated Administrative Entity and Grant Recipient:
The Workforce Development Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast (CSRC), a private non-profit 501 (c) (3) corporation, is the grant recipient and administrative entity in LWDA20. CSRC is responsible for oversight and management of the local workforce development system including Wagner Peyser programs, Supplemental Nutrition Assistance Program (SNAP), Re-Employment Assistance, Trade Adjustment Assistance (TAA) program, Workforce Innovation and Opportunity Act (WIOA) programs for adults, dislocated workers, youth and the Welfare Transition (WT) program for recipients of Temporary Assistance for Needy Families. CSRC utilizes federal workforce development funds to provide services to businesses and career seekers through a local Career Center system managed and operated by CSRC. Beginning on January 1, 2009, CSRC began providing direct services for all programs exclusive of the WIOA youth program.

I. Designated Sub-State Grantee:
In LWDA20, CSRC is the designated sub-state grantee. CSRC is responsible for the management and disbursement of WIOA and all other private, state and federal funds allocated to LWDA20.

THE REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK.

II. FINANCIAL MANAGEMENT SYSTEMS

CSRC assures that the financial system provides fiscal control and accounting procedures that are in accordance with Generally Accepted Accounting Principles (GAAP) as applied to governmental units. CSRC complies with OMB 2 CFR 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards and follows the fiscal management requirements codified by the United States Department of Labor at 29CFR 95.21(b). CSRC requires all fiscal procedures documented formally.

A. Financial Reporting:
To ensure observance of limitations and restrictions on specific resources, CSRC uses a computerized fund accounting system to track information on all sub grant and contract awards, obligations, unobligated balances, assets and liabilities. The financial statements are prepared using the accrual basis of accounting. Revenues are recorded when earned and expenses are recorded when a liability is incurred, regardless of the timing of the related cash flows.

The Chief Financial Officer (CFO) or designee prepares monthly state reports from information generated from the CSRC accounting system. Reports are submitted, via the Internet, through the State of Florida's automated financial reporting system, Subrecipient Enterprise Resource Application (SERA). On a monthly basis, the CFO or designee prepares a worksheet for each grant reconciling the financial statements with the information reported on the state reports.

B. Accounting Records:
CSRC uses Abila/MIP Nonprofit Series fund accounting software. As a multiple grant recipient, CSRC records revenue, expenditures, assets and liabilities in separate funds for each grant program. Revenues and expenditures use an eight-segment account coding system. Assets and liabilities only require the use of the first and third segments. The first segment identifies the Fund within which the transaction occurs. The second segment identifies the program year/contract period. The third segment identifies the general ledger account number. The fourth segment identifies the participant eligibility category. The fifth segment identifies the cost category. The sixth segment identifies contracts/sub grants. In addition, this segment provides detailed information on specific programs within a Fund. The seventh segment is for financial statement purposes and identifies transactions as unrestricted, temporarily restricted or permanently restricted. The eighth segment identifies the participant number.

Accounting records are supported by back up of computer records, as well as source documentation. These records are entered into the system as they occur. The accounting database is backed up daily and stored on CSRC's Storage Area Network (SAN) with a copy of the daily backup copied to a cloud-based storage solution for disaster recovery purposes, when needed.

C. Internal Controls and Procedures:
CSRC maintains effective control and accountability over all grant and sub grant assets. It provides adequate safeguards for all such property and assures that property is used solely for authorized purposes. Financial procedures and controls are monitored by the CSRC Executive Committee prior to being presented to the CSRC Board of Directors.

1. *Cash Receipts and Disbursements:*
When CSRC receives funds, the Facilities Manager or designee logs in all cash receipts (checks and/or cash) and date stamps funds received. The Finance Department designee picks up and signs for each cash receipt. Each check is immediately placed in a secure location to be stamped with a restrictive endorsement (For Deposit Only). The Finance Department designee copies the cash receipts (checks and/or cash) and prepares a deposit slip in duplicate. The Finance Department designee keeps copies of the cash receipts and duplicate deposit slips on file.

When the deposit has been made, the validated bank deposit receipt is given to the Finance Department designee and he/she attaches this to all other documentation in a file under his/her supervision pending receipt of the bank statement. The cash receipts log is reconciled to the bank statements monthly and verification of deposits is documented by the CFO. All deposits are made in a timely manner.

All disbursements are made in response to a voucher. Supporting documentation is required to be attached to each voucher. The CFO or designee certifies all vouchers and purchase orders for accuracy. The President/CEO or the Senior Vice President of Operations/COO approves all expenditures to ensure that they are allowable and appropriately recorded. Vouchers prepared for entities that could possibly use funds for lobbying require a notation on the check stub that states that funds are not to be used for lobbying purposes. The President/CEO or the Senior Vice President of Operations/COO approves all checks to vendors by signing the check stub attached to the voucher and the check register. Quarterly, the Board Treasurer reviews the system generated check registers and the check log worksheet to verify accountability of all checks.

Other controls in place include:

- All checks require two laser signatures.
- No checks payable to cash are written.
- Unused checks are kept under lock and key.
- Undelivered checks are kept under lock and key.
- System voided checks are properly documented through the system check spoilage feature. Original copies are attached to the check register for verification by reviewer. A corrected invoice is required for reissue. If appropriate, the CFO or designee will process a "stop payment."
- After each check run, the beginning and ending check numbers used are entered into the check log worksheet.

A contract, documenting payment terms and conditions, is generated for all service providers and sub-recipients. To receive payment for services rendered, the service provider submits an invoice with the appropriate documentation to the Finance Department. For cost reimbursement contracts with performance deliverables, the Program Performance & Compliance Analyst (PP&C) reviews the performance documentation for data validation and accuracy. Once confirmed, the PP&C Analyst forwards the package to the Senior Vice President of Operations/COO for final review and approval. Once approved, the invoice package is forwarded to the Finance Department. The Finance Department designee reviews the invoice, cost allocation and expenditures portion of the invoice to determine accuracy and appropriate expenditures. The invoice is submitted for payment. Accounts payable procedures are followed to process payment.

2. *Bank Reconciliations:*
Bank statements are obtained online monthly by the CFO. The CFO prepares the bank reconciliations using Abila/MIP Nonprofit Series fund accounting software.

Bank reconciliation includes but is not limited to:

- Accounting for the deposit of all checks received;
- Accounting for all check numbers used;
- Comparing bank statement with register verifying check number and amount;
- Review of online banking activity;
- Review of bank transfers;
- Review checks that are outstanding more than 90 days; and
- Determining if checks to be re-issued or voided.

D. Payroll Procedures:
CSRC uses Microix, an automated timesheet program that interfaces with Abila/MIP to track employee time and activities. Employees are required to record time on a daily basis by fund (grant) and activity codes. Bi-weekly, employees electronically submit their timesheet to their immediate manager/supervisor who reviews and validates the timesheet. Once validated, the manager/supervisor electronically approves thus authorizing the electronic transmittal of the timesheet to the Finance Department. A Finance Department designee reviews all timesheets for accuracy and completeness (regular hours, leave codes, fund/activity codes) and prepares a report summarizing regular and the various types of leave hours by employee.

The timesheets and this summary sheet are then routed to the President/CEO who reviews and signs the summary and timesheets as authorization for payment. In the event the President/CEO is not available, the Senior Vice President of Operations/COO will review and sign the summary sheet and timesheets in order to process payroll for that period.

Once the payroll has been approved for processing, a Finance Department designee will transfer the timesheet information from Microix to Abila/MIP. The HR module of Abila/MIP is used to automatically update the attendance and leave accrual records generated by the Microix time reporting module. The Finance Department designee who is processing payroll will verify that the total hours reported on the payroll reports agree with the payroll summary sheet and that the expenses and deductions appear properly. The CFO or designee then reviews and certifies the reports prior to generating checks or direct deposit vouchers.

Payment will be provided to the employee through electronic transfer to a designated financial institution. Manual checks may be written on a temporary basis only with the written request of the CFO and approval by the President/CEO.

The President/CEO or the Senior Vice President of Operations/COO will review all processed payroll documentation for accuracy and any adjustments necessary will be made in the next pay period. The CFO will then process all 401K employee contributions/employer matches for the pay period via an online secure web portal access to the financial institution.

Either a personnel action form (PAF) or other authorized document initiates a change to the payroll system. In the case of a salary increase, reduction or change in status, a PAF is prepared and signed by a Human Resources Department designee and authorized by the President/CEO or the Senior Vice President of Operations/COO (for staff changes) or by a member of the CSRC Executive Committee (for President/CEO changes only). Copies of these forms are kept in the employee's personnel file. Changes are entered using the HR module of Abila/MIP.

One file is maintained on each employee. A personnel file containing the employment application, assessment information, drug tests, original personnel action forms, disciplinary actions, goals, performance evaluations, recognitions, fringe benefit information, W-4's and I-9's is maintained by the Human Resources Department. The Human Resources Department office is under strict security access by means of hours of operation and allowable swipe card permission levels.

Employees may access and review their personnel files following procedures outlined in the Employee Handbook.

E. Leave Procedures:

Employees follow procedures outlined in the Employee Handbook when requesting leave. Leave time is recorded electronically using the Microix module and employees submit requests to their immediate manager/supervisor. Managers/supervisors review these requests and electronically approves or denies.

F. Travel Procedures:

Employees and Board of Directors are reimbursed for board-related travel that is deemed necessary and reasonable. In May 2010, the Florida Legislature passed proviso language requiring all local workforce development boards to comply with travel policies in accordance with Section 112.061, Florida Statutes. CSRC adheres to the Travel Manual (Attachment I).

G. Budget Control Actual Expenditures vs. Budget:

CSRC's fiscal year operational budget is produced annually by the CFO and submitted to the President/CEO. The budget is reviewed and approved by the CSRC Executive committee, ratified by the CSRC Board of Directors and then taken to the Treasure Coast Workforce Consortium for final approval. Once approved, the budget is submitted to the Department of Economic Opportunity (DEO).

Upon approval or modification of the budget, the CFO is responsible for maintaining, monitoring and reporting the budget information. CSRC's computerized fund accounting system produces monthly financial reports documenting expenditures and balances for each budget line item. These reports are prepared by the CFO and reviewed by the President/CEO and the Senior Vice President of Operations/COO. These reports are presented monthly to the CSRC Executive Committee and approved by the CSRC Board of Directors.

1. *Budget Transfer Authority:*
   The President/CEO has budget transfer authority between line items established within the approved operating budget. This limited authority would be applicable when transferring amounts of $10,000 or less. In instances where the transfer amount exceeds the threshold, the following processes are followed:

   - $10,001 to $15,000 may be transferred with the written approval of both the CSRC Chair and Vice Chair.
   - Transfer requests that exceed $15,000 require formal approval of the CSRC Executive Committee before initiating action.

   All transfers are documented along with the associated justification and made available for review upon request.

   Line item changes within categories can be made by the President/CEO with notice given to the CSRC Executive Committee at the next regularly scheduled meeting.

H. Allowable Costs/Cost Principles/Prior Approval:
CSRC complies with the cost principles defined in OMB 2 CFR 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards. As a part of the accounts payable function, the Finance Department adheres to the following basic standards before charging any cost to a grant, either as an indirect or direct cost:

- Be necessary and reasonable for proper and efficient performance and administration;
- Be allocable;
- Be authorized or not prohibited by state or local laws or regulations;
- Conform to any limitations or exclusions set forth in the Circulars, Federal laws, terms of the Federal awards or other governing regulations;
- Be consistent with policies, regulations and procedures;
- Be accorded consistent treatment;
- Be in accordance with generally accepted accounting principles (GAAP);
- Not be included as a cost or used to meet cost sharing or matching requirements of any other Federal award;
- Be net of all applicable credits;
- Be adequately documented.

The OMB guidance is followed when determining the cost items and administrative requirements that require prior approval. Annually, the CFO will submit the Cost Allocation Plan to DEO. For the items that require prior approval, the CFO will follow DEO guidance and complete the appropriate forms prior to incurring any of these costs.

I. Program Income:
Program income consists of interest earned on federal funds received and receipts from goods or services provided as a result of activities funded by federal grants, as well as funds provided to a service provider that are in excess of the costs associated with the services provided. Program income may be retained only if such income is used to carry out the program. CSRC maintains records sufficient to determine the amount of such income received and the purposes for which such income is expended. Program income may not be used to pay disallowed costs.

Should any program income result from the performance of federally funded contracts by not-for-profit service providers, it is the policy of CSRC that these funds be used for the program that generated the income, or for similarly funded programs (CFDA cluster) or returned to CSRC at CSRC's discretion.

Program/grant funds are separately maintained in the accounting records even though they are deposited into a pooled cash account. Balances per fund are calculated on a weekly basis. Interest earned each month on this pooled account is allocated annually to each fund based on its average monthly balance. CSRC uses the deduction method of reporting program income for those grants that allow the use of program income. For those funds (TANF, RA/UC, etc.) that require the return of interest earnings, an amount in excess of $500 for the year is returned to DEO.

J. Source Documentation:

All financial activity is maintained by a data processing system and supported by source documentation. A separate file is kept for service providers and vendors.

These files contain copies of invoices, checks, contracts and any other source documents that are required to permit preparation of reports and the tracking of funds. Only the Finance Department has access to computerized records through password security. Computerized financial records are backed-up as is outlined in Section II, B – Accounting Records. All financial records are retained according to the following record retention schedule. The only exception is if any litigation, claim, or audit is started before the expiration of the retention period. The records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken.

RECORDS	RETENTION PERIOD
Audits: Independent	10 fiscal years
Audits: Supporting Documentation	3 fiscal years
Budget Records: Approved Annual Budget	Permanent/Board Minutes
Budget Records: Supporting Documents	3 fiscal years
Certified Forward Documents	3 fiscal years
Chart of Accounts	Permanent
Correspondence: General	3 fiscal years
Cost Allocation Plans	5 years from last date effective
Financial Statements: Internal Reports	3 fiscal years
Financial Records and Supporting Documents	5 fiscal years from final audit
Fixed Asset Listing	3 years after final disposition
General Ledger: Annual Summary	Permanent
General Ledger: Year-end Closing Records	10 fiscal years
Grant Files	5 fiscal years after completion
Insurance Policies and Claims	5 years after final disposition or expiration
Leases	5 years after completion or termination
Leases: Real Property	15 years after completion or termination
Monitoring: Internal	5 fiscal years
Monitoring: State/Federal	10 fiscal years
Payroll Records/Registers	5 years from final audit
Payroll Tax Returns/Forms	5 years from final audit
Personnel Records/Files	25 years after separation or termination
Property Inventory Records	3 fiscal years
Tax Filings and Related Correspondence	10 years from resolution

CSRC and CSRC's service providers, when applicable, maintain all participant files in a secure filing system that protects them. Files must contain all supporting documents related to eligibility, counseling, payroll data, employer reimbursements, evaluations and any other data pertaining to the participant's progress in the program and financial information related to that progress. Information must be sufficient for the preparation of reports required by federal grants administered by CSRC to permit the tracking of funds to a level of expenditures adequate to ensure that the funds have not been spent unlawfully.

CSRC and CSRC's service providers, when applicable, retain participant records. Eligibility information collected as part of the application process must be retained for at least one year following the date of application for those applicants determined ineligible for the program. Records of applicants who become participants are retained for five years from the date the participant exits the program.

CSRC's policies on documentation, record maintenance and record retention by service providers are included in all service provider contracts when a service provider contract is in effect. Adherence to these policies is monitored on a regularly scheduled basis by CSRC employees when a service provider contract is in effect.

K. Cash Management/Cash Advances:

CSRC's primary cash receipts are warrants directly deposited into the Cash – Business Checking Account by the State of Florida through electronic funds transfer as cash advances from the various funding sources CSRC receives. Cash advance requests from the State of Florida are done as needed using the State of Florida's OSMIS system. Procedures are in place to receive, disburse and manage cash advances. Cash balances on hand are minimized and the forecasting of cash requirements closely coincides with the actual disbursements of funds. A Finance Department designee prepares a cash request worksheet each week prior to the deadline for cash draws. The cash balance of each fund is verified and reconciled to the general ledger. Invoices that are projected to be paid within the next week are recorded by vendor and fund/grant on this spreadsheet. The projected cash disbursements per fund are then deducted from the current cash balances per fund. Cash advances from the previous week that have not yet been received are added to the appropriate cash balances. Monthly Cost Pool allocations are estimated each week in order to reflect weekly disbursements. Based on the cash needs of each fund, the CFO or designee determines the amount of cash to be requested for that week. The request is entered into the SERA system and a copy of that request is attached to the worksheet which is reviewed and approved by the President/CEO or the Senior Vice President of Operations/ COO. The cash request spreadsheet is reviewed by a Finance Department designee the following week, who verifies that the cash has been received or records a receivable on the spreadsheet for funds requested but not received.

L. Fidelity Bonding:

All employees of CSRC are bonded for faithful and honest performance. Employees whose responsibilities include handling of warrants and/or who have access to cash are bonded for amounts sufficient to cover potential losses. Background checks are completed on each new potential employee. Potential employees with violations posing a high risk to the performance of their duties are not considered.

CSRC advances funds to service providers and vendors, as appropriate and necessary. All service providers acting on behalf of CSRC by receiving or depositing cash advances into program accounts or in issuing financial documents, checks or other instruments of payment for program costs are bonded to provide protection against loss.

Records pertaining to fidelity bonds are maintained by the Finance Department.

M. Audits and Audit Resolution:

As a private, non-profit organization, CSRC complies with the WIOA, OMB 2 CFR 200, the most current state policy and all other federal and state regulations pertaining to the auditing of federal funds, the procurement of those audits and the resolution of audit findings.

Within 30 days after receiving a completed audit, CSRC transmits three copies of the audit report along with any corrective action plans necessary to DEO. Within 60 days of receiving a completed report, CSRC submits an audit resolution report detailing all corrective actions taken.

CSRC utilizes a formal competitive Request for Qualifications (RFQ) for obtaining auditors. CSRC must complete this RFQ process every five (5) years. The RFQ is sent to a minimum of three independent auditing firms. The RFQ cites the specific audit requirements, evaluation criteria, proposal provisions and any other necessary information. A copy of the proposers' most recent peer review, the qualifications for the auditors, disclosure of disciplinary action taken by the State Board of Accountancy within the last three years and references are also requested. The CSRC rating team reviews and ranks responses in order of qualifications and recommends a contractor from among the proposers. The CSRC rating teams recommendation is reviewed and approved by the Executive Committee's and approved by the CSRC Board of Directors.

Non-federal, non-profit service providers expending $750,000 or more annually in federal awards are required to have an organization-wide Single Audit conducted in accordance with OMB 2 CFR 200.

Non-federal, commercial (for profit) service providers expending $750,000 or more in a fiscal year in federal awards shall have either an organization-wide audit that includes coverage of federal contracts within its scope or a program specific annual independent financial and compliance audit conducted and prepared in accordance with Generally Accepted Government Auditing Standards (GAGAS).

Non-federal service providers expending less than $750,000 in a fiscal year in federal awards are exempt from federal audit requirements for that year. Records must be available for review or audit by appropriate officials of the federal agency, pass-through entity, and Government Accountability Office (GAO).

Audit costs can only be charged to federal grants if related to the performance of a Single Audit or if the non-federal entity does not currently have any federal funding and the audit cost is in the indirect cost pool for a cost allocation plan or indirect cost proposal.

A copy of the audit is to be furnished to the CSRC Board of Directors within nine (9) months and/or 30 days of receipt, whichever is sooner from the end of their year-end or 30 days of receipt, whichever is earlier. Results of the audits are forwarded to the appropriate state authority in a timely manner.

In the event a service provider should go out of business, CSRC must be notified immediately. CSRC then becomes the designated custodian of all federal program related records and must be notified of the designated custodian of the service provider's other records.

When CSRC is notified that a service provider is going out of business and the service provider has expended $750,000 or more of federal funds, CSRC will notify its audit firm to do an immediate audit of the service provider in accordance with 2 CFR 200 or GAGAS. If the service provider has received less than the designated monetary thresholds, CSRC will do an immediate audit of the service provider. This policy is added to all service provider contracts initiated by CSRC.

CSRC accepts responsibility for resolving audit findings locally and has established procedures for the CSRC Board of Directors review and resolution of service providers audit reports. These procedures include a review of audit reports to ensure the requirements of OMB guidance and state policies are met. All findings and recommendation reports are reviewed by the President/CEO. The proper actions in response to the findings and recommendations are determined and all actions needed to correct or otherwise resolve findings are completed within established timeframes as outlined in the procedures noted in this section and under "Debt Collection."

CSRC's auditing and resolution procedures include issuance of a written determination that states:

- whether or not there are findings to be resolved;
- whether or not questioned costs are allowed;
- whether or not corrective actions for administrative findings are adequate; and
- that all findings are subject to state and federal review.

These procedures also establish a debt, if applicable, and provide repayment options and appeal rights for the service provider. (See Section N: Debt Collection)

When there are no findings to be resolved, it is so indicated in the audit report and a copy of which is forwarded to the service provider under a cover letter. The audit file is then considered closed.

N. Debt Collection:

If an audit determination or other indication finds that a wrongful expenditure of funds exists, prompt and appropriate corrective action will be taken. Notice and an opportunity for a fair hearing will be granted. Upon determination that the wrongful expenditure of funds was due to willful disregard of the state or federal rules and regulations, gross negligence, or failure to observe accepted standards of administration, the service provider, as appropriate, shall be liable to repay such amounts from funds other than those received under all federal awards. These procedures also apply when a wrongful expenditure of funds is discovered through means other than an audit (such as a monitoring review, Inspector General review, etc.).

CSRC will attempt to collect debts from service providers through informal requests (phone, letters, and personal contact). If this is not productive, formal debt collection through the courts will be pursued if appropriate.

Repayment of debt must be made in cash (money order or cashier's check), unless prior approval of another method of repayment has been requested by CSRC and an official response obtained from DEO.

The CSRC Executive Committee serves as the hearing board for all complaints or grievances arising from audit findings, disallowed costs and investigations or monitoring reports.

All affected parties may request, in writing, a hearing before the CSRC Executive Committee. On more serious offenses, the CSRC Executive Committee may request an appearance by the appropriate parties. Hearings on any grievance are conducted within 30 days of the filing of the grievance and a decision within 60 days of the filing date. All decisions are final.

THE REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK.

III. PROCUREMENT POLICIES AND PROCEDURES:

A. Purpose:
To ensure the purchase of goods and services is conducted in an open manner with competitive pricing, proper management, and oversight controls to ensure Finance accountability and efficiency and to prevent waste, fraud, abuse and avoid acquisition of unnecessary or duplicative items.

The President/CEO is authorized by the CSRC Board of Directors to enter into contracts and agreements financially obligating CSRC provided the obligation is consistent with the current CSRC Board of Directors approved budget, CSRC's plans, or other documents governing CSRC's strategic direction, and the total contract is less than $100,000. The President/CEO may designate the Senior President/COO or Vice President(s) as the approving authority/designee. Contracts for $100,000 or more require approval by a majority vote of the CSRC Board of Directors.

The President/CEO, or the President/CEO's designee, has approval authority over all purchases and contractual commitments and makes the final determination on any proposed purchases where budgetary or other conditions may result in denial.

Authorized staff members (purchasing agents) have the authority to initiate purchases on behalf of their departments within the guidelines described below. The President/CEO or authorized designee is responsible for notifying the Finance Department of all individuals authorized to initiate purchases or prepare purchase orders. The Finance Department maintains a list of all authorized purchasing agents.

B. Recordkeeping:
CSRC will maintain a history of the procurement. Records will include mailing lists, the rationale for the method of procurement, the selection process, responses, solicitations, contract type, communications including rejection notices, the basis for the agreement price and the selection or rejection of the award and any other pertinent information. Documents may be attached to the purchase authorization/summary memo or the procurement file as appropriate. All records shall be maintained for a period of five years following final payment and closure of all pending matters (or longer, if required by applicable law).

C. Designated Contract Officials:
The CSRC Board of Directors approves all service provider contracts. The CSRC Board of Directors authorizes the President/CEO to sign service provider contracts, contract modifications and terminate contracts on behalf of the CSRC Board of Directors after the Board of Directors has approved issuance of the contract or the need for termination. The President/CEO may authorize a designee. The decision to execute or terminate a service provider contract originates with the CSRC Board of Directors.

Other contracts, less than $100,000, for goods and services, may be initiated by employees (purchasing agents) and are approved by the President/CEO or authorized designee, provided the cost for the items or services is included in the CSRC Board of Directors approved budget.

D. Code of Conduct:
CSRC has established ethical standards for employees engaged in the award and administration of service provider contracts. These standards involve personal standards of conduct and fair and equitable treatment of service providers and potential service providers. Employees are expected to carry out their responsibilities related to procurement with complete impartiality and without preferential treatment of anyone. CSRC's standards include the following:

1. *Confidentiality*
All CSRC Employees/Board of Directors are to observe rules of confidentiality during the procurement process, the negotiation and award phase and the post-award of the service provider contract. These rules include not disclosing (1) the number and names of proposers until the contract is awarded or the discussion is made public, (2) technical or cost/price information that is submitted by proposers or gathered as evaluation criteria, and (3) fund availability until that information is known to all proposers.

2. *Disclosure*
Information must be given to all proposers and potential proposers equally. The requirements and release of solicitations are made public through legal advertising and is not prematurely divulged to favorable sources. The rating criteria used to evaluate proposals is provided in advance to all potential proposers. Information provided to one proposer is shared with all other known potential proposers when the information is not contained in the request for proposals.

3. *Fairness and Impartiality*
To ensure fairness and impartiality to all proposers, specifications in the request for proposal are stated in generic terms avoiding unduly restrictive requirements. Requests for Proposals (RFP) are reviewed for terms and conditions that appear to be restrictive prior to the RFP being issued. All CSRC Employees/Board of Directors engaged in the review of proposals and/or the award of a contract are expected to abide by CSRC's Code of Ethics, specifically the Conflict of Interest standards, and to withdraw from the process if they cannot review the proposal, negotiate the contract or award the contract without total impartiality and fairness.

During the purchase of goods and general services, CSRC uses the following ethical conduct standards:

- Employees discourage the offer of and decline individual gifts or gratuities of value in any way that might influence the purchase of supplies, equipment, and/or services.
- Employees notify his/her immediate supervisor if he/she is offered a gift.
- No CSRC Board Member, Officer or Director, Employee or Agent for CSRC participates in the selection or administration of a vendor if a real, or apparent, conflict of interest is involved. (See Section E -Conflict of Interest)
- CSRC Board Member, Officer or Director, Employee and Agents for CSRC, neither solicit nor accept gratuities.

E. Conflict of Interest:
CSRC has a conflict of interest policy that governs the participation of CSRC Employees/Board of Directors, either directly or indirectly, in the procurement process. This policy requires CSRC Employees/Board of Directors to withdraw from the procurement process if there is any apparent or perceived conflict of interest connected with their involvement in the procurement process. CSRC's conflict of interest policy states that:

- A CSRC Board of Director shall not cast a vote on, nor participate in, any decision-making capacity on the provision of services by such member (or any organization which that member directly represents), nor on any matter which would provide any direct financial benefit to him/her.

- Neither membership on the CSRC Board of Directors nor the receipt of WIOA funds to provide training and related services shall be construed, by themselves, to violate the state and federal rules and regulations.

- The officers, employees, or agents of the agency making the award will neither solicit nor accept gratuities or anything of monetary value from contractors, potential contractors, or parties to sub-agreements.

- CSRC Employees/Board of Directors involved in the rating of proposals are required to sign a certification indicating they have no conflict of interest or privileged information regarding the proposer and that they will not be enriched by the contract.

F. CSRC Contracting Rules:
In accordance with CareerSource Florida Inc., *State and Local Workforce Development Board Contracting Conflict of Interest Policy* (*May 2012*), CSRC will not enter into a contract with one of its own CSRC Board of Directors, with an organization represented by its own membership or with any entity where a CSRC Board member has any relationship with the contracting vendor/sub-recipient.

At CSRC's discretion, the following may be exempted from the above paragraph:

- Contracts with an agency (as defined in Florida Statute 112.312[2], Florida Statutes;
- Contract relating to a CSRC Board member's appointment to the CSRC Board of Directors under section 101(a)(2), Public Law No. 113-128, ("WIOA");
- A contract with a CSRC Board member receiving a grant for workforce services under federal, state or other governmental workforce programs;
- A contract between CSRC Board of Directors and a CSRC Board member, which is not exempted under bullets above where the board documents exceptional circumstances and/or need, and the CSRC Board member does not personally benefit financially from the contract. Based upon criteria developed by CareerSource Florida Inc., DEO shall review CSRC's documentation and assure compliance.

  Each contract which is exempted from the general prohibition in the paragraph above must meet the requirements set forth in the section below (Rules Regarding Contracting with CSRC Board of Directors), including, but not limited to, the requirements of the WIOA "conflict of interest" provisions.

G. Rules Regarding Contracting with a CSRC Board member:

1. *Definitions:*

   - *"has any relationship with the contracting vendor"* means the director is an owner or a principal of the vendor, or a principal of the vendor has retained the director, or the parent organization or subsidiary of a corporate principal of the vendor has retained the director or a director's known relative or director's business associate is an owner of the vendor. For purposes of this policy, vendor, contractor and sub-recipient are the same.

   - *"benefit financially from a contract"* means the special private financial gain to a director, a special private financial gain to any principal which retains the director, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the director or the special private financial gain to any director's relative or business associate or to a CSRC employee or a CSRC employee's relative and such benefit is not remote or speculative. "Personally benefit financially" means a special private financial gain to a director only.

   Additional definitions are in Part I (Definitions) of CareerSource Florida Inc., *State and Local Workforce Development Board Contracting Conflict of Interest Policy* (*May 2012*).

   CSRC must comply with all requirements of section 445.007, Florida Statutes, prior to contracting with a CSRC Board member or other person or entity that could benefit financially from a contract (as defined above). These requirements are:

   - All contracts between CSRC and a CSRC Board member or other person or entity who may benefit financially from a contract (as defined above) must be approved by a two-thirds vote of the CSRC Board of Directors present, once a quorum has been established, and the approval of such contracts shall not be delegated to staff or committees. The CSRC Board member who abstains from voting due to conflict of interest will not be counted towards the quorum.

- The fact that a CSRC Board member or other person or entity could benefit financially from the contract (as defined in the policy) must be disclosed in the meeting, and made part of the minutes of the meeting before the vote is taken. The CSRC Board member's absence from the meeting does not relieve CSRC from the disclosure and two-thirds vote requirements. All other known conflicts must be disclosed before the vote. If a CSRC Board member or CSRC employee discovers a conflict of interest after the vote, then the conflict must be disclosed in a procedure consistent with section 112.3143(4)(b), Florida Statutes. CSRC Board of Directors who could benefit financially from the contract or who have any relationship with the contracting vendor (as defined in the policy) must abstain from voting on the contract. A CSRC Board of Director's designee cannot vote in the place of a CSRC Board of Director who is required to abstain.

- CSRC contracts (i.e., contracts with CSRC Board of Directors) equal to or greater than $25,000 shall not be executed prior to the written approval of CareerSource Florida Inc.

- CareerSource Florida Inc. must submit all contracts equal to or greater than $25,000 with CSRC Board of Directors or other persons or entities that could benefit financially from the contract to DEO along with documentation, as specified by the policy, demonstrating compliance with section 445.007, Florida Statutes.

- A contract under $25,000 between CSRC and a Board member of CSRC or between a relative of a CSRC Board member or of an employee of CSRC is not required to have the prior approval of CareerSource Florida Inc. but must be approved by a two-thirds vote of the CSRC Board of Directors present, once a quorum has been established and after full disclosure with the Board member's abstention and must be reported to DEO and CareerSource Florida Inc., within 30 days after approval.

- Contracts with a CSRC Board member or other persons or entities that could benefit financially from the contract (as defined the policy) in which CSRC is receiving monies or other compensation (such as a CSRC Board member paying rent to CSRC or paying for CSRC services) are exempt from this policy.

- The term "contract" includes the initial contract and all amendments, renewals, or extensions. Renewals or extensions of contracts with CSRC Board members or persons or entities that could benefit financially from the contract must be approved under the same procedure as if the renewal or extension were an original contract. Any amendments to a contract which could benefit financially a CSRC Board member or another person or entity (as defined in the policy) must be approved under the same procedure as if the amendment were an original contract. Any amendments which do not benefit financially a CSRC Board member or other person or entity (as defined the policy) may be approved by a regular majority vote where there is a quorum according to CSRC rules and/or bylaws.

- All other requirements of section 445.007(1) must be met. For example, a CSRC Board member must continue to disclose any conflict of interest in a manner that is consistent with the procedures outlined in section 112.3143, Florida Statutes.

- In order to comply with the requirements of section 445.007, CSRC shall advise and require CSRC Board of Directors to disclose known conflicts of interest and notify CSRC of any contracts which may benefit them personally. In order to comply with the requirements of section 445.007, CSRC shall advise and require all parties to a contract to disclose all known conflicts of interest and notify CSRC of all CSRC Board of Directors or other persons or entities known to benefit financially from the contract (as defined the policy).

- A contract which is initially subject to the requirements of section 445.007 due to a CSRC Board member's, a CSRC employee's or another person's or an entity's conflicts of interest at the time of approving the contract is not subject to these procedures after the departure of the CSRC Board member from the membership, the departure of the employee from CSRC's employ or other actions have removed the conflicts of interest.

- The above requirements do not eliminate or diminish CSRC's obligations to comply with Public Law 113-128 ("WIOA") "Conflict of Interest" procedures and 20 CFR 683.200.

H. Required Documentation:
For each contract equal to or greater than $25,000, CSRC must electronically submit after the approval of the contract a completed contract information form certified by the CSRC Board of Director's Chairperson as correct and true to workforcecontract.review@deo.myflorida.com containing the following information:

- Identification of all parties to the contract;
- Description of goods and services to be procured;
- Value of the contract, contract renewal or contract extension;
- Contract term;
- Contract number or identifying information, if any;
- Identification of board member or employee whose conflict of interest required the CSRC Board of Directors approval of the contract by 2/3 vote;
- The nature of the conflict of interest in the contract;
- A certified board membership roster listing all members on the Board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting and for those in attendance, the affirmative and negative votes and abstentions for each Board member;
- Dated and executed conflict of interest forms, which are consistent with the procedures outlined in section 112.3143, Florida Statutes, submitted at or before the CSRC Board of Directors meeting, for CSRC Board members who have any relationship with the contracting vendor (as defined the Contract Guidance); and
- Other information as specified on the contract information form.

I. Small Purchase Thresholds and Non-Competitive Procurements:
Purchasing procedures outlined in this section pertain to the procurement of goods and services costing less than $100,000. A cost/price analysis must be performed in connection with every procurement in excess of the Simplified Acquisition Threshold specified in OMB memorandum M-18-18. Cost/price analyses will help ensure that:

- Public funds are spent economically and the cost is reasonable;
- The funds expended are appropriate in relation to the need for the service; and
- Vendors provided the best services at the most favorable prices.

Where appropriate, an analysis is made of lease and purchase alternatives to determine which would be the most economical and practical procurement.

The purchasing of materials, supplies, equipment and services costing less than $100,000 are categorized and processed according to three categories of cost. The purchase of items and services costing $10,000 or less (Micro-purchases) are initiated by a purchasing agent and reviewed and approved or denied by the President/CEO or Senior Vice President of Operations/COO. Items and services within this cost category may be awarded without soliciting competitive quotations if CSRC considers the price reasonable. To the extent practicable, the micro-purchases will be distributed equitably among qualified suppliers.

A "Purchase Authorization" form is to be completed. The "Purchase Authorization" form provides the justification and benefit of the purchase along with a cost comparison analysis, if applicable. Ordinary and routine purchases for CRSC owned vehicles, reasonable repair and maintenance supplies and purchases under $500 made by authorized purchasing agents will not require a "Purchase Authorization" form when paid on a company credit card. Credit card purchases under $500 made by Authorized purchasing agents which do not require a Purchase Authorization Justification Form, require prior written approval from the President/CEO, which can include approval via email. Only at the request of the vendor, will a Purchase Order be issued. If approved, the purchasing agent processes the order for the item or service, signs the invoice when the service is completed or when the item has been delivered and submits the invoice, along with the original "Purchase Authorization" if required, and supporting documents, to the Finance Department.

Items and services costing $10,000.01 to $15,000 are initiated in the same manner as outlined above. Items and services within this cost category require the purchasing agent to obtain three telephone, written or Internet quotes.

For services, supplies or other property costing more than $15,000 but less than $100,000.00, three written quotes are required and purchases are initiated in the same manner as outlined above.

J. Ordering and Receipt of Purchased Goods and Services:
The Facilities manager signs off on delivery of packages and supplies. The employee who requested the good or service verifies the receipt of the items, as well as signs and dates the packing slip. Any goods and services for multiple locations are signed off as received by those personnel authorized to receive such goods and services. Discrepancies in ordered merchandise (short delivery/returned items) must be recorded on the packing slip and followed up with the vendor. All discrepancies will be documented prior to the invoice being forwarded to the Finance Department for payment. Finance Department designee will compare the (description, unit price, quantity) on the packing slip to the invoice received. Vendor statements will be analyzed monthly to ensure that all credits have been recorded by CSRC and the Vendor.

K. Items Requiring State Approval Prior to Purchase:
When required, the Finance Department will submit a request to the DEO to purchase items requiring prior grantor approval in accordance with 2 CFR 200 on the appropriate form pursuant to DEO Policy Number 87 (Prior Approval Administrative Policy for local workforce development boards). For the remaining items that require prior approval and which are not on the annual form, CSRC will complete and submit to DEO "Prior Approval Request Form / Other Individual Items" prior to incurring expenditures. The request for approval must be followed by an appropriate procurement.

L. Special Purchasing Conditions:

1. *Noncompetitive Proposal/Sole Source:*
Noncompetitive proposal/sole source may be used when the award of the contract under competitive negotiation or small purchase procedures is not feasible.

In general, purchases will be awarded under noncompetitive negotiations only when it is appropriate, necessary and in the best interests of CSRC.

Circumstances under which a contract may be awarded by noncompetitive negotiations are limited to the following: (1) the goods or services to be procured are available only from a single source; (2) organizational exigency or emergency where the urgency for the purchase will not permit the additional time needed for competitive solicitation; or (3) after solicitation of various sources, CSRC determines competition is inadequate.

A failure to properly plan for procurement is not an emergency under these rules.

In the event of an exigency or emergency, a competitive procurement must be initiated within two years after the purchase or procurement. In other instances, where sole-source procurement was used for a purchase, an attempt to solicit the goods or services through competitive procurement must be initiated within three years after the procurement.

Utilizing the "Purchase Authorization Form" details sole source required information. These purchases require verbal consent from the President/CEO, or in the absence of the President/CEO or the Senior Vice President of Operations/COO. The circumstances surrounding such a purchase must be documented in writing, after the fact, and all parties involved in the decision to purchase must sign the document. The document will be stored by the Finance Department with the paid invoice.

2. *Exempt Purchases:*
Purchases made with unrestricted funds are exempt from the procurement procedures.

3. *Routine Purchases:*
An annual price analysis to document reasonableness may be conducted for goods and services ordered on an ongoing basis. In lieu of a price comparison for each purchase, an annual price analysis will be prepared for goods and services purchased on a regular basis to operate the organization. An annual estimate will be made of the value of the items to be ordered, and the proper procurement in accordance with the above policies will be completed based upon the aggregate amount estimated to be necessary.

Purchases made based upon prices established by a state contract administered by the State of Florida Department of Management Services (DMS), will not require further procurement actions. When making a purchase based upon a price established by a state contract, the contract number, year and title will be noted on the documents maintained for the CSRC procurement file.

Purchases made based upon a procurement made by another unit of local government, or a public entity established by law, such as (among others): Early Learning Coalitions, other LWDB's, DEO or the State of Florida, will not require further procurement actions because these bodies are subject to the same or similar procurement requirements as CSRC. When making a purchase based upon such procurement, a copy of the procurement should be attached to the purchase requisition or the procurement file for that item as appropriate. If the item was a sole-source procurement, CSRC may not rely on the procurement unless it meets the noncompetitive proposal/sole source requirements described above. CSRC may use this method provided the body has followed the same or similar procurement guidelines as CSRC and can provide appropriate backup documentation.

M. Other Procedures

When possible, CSRC may enter into state and local intergovernmental agreements where appropriate for procurement or use of common or shared goods and services and may use Federal excess and surplus property in lieu of purchasing new equipment and property.

All procurement contracts and other transactions between CSRC and units of state and local governments using WIOA funds must be conducted only on a cost reimbursement basis. No provision for profit is allowed. Any excess of revenue over costs incurred for services provided by a governmental or non-profit entity must be included in program income.

CSRC will negotiate as a separate element of the price for each contract in which there is no price competition and in all cases where cost analysis is performed. Costs or prices based on estimated costs for contracts are negotiated using the Federal cost principles.

The cost plus a percentage of cost or percentage of construction costs methods of contracting shall not be used.

For fixed amount sub awards prior approval from DEO will be obtained. Payments will be based on meeting specific requirements of the federal award and accountability is based on performance and results. The award amount will be negotiated using the cost principles as the guide. CSRC will use cost, historical cost, or unit pricing data to establish the fixed amount award with assurance the sub-recipient will realize no increment above actual cost. If the award is terminated before the completion of the project, the award amount will be adjusted. The sub-recipient will certify in writing to CSRC at the end of the award that the project or activity was completed or the level of effort was expended. Prior written approval is required by the sub-recipient for changes in project leader or scope of effort.

Awards will not be made to a debarred or suspended party. This is required to be verified for all sub-recipient contracts and for vendor contracts greater than or equal to $25,000, or procurements of federally-required audit services in any amount.

N. Formal Requests for Proposals (RFPs)

Goods and services costing more than $100,000 can only be purchased through competitive proposal procedures. These formal procurement processes requiring the development of a RFP, review and/or rating of proposals and the awarding of a contract. Once a contract is awarded, a copy of the contract is routed to the Finance Department along with a purchase order for the item or service being ordered. Once the work is completed or the item received, the invoice for payment is signed by the staff person receiving the item or service and routed to the Finance Department. A Finance Department designee prepares a voucher, attaches all documentation and routes the package to the President/CEO or authorized designee for approval. Once approved, a Finance Department designee issues payment.

The formal procurement process requiring a proposal is initiated by CSRC employees or CSRC Board of Directors who identify a need. Costs are researched (cost estimate) immediately to determine the approximate market cost of the service, supply or property; and leasing, if appropriate, versus procurement is investigated. The cost estimate

is documented in writing. If procurement is the best choice and the anticipated cost exceeds $100,000 a written solicitation for a proposal is prepared. At a minimum, this request includes:

- general information;
- applicable laws and rules;
- proposal instructions;

- clear and accurate descriptions of the goods or services being procured. The description must not contain features that restrict competition;
- All requirements that must be fulfilled and all other factors used in evaluating bids or proposals;
- Technical requirements described in terms of functions to be performed or performance required, including a range of acceptable or minimum acceptable standards;
- Specific features of —brand-name or equal descriptions, if included in the solicitation;
- If procuring goods or certain types of services, the acceptability of metric measurements;
- Preference for ecologically sound and energy-efficient products**;**
- a disclaimer stating CSRC is not obligated to make an award and all bids may be rejected; and
- Federally required Contract Provisions, Certifications and assurances

Competitive RFPs are developed according to established procedures approved by the CSRC Board of Directors. The President/CEO or authorized designee monitors procedures to ensure they are followed when procuring service providers. To avoid unnecessary duplications, a RFP may not be initiated without the President/CEO's approval. The CSRC Board of Directors approves all RFPs. The final selection of a service provider rests with the CSRC Board of Directors.

The following procedure is the official process for development, issuance and finalization of RFPs for programs and participant services:

- A draft RFP is prepared, incorporating all applicable requirements established by CSRC policy. At a minimum, the RFP includes a clear and accurate description of the technical requirements for the service to be procured, all requirements to be fulfilled by the proposer, and all other factors to be used in evaluating proposals. The relative importance of price is stated in the solicitation.
- Draft RFPs are presented to all appropriate CSRC committee(s) or the CSRC Board of Directors. The committee/CSRC Board of Directors review, discuss and approve the need for procurement and the terms of the RFP.
- If approved by any/all CSRC committee(s), the recommendation is forwarded to the CSRC Board of Directors. In the event the CSRC Board of Directors does not meet within a reasonable timeframe that would allow timely issuance of the RFP, the CSRC Executive Committee is empowered to act for the CSRC Board of Directors.
- Employees finalize the RFP incorporating all changes and recommendations approved by the CSRC Board of Directors.

Public advertisements are placed on the CSRC's website. When it is advantageous to stimulate greater competition among proposers, advertisements may be placed in publications serving a greater geographical region. Announcements of RFP's are communicated to potential service providers contained on the CSRC's service provider list and those organizations, which employees and/or CSRC Board of Directors believe may be potential providers who may not be contained on the inventory of potential service providers.

CSRC will ensure all prequalified lists of persons, firms, or products which are used are current and potential bidders will not be precluded from qualifying during the solicitation period.

Proposals received in response to the RFP are logged in with the date and time of receipt. Proposers are requested to send proposals sealed and they remain sealed until opened by designated staff. If fewer than three responses are received, and there is sufficient time before the good or service is needed, CSRC may attempt to obtain additional responses. After a public solicitation, if only one bid is received, it will be evaluated under the rules governing sole source purchases and a cost analysis performed.

Proposals are opened by at least two staff members who certify the proposal opening with their signatures.

Proposals are then routed to CSRC employees and/or CSRC Directors designated by the President/CEO and/or the CSRC Board of Director's Chairperson to be members of the rating team. Each rater receives copies of the proposal, the rating sheet and any other evaluative or historical information pertaining to the service provider or the procurement.

Proposals are rated first individually by each rater. At a specified meeting, all raters present and discuss their evaluation of the proposals and all proposals are ranked according to average scores.

The CSRC committee(s), who originally reviewed the RFP hears the rating team's recommendations, selects a potential service provider and sends that recommendation to the CSRC Board of Directors. The recommendation includes documentation of need, specific procedures to meet the need, time limits for the service, competencies/benchmarks established, the reasonableness of cost and the type of contract recommended. The CSRC Board of Directors review all recommendations and evaluations and vote for approval or rejection.

If approved, CSRC employees negotiate the terms of a contract and prepare the contract, either cost reimbursement or fixed price, for signature. Contracts may be signed by the President/CEO or authorized designee.

Once all necessary signatures and documentation are obtained, the contract is considered to be fully executed and the service provider is free to begin the work outlined in the contract.

1. *Selection of Contract Awardees:*
   Awards are made based on an organization's demonstrated ability to perform successfully under the terms and conditions of a proposed contract, or, in the case of sealed bids, price, quality and convenience of the goods or service being provided.

   When soliciting architectural/engineering, legal or accounting professional services, CSRC evaluates each competitor's qualifications and the most qualified competitor is selected subject to the negotiation of fair and reasonable compensation.

   CSRC uses a formal rating system to evaluate the ability of a service provider to adequately deliver the services desired at a reasonable cost when sealed bids are required. This evaluation includes a complete review of staffing, facilities, the organization's past performance, budgets, financial capability and references, as well as other considerations pertinent to successful and competent performance. Evaluations are completed by assigning point values to the qualities of each service provider, totaling individual scores, averaging each rater's totals and ranking all proposals according to that average. The proposer who ranks first is generally recommended as the choice for service provider unless there is some extenuating circumstance that would be detrimental to CSRC's interest.

   The primary consideration in selecting service providers is their demonstrated ability to perform successfully under the terms and conditions of the proposed contract. These determinations are completed in writing and take into consideration the following:

   - Adequate financial resources to operate the contracted program or the ability to obtain them;
   - The ability to meet the specifications or conditions of the program at a reasonable cost, and the ability to meet performance goals;
   - A satisfactory record of past performance including demonstrated quality of training; reasonable dropout rates; the ability to provide or arrange for appropriate supportive services including child care; retention in employment; and earning rates of participants;
   - A satisfactory record of business ethics and fiscal accountability; and
   - The necessary organization, experience, accounting and operational controls, and the technical skills to perform the required work.

   In determining demonstrated performance of institutions and organizations that provide training, performance measures such as retention in training, training completion, job placement, and rates of licensure of program completers are taken into consideration.

CSRC will take all necessary affirmative steps to assure that small businesses, minority firms, veteran-owned, women-owned business enterprises, and labor surplus area firms are used when possible. Information is requested through the RFP process regarding the classification and ownership of the proposing organization.

No occupational skills training programs are funded unless the level of skills provided in the program is in accordance with guidelines established by the Board and industry standards. These guidelines are a part of each application for training services.

CSRC will impose the following requirements on sub-recipients:

- Funds shall not be used to pay the salary and bonuses of an individual, either as direct costs or indirect costs, at a rate in excess of Executive Level II for ETA approved funds;
- CSRC requires an approved federally recognized indirect cost rate or a rate negotiated between CSRC and the sub-recipient in compliance with 2 CFR 203.331, or a de Minimis indirect cost rate; and
- The sub-recipient will permit CSRC and its auditors access to the sub-recipient's records and financial statements, as necessary.

For the awarding of On-the-Job Training (OJT) contracts, which are non-competitive procurements, historical records of employer's past performance are checked to determine their ability to perform. Employers who have had two or more previous OJT contracts and exhibited a pattern of failing to provide participants continued long-term employment (minimum of one year) as regular employees with wages and working conditions at the same level and to the same extent as similarly situated employees are ineligible for a contract. The period of ineligibility for additional OJT contracts is six months.

Each employer's success rate will be tracked by CSRC employees. This assessment will include:

- Identification of the OJT employer;
- The number of OJT participants enrolled;
- The number of participants with neutral terminations (death, participant quitting, participant terminated for cause, other);
- An adjusted enrollment (The number of participants enrolled minus the number of neutral terminations);
- The percentage of successful participants (The number of successful participants divided by the adjusted enrollment);
- The percentage of unsuccessful participants (The number of unsuccessful participants divided by the number of adjusted enrollment);
- The percentage of successful participants with wage gains;
- The percentage of successful participants with no wage gains; and
- The percentage of successful participants with wage loses.

2. *Cost/Price Analysis*
A cost/price analysis will be made and documented in the procurement file in connection with every purchase in excess of the Simplified Acquisition Threshold specified in 2 CFR 200. Price analysis may be accomplished in various ways, including the comparison of price quotations submitted, market prices and similar indicia, together with discounts. Cost analysis is the review and evaluation of each element of cost to determine reasonableness, allocability and allowability.

3. *Contract Instruments:*
All contracts should identify:
   a) Type of contract based upon the business needs of the organization (i.e., cost-reimbursable, fixed-price, performance-based, purchase orders);
   b) Contract assurances (boilerplate);
   c) Term;
   d) All tasks the contractor is to perform (Statement of Work);
   e) Contract budget; *
   f) Events that trigger payment (deliverables);

g) Required level of services (performance standards);
h) Federally required contract provisions, certifications and assurances; and
i) ETA Salary Cap requirement under Section 7013 of Public Law 109-234.

*****Per 20 CFR Part 667.200, all procurement contracts and other transactions between local boards and units of state or local governments must be conducted only on a cost-reimbursement basis. No provision for profit is allowed.

4. *Contract Modification/Continuation/Renewal*
CSRC contracts will be one of the following:

- For a defined time period with a stated expiration date with no option for renewal;
- For a defined time period with a stated expiration date and a stated option for renewal; or
- Open-ended with no expiration date and renewable annually without the action of either party. Any contract of this type must allow CSRC, at least 60 days before automatic renewal, the absolute right to not renew the contract.

The modification and/or continuation/renewal of a contract will require the completion of a contract agreement modification and approval by the President/CEO or authorized designee. Contracts for goods or contractual services may be renewed for a period that may not exceed five (5) years. Renewal of a contract for goods or services will be in writing and will generally be subject to the same terms and conditions set forth in the initial contract. Renewals will be contingent upon satisfactory performance evaluations by CSRC and subject to the availability of funds.

5. *Procurement Files:*
Files on vendor and/or service provider procurements are maintained by the President/CEO or authorized designee. The procurement files shall include at a minimum the following:

- RFQ/RFP;
- Proof of public notice;
- Correspondence related to notification of prospective bidders and/or bidder list;
- Proposals submitted;
- Mailing lists of potential providers;
- Evaluation documentation;
- Conflict of Interest Statements;
- Debarment list clearance (if applicable);
- Minutes of committee and Board approval (if applicable); and
- Correspondence related to notification of awards

6. *Sub-recipient/Vendor Determination*
CSRC employees will evaluate the substance of each relationship to determine whether the features represent a vendor or sub-recipient relationship in accordance with 2 CFR 200. The Sub-recipient and Vendor Determination Checklist will be completed by CSRC employees in distinguishing between sub-recipient and vendor relationships.

7. *Appeals and Protests:*
A Party wishing to appeal/protest a contract award may submit an objection, in writing, to the President/CEO within 10 days of the award date. The written appeal to the contract award must state the specific reasons which are based on the following four criteria listed:

- clear and substantial error or misstated facts by the review team upon which the decision was made by CSRC;
- unfair competition or conflict of interest in the decision making process;
- any illegal or improper act or violation of law; or
- other legal basis on grounds that may substantially alter the CSRC Board of Directors decision.

The President/CEO will provide the information to the CSRC Executive Committee. This committee will investigate the written appeal and issue a written finding and resolution to the Party within 45 days of the receipt of the written appeal.

8. *Contract Payment:*
The terms and method of payment are specified in all contracts. Vendor contracts are usually fixed price contracts and payments are made at the satisfactory completion of the contract. Service provider contracts are cost reimbursement, fixed-unit price performance based, or a combination (hybrid) with satisfactory performance of the contract being a weighted criterion toward the continuance or renewal of the existing contract or the awarding of additional contracts. All contracts are monitored by CSRC to ensure contractors perform in accordance with the requirements of any awards.

Under cost reimbursement contracts, CSRC pays the service provider based on costs actually incurred. These costs are approved during contract negotiations through a thorough review of a line item budget and prior to the contract being awarded. Service providers are required to submit backup documentation with payments to justify the cost in relationship to the contract. The required documentation is negotiated along with other contract terms. Invoices submitted without documentation are not paid.

All payments are issued by check as follows:

To obtain payment, vendors and service providers must submit an invoice with appropriate documentation, when required, to the Finance Department. This invoice is compared with the contract terms and reviewed for accuracy and completeness. If the expenses outlined in the invoice are considered to be inappropriate for the contract, unnecessary or not reasonable, the invoice is not paid. If an invoice is incomplete or does not contain adequate documentation, the invoice may be returned to the vendor/service provider for correction prior to payment being issued. If the invoice is complete, but adequate documentation is missing for some items, a partial payment may be made for fully documented items and a request sent to the vendor/service provider for the additional documentation. The method applied is at the discretion of the CFO or designee. Decisions regarding the nonpayment of invoices or some items contained on an invoice will be sent to the vendor/service provider in writing with the reasons for nonpayment clearly described. If the invoice is complete and ready for payment, a Finance Department designee completes a voucher, attaches the voucher to the invoice and backup documentation, cuts and attaches a check and forwards the entire package to the President/CEO or Senior Vice President of Operations/COO for approval. Once approved, the package is sent back to the Finance Department for payment. Copies of all payments are maintained in the contract file.

Computerized records of each contract assist the CFO or designee in maintaining an accounting of each award, payments to date and balances.

9. *Contract File:*
Contract files contain documentation of detailed and sequential information of related major activities from the execution of the contract through close-out. At a minimum, contract files contain:

- A signed copy of the contract and all contract modifications, including supporting documentation for modification;
- Contract negotiation budgets and cost/price analysis;
- Information covering pre-award surveys or reviews and post-award conferences;
- Approval to subcontract, if applicable;
- Copies of required bonds and insurances;
- Orders issued by CSRC and CSRC's interpretation of contract provisions;
- Evidence of progress and payments to the service provider, including bills, invoices, vouchers, etc.;
- Monitoring reports and documentation of performance, including corrective action plans, responses, etc.;
- Audit reports;
- Property or equipment records, if applicable;
- Documents related to termination actions;
- Contract deliverables;
- Close-out records; and

- Other records relating to contract administration and monitoring.

All contract files will remain in CSRC's possession for the period in accordance with state and federal rules.

10. *Contract Close-out:*
Whenever a contract is closed, programmatic and fiscal information must be gathered and analyzed to determine whether the program goals and objectives for which services procured were accomplished and whether all funds were properly accounted for. Documentation gathered during the closeout process must be maintained as a subsection of the contract file. Closeout procedures should begin 60 days prior to contract expiration.

11. *Programmatic Closeout*
A programmatic closeout includes, but is not limited to, determining and documenting that:
- All deliverables and services have been delivered and accepted in writing;
- All reports (including Financial Status Report) have been received and accepted in writing;
- All program objectives agreed upon were met; and
- Liquidated damages/sanctions have been assessed for nonperformance or noncompliance.

12. *Fiscal Closeout*
A fiscal closeout includes, but is not limited to, determining and documenting that:
- Acquired non-expendable property has been returned to CSRC;
- Advances and/or interest earned on advances have been recovered or applied against what is owed;
- Match requirements have been met;
- Amounts assessed as liquidated damages/sanctions for nonperformance/ non-compliance have been recovered;
- Disallowed costs and/or unused grant funds have been recovered;
- Final payment to the provider is only made after all programmatic and fiscal steps have been completed;
- Required audits have been submitted and reviewed;
- All sub-contracts setup under the closed contract have been closed and settled;
- Bonds and insurance related to the contract have been canceled;
- CSRC has been released from any liabilities;
- Assign all refunds, rebates, or credits that may be due under the contract;
- Disclose any revenues earned in excess of costs, if applicable. Action may be required if funds paid are found to be in excess of costs incurred; and
- Financial Status Report has been reviewed by the CFO and approved in writing by the President/CEO or authorized designee.

THE REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK.

IV. PROPERTY MANAGEMENT:

CSRC's property management procedures comply with 2 CFR 200. It is CSRC's policy to account for all property purchased with state and/or federal funds. Property purchased with designated funds is used for purposes authorized by the funding sources. All purchased property is entered into an inventory of assets.

The property inventory is maintained by the President/CEO or authorized designee. Information on the inventory includes, as applicable, an identification number (property tag), description of the item, physical location, responsible individual or organization, name, make or manufacturer, year or model, manufacturer's serial number, date acquired, purchase price, condition (new, good, fair, poor), method of acquisition (including voucher number if purchased), fund source (including FAIN), who holds title, the percentage of Federal participation in project costs for the Federal award under which the property was acquired and any ultimate disposition data including the date of disposal and sale price of the property.

Property is defined as equipment, fixtures and other tangible personal property of a non-consumable and non-expendable nature purchased with designated funds and the value of which is $5,000 or more and the normal expected life of which is one year or more. Each item in this category recorded accurately in the general ledger and records maintained in the finance department. Each year, just prior to June 30 or as soon after as is practicable, and whenever there is a change in Property Custodian, an inventory of property is completed by a person other than the Property Custodian. The inventory is compared with the property records and all discrepancies are researched and reconciled. The inventory is maintained internally and does not need to be submitted to DEO.

All real and personal property, other than supplies acquired or produced with WIOA funds by a service provider that is a commercial organization will become the property of CSRC, and will be entered into inventory. The service provider must maintain property records consistent with CSRC's policies and procedures. These records must be submitted to CSRC on a regularly scheduled basis, as specified by the contract. Service Provider inventory records will be audited by CSRC. Properties purchased with CSRC funds must be returned to CSRC if the program or service for which it was purchased is no longer operational. These properties may be transferred to other service providers at CSRC's discretion.

When purchasing large/expensive items (i.e. copiers), CSRC ensures that a maintenance contract is included or purchased to adequately maintain the property over time. Before any property is titled as "trash", CSRC employees review the property and conduct an analysis to see if the cost to repair is less than the cost to replace.

CSRC will dispose of property that is no longer useful. The President/CEO will certify the property as surplus. Surplus property will first be offered, at fair market value, to other 501(c)(3) organizations via a notification on the CSRC website. Property that is not purchased by another 501(c)(3) will be offered for sale at fair market value. Property remaining after the sale will be donated to 501(c)(3) organizations. Any unclaimed property may be cannibalized and will be properly disposed of.

CSRC will follow the disposition requirements for property acquired with federal awards identified in 2 CFR 200.313.

Property with a current per-unit fair market value of $5,000 or less is retained, sold or otherwise disposed of with no further obligation to DEO. Property with a current per-unit fair market value in excess of $5,000 may be retained by CSRC or sold. CSRC will request disposition instructions from DEO. CSRC may transfer title to the property to another Local Workforce Development Board.

All funds generated from the sale of property will be used to enhance program services.

Capital expenditures for general purpose equipment, buildings, and land are unallowable as direct charges, except with the prior written approval from DEO.

Capital expenditures for special purpose equipment are allowable as direct costs, provided that items with a unit cost of $5,000 or more have the prior written approval from DEO.

Capital expenditures for improvements to land, buildings, or equipment which materially increase their value or useful life, are unallowable as a direct cost except with the prior written approval from DEO.
Special arrangements and alterations costs incurred specifically for a federal award are allowable as a direct cost with the prior approval from DEO.

Title to federally owned property remains vested in the federal government and CSRC will follow the requirements as outlined in 2 CFR 200.312.

Title to equipment acquired under a federal award will vest in the non-federal entity, subject to the conditions set forth in 2 CFR 200.313.

Equipment will be used by CSRC in the program or project for which it was acquired as long as needed, whether or not supported by the federal award, and CSRC will not encumber the property without prior approval of the federal awarding agency. CSRC will follow the requirements as outlined in 2 CFR 200.313.

Title to supplies will vest in CSRC upon acquisition. If there is a residual inventory of unused supplies exceeding $5,000 in total aggregate value upon termination or completion of the project or program and the supplies are not needed for any other federal award, CSRC will retain the supplies for use on other activities or sell them, but must, in either case, compensate the federal government for its share. The amount of compensation will be computed in the same manner as for equipment.

THE REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK.

V. RECORDS MANAGEMENT, NETWORK SECURITY AND CONFIDENTIALITY:

A. Records Management, Retention and Disposal:
CSRC follows 2 CFR 200.333 retention requirements for records.

B. Management Information System:
CSRC, its service providers and partners participate in and utilize the statewide Management Information System (MIS), which is maintained and supported by DEO. The statewide MIS applications include Subrecipient Enterprise Resource Application (SERA), One Stop Service Tracking (OSST), Employ Florida Marketplace (EFM) and Project Connect. Applicant and participant data are entered into these systems and transmitted daily. For each program year, applicant and participant characteristics, program activity, and outcome data, including available follow-up information on all participants exiting programs during the program year will be reported.

Access to the DEO MIS system gives CSRC, its service providers and partners electronic access to participant record and reports compiled by DEO. Management reports and tracking information are retrieved from the DEO MIS as needed. These reports are used to assess CSRC's progress toward meeting program goals.

CSRC's local MIS includes a financial component that consists of a human resources and fund accounting application. This application handles payroll and accounting records and reports for CSRC and its employees. All monthly financial reporting and cash advance requests are completed using SERA.

C. Terminals Connected to State System
CSRC owns and supports workstations that are located throughout the three-county LWDA. All workstations have internet connectivity for access to the DEO MIS.

D. Nondiscrimination Regulations:
Client and employment-related files are kept for a minimum of five years from the close of the applicable program year or, if part of an investigation of a complaint of alleged discrimination, a minimum of three years from the completion of that investigation. Files are kept longer if requested by the Director of the Civil Rights Center, United States Department of Labor. The information contained in the files is made available only to authorized individuals, in accordance with applicable federal and state regulation. Employment-related data for applicants and terminations, as well as for employment actions such as promotions and transfers, are maintained for a minimum of five years.

E. Confidentiality and Security of Records:
Confidential information is not released unless specifically authorized by law. All subpoenas and public records requests received are forwarded to CSRC's administrative office. CSRC will provide guidance on those requests based on state law, regulations and guidance.

F. Security and Intrusion Protection:
In compliance with NIST risk management guidelines and DEO protocol 5.05.02.09, CSRC will conduct vulnerability assessment and analysis at least annually to ensure all internal/external points of entry are secure. CSRC will thoroughly document any/all testing completed during either an internal or a 3rd party scheduled assessment. Documentation can be made available upon request.

THE REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK.

VI. GRIEVANCE PROCEDURES:

A. Customers/Clients:
The grievance procedures for customers are outlined in the Grievance Complaint Process form for customers and clients. CSRC will follow this process and update as required.

B. Vendors/Service Providers/ Partners:
The above may file a grievance/complaint with CSRC by first contacting the Administrative Office.

If the appropriate CSRC designee is unable to resolve the grievance/complaint within 10 calendar days of receiving the grievance/complaint, it will be elevated to the President/CEO or in the case of contract negotiations and changes in contract awards to the CSRC Executive Committee. If the grievance/complaint cannot be resolved within 10 calendar days at this level, the grievant/complainant may elevate the grievance/complaint to the CSRC chairperson, in writing. The written explanation must be concise and include facts, laws, procedures, etc., that the grievant/complainant believes to be relevant for review. The grievant/complainant must include the mailing address where official notices related to the complaint are to be mailed. The CSRC Executive Committee will hear the grievance/complaint and issue a decision within 60 days of hearing the grievance/complaint. The meeting notice and the CSRC Executive Committee's decision will be sent to the grievant/complainant certified mail, return receipt requested.

If the grievant/complainant is dissatisfied with the CSRC Executive Committee's decision or fails to make a decision or review the grievance/complaint within the 60 calendar days, the grievant/complainant may elevate the grievance/complaint via a written letter sent certified mail, return receipt to the Department of Economic Opportunity, Office of General Counsel, 107 E Madison St, MSC 110, Caldwell Building, Tallahassee, FL 32399-4128.

C. CSRC Employees:
Employees are expected to lodge complaints with their immediate supervisor. The supervisor is responsible for either resolving the complaint informally within 5 working days or elevating the complaint, in writing, to the Human Resources Department, if the supervisor is unable to resolve the complaint.

A Human Resources Department designee will attempt to resolve the complaint within 5 working days and to communicate the resolution, in writing, with both the supervisor and the employee at the end of the resolution period. If the Human Resources Department designee is unable to resolve the complaint, the Human Resources Department designee will elevate the complaint to the President/CEO.

The President/CEO will review all research and recommendations regarding the complaint, conduct additional research into the complaint, if necessary, and make a determination of resolution within 5 working days of receiving the complaint. The President/CEO's decision will be communicated in a joint meeting between all appropriate parties affected by the complaint and a written resolution will be provided to the employee who originally lodged the complaint with copies to the employee's supervisor and the Senior Vice President of Operations/COO. The President/CEO's decision is final.

If an employee's complaint involves the employee's immediate supervisor, the employee may file a written complaint directly with the Human Resources Department who will attempt to resolve the complaint. If a Human Resources Department designee is unable to resolve the complaint, the complaint is elevated to the President/CEO who will resolve the complaint and notify all appropriate parties, in writing, of the resolution.

A complaint by an employee of alleged discrimination on the basis of race, color, religion, national origin (including limited English proficiency), sex (including pregnancy, childbirth, and related medical conditions, sex stereotyping, transgender status and gender identity), disability, political affiliation or belief, or age shall be processed in the following manner:

- Within 20 calendar days of the occurrence of an alleged incident of discrimination by an employee of CSRC against another employee, the employee may file a written complaint with the Equal Opportunity (EO) Officer setting forth the date of the alleged incident. Other details not filed within this period shall be deemed untimely and shall not be processed.

- The EO Officer will investigate the complaint and issue a written ruling within 20 calendar days of receipt of the complaint.

- The employee may appeal the ruling to the President/CEO, or his/her designee, within 10 calendar days following receipt by the employee of the ruling. Any appeal not filed in a timely manner shall not be processed.

- The President/CEO, or his/her designee, shall review the ruling and conduct such further investigation as may be appropriate. The President/CEO's disposition of the complaint shall be issued within 20 calendar days.

- The employee may appeal the President/CEO's decision to the CSRC Executive Committee within 15 calendar days of the receipt by the employee of the President/CEO's decision, by filing a request for hearing before the committee. Any appeal not filed in a timely manner shall not be processed.

- The committee hearing shall be governed by the applicable CSRC Executive Committee rules. The decision of the committee shall be considered final agency action for purposes of judicial review.

An employee who fails to comply with the timeliness requirements for filing appeals as contained herein shall be deemed to have accepted the ruling or decision at the given level as satisfactory and acceptable, and to have waived the right to appeal further.

THE REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK.

VII. MONITORING, OVERSIGHT AND EVALUATION PLAN:

CSRC is responsible for monitoring all functions of administration and program operations. Monitoring will ensure maximum effectiveness and efficiency of all management, programmatic and fiscal systems and should ensure that abuses in program operations are identified in a timely manner, resulting in the prevention and/or elimination of any misuse of funds. CSRC contracts with an independent monitoring firm to review any potential programmatic and/or financial issues. All independent monitoring is coordinated through the CFO for fiscal and the Senior Vice President of Operations/COO for programs. CSRC will ensure that sub-recipients submit the required audit reports in accordance with 2 CFR 200.

A. Internal Programmatic Monitoring Team:
CSRC utilizes various team members with programmatic experience to ensure that programs are in compliance with federal/state/local regulations. The internal monitoring team is responsible with ensuring compliance with laws, regulations, policies and procedures. On a program year basis, a monitoring schedule is developed to ensure all programs are monitored regularly. Any issues discovered are reported to the Senior Vice President of Operations/COO and any service providers. Responsible parties are required to answer all written monitoring reports within 10 working days outlining the following:

- The action that was taken;
- Dates that the actions were taken;
- Preventative measures to reduce monitoring findings; and
- All needed documentation as noted in the written monitoring report.

Follow-up continues until all parties are confident all issues and problems are resolved. Records of all internal monitoring reports are maintained by CSRC.

The monitoring team will write a monitoring report that highlights the visits, the issues identified, and steps to resolve the issue. Periodically, the Senior Vice President of Operations/COO shares that report with the CSRC Program and Services Committee.

CSRC has developed a Procedure for Internal Monitoring, which details the following: the composition of the monitoring team; the schedule for monitoring, the programs, services, systems and items that will be monitored; the corrective actions to be taken as needed; and the reporting and documentation required.

B. Independent Monitoring Firm:
The monitoring firm meets with the CSRC team prior to any review to ascertain areas of concern and to obtain records collected in advance of the monitoring visit. The monitors review samples of programmatic and/or financial records using guidelines and checklists developed by the state and their staff to determine compliance with laws, regulations and policies.

1. *Monitoring Schedule:*
Each program and service provider is monitored onsite on a regular basis, but not less than once annually. An initial monitoring visit is conducted within 4 months of the start date of any program or contract or before the end of the contract in cases where the duration of the contract is less than four months unless extraordinary circumstances preclude this timeframe. At an exit interview held with the CSRC team and service providers, the monitors review their observations and findings and offer suggestions for improvement.

2. *Monitoring Reports:*
All monitoring visits are documented with a written report that includes the areas monitored, observations, significant findings and recommendations noted by the monitor. The fiscal staff reviews the monitoring reports prepared by the independent monitoring firm. The report outlines the results of the monitoring review and any corrective action necessary. The CSRC fiscal team is required to respond in writing to all findings and/or observation with a Corrective Action Plan. The Corrective Action Plan is reviewed by the Senior Vice President of Operations/COO and within 20 working days forwarded to the firm. The firm reviews the Corrective Action Plan and sends its reaction(s) to CSRC within 10 working days of receipt. Summaries of Findings and actions taken will be provided to the appropriate CSRC committee(s).

3. Follow-up:
Follow-up proceeds according to the Corrective Action Plan and continues until all findings are satisfactorily resolved. Follow-up is completed by the CSRC team. The CSRC team reports any unresolved findings to the CSRC Executive Committee.

C. Corrective Action Plans and Follow-Up:
CSRC requires employee(s) and service provider(s) who are found to be out of compliance with any contractual agreements, the law, and/or program regulations to complete a Corrective Action Plan. They are required to respond in writing with a Corrective Action Plan within 20 working days from the request of CSRC.

A Corrective Action Plan should outline the following:
- The problem or issue;
- The proposed solution with preventative measures;
- The implementation timeframe;
- The expected outcome;
- Monitoring steps to ensure progress; and
- How success will be monitored.

Once a Corrective Action Plan is received by CSRC, the plan will be reviewed by the appropriate CSRC team. Once the plan is accepted by the CSRC team, the employee(s) or service provider(s) will be asked to execute the Corrective Action Plan. The CSRC monitoring team will track the progress of the Corrective Action Plan and provide feed-back to employee(s) or the service provider(s). Any/all Corrective Action Plans and follow-up information will be shared with the appropriate CSRC committee(s).

D. Technical Assistance and Guidance:
CSRC provides technical assistance and guidance in the areas of management, programmatic and fiscal systems to service providers upon written request or demonstrated need. When a request is received, or a demonstrated need is identified such as following a monitoring review, the service provider is contacted and an interview is scheduled. The purpose of the interview is to identify the areas where technical assistance is needed, identify and assign a monitoring team to be involved, set a timetable for completing assistance, and establish benchmarks or goals that are to be achieved. A written plan for technical assistance is completed with the service provider and filed with CSRC. Entrance and exit interviews are held with the appropriate parties to facilitate planning and follow-up of the technical assistance. Follow-up continues until both CSRC and the service provider are confident all issues and problems are resolved. Records of all technical assistance are maintained by CSRC.

For its own service-delivery employees, CSRC provides specialized training necessary for employees to perform their assigned functions.

E. Review and Evaluation of Employees and Service Providers:
CSRC reviews the progress and success of its employees and service providers through quarterly reports. These quarterly reports cover the performance and expenditures of employees and service providers and the CSRC team compares outcomes, success rates, cost effectiveness and the employee or service provider value to the community based on monitoring reports and information obtained from the DEO MIS. The President/CEO reviews all reports prior to review by the CSRC Executive committee and makes recommendations regarding employees or service provider's performance.

F. Program Quality and Outcomes:
CSRC ensures that employees and service providers achieve program quality and outcomes that meet the objectives of federal, state and local programs and of the CSRC Board of Directors by providing technical assistance and guidance, as needed; regularly monitoring; comparing results with CSRC, federal and state standards, and requiring corrective actions when necessary; following up to ascertain that corrective actions are completed, and documenting progress through regular reporting to CSRC. Service provider contracts include the required outcomes and quality standards required by CSRC and has assigned goals so there is no question as to what performance is expected.

G. De-obligation of Funds and Cancellation of Contracts:
A service provider's contract may be terminated immediately, in whole, or from time-to-time, in part, if CSRC determines that the service provider failed to:

- Provide any of the contracted services; or
- Comply with the provisions of the contract; or
- Perform in whole or part, or failed to make sufficient progress so as to endanger performance of the service provider's obligations to operate the contracted service or program; or
- Termination is in the best interest of the CSRC Board of Directors.

The service provider will be notified by registered mail, return receipt requested. The termination will be effective immediately and the service provider will be given 30 days after the termination to close out the contract.

If the service provider disagrees with the reasons for termination, they may file a grievance in writing within 10 days of Notice of Termination to the Treasure Coast Workforce Consortium. The Consortium will conduct a grievance hearing and decide, from the evidence presented by both parties, the validity of termination. Upon termination, the contract is considered canceled and all remaining funds de-obligated.

THE REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK.

VIII. NONDISCRIMINATION AND EQUAL OPPORTUNITY COMPLIANCE:

CSRC adopted policies and procedures related to Nondiscrimination and Equal Opportunity Compliance. CSRC and its service providers are required to comply with all nondiscrimination and equal opportunity rules and regulations contained in Title VI of the Civil Rights Act of 1994 and the nondiscrimination and equal opportunity requirements of the WIOA.

- CSRC is committed to the principle and practice of equal opportunity and affirmative action and intends to comply with the letter and spirit of federal, state and local laws and regulations prohibiting discrimination based on race, color, religion, sex (including pregnancy, childbirth, and related medical conditions, sex stereotyping, transgender status, and gender identity), national origin (including limited English proficiency), age, disability, or political affiliation or belief, or, against any beneficiary of, applicant to, or participant in programs financially assisted under Title I of the Workforce Innovation and Opportunity Act, on the basis of the individual's citizenship status or participation in any WIOA Title I–financially assisted program or activity.

. Participation in programs and activities is open to citizens and nationals of the United States, lawfully admitted permanent resident aliens, lawfully admitted refugees and parolees and other individuals authorized by the United States Attorney General to work in the United States. All employment and training programs are conducted under the principles of fair employment practices, equal opportunity and affirmative action. All individuals involved in the personnel process, including any persons having the authority to hire and promote, are responsible for making decisions consistent with this policy. CSRC accepts responsibility for informing employees and sub-recipients of this policy and requiring sub-recipients to comply with the policy's intent when carrying out their respective CSRC-funded activities.

CSRC has designated an Equal Opportunity (EO) Officer. All required EO reports are completed by the EO Officer. Copies are maintained and made available to the State EO Officer or compliance review staff upon request. A log of discrimination complaints is maintained by CSRC's EO Officer. The EO Officer will notify the Office of Civil Rights of any pending civil rights litigation.

CSRC requires all employees and service providers to comply with all applicable laws and regulations including the Civil Rights legislation and attaches General Provisions and Assurances to this effect in each service provider contract. Employees and Service Providers are expected to provide equitable services per a Non-Discrimination and Equal Opportunity Provision Assurance. CSRC requires employees and service providers to coordinate and participate in other community programs to ensure equitable services. CSRC requires employees and service providers to collect and enter customer information regarding race/ethnicity, sex, age and disability status into the state's automated data system. During monitoring, employees and service provider's compliance with the assurance statement will be checked. Facilities will be reviewed in accordance with federal and state accessibility requirements as well as checked for ADA compliance. For service provider(s), these affirmative action plans and grievance procedures will also be reviewed. A Corrective Action Plan will be required if the service provider is out of compliance. If an employee is out of compliance, a supervisor will take disciplinary action against the person violating non-discrimination and EEO rules.

When advertising job opportunities with CSRC, all advertisements include "EEO/AA" and "auxiliary aids and services are available upon request to individuals with disabilities" in the advertisement and CSRC's solicitations include open invitations to minority vendor/service providers.

THE REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK.

IX. CERTIFICATION REGARDING DEBARMENT AND SUSPENSION

CSRC uses the following language for service provider/vendor debarment and suspension certification:

1. The Service Provider certifies to the best of its knowledge and belief, that it and its principal:

   A. Are not presently debarred, suspended, proposed for debarment, and declared ineligible or voluntarily excluded from covered transactions by any federal department or agency.

   B. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with:

   - obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction, or contract under a public transaction;
   - violation of federal or state antitrust statutes; or
   - commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statement, or receiving stolen property.

   C. Are not presently indicted for, or otherwise criminally or civilly charged by a government entity (federal, state, or local) with commission of, any of the offenses enumerated in paragraph (1)(B) of this certification; and

   D. Have not, within a three-year period preceding this application/proposal/contract, had one or more public transactions (federal, state, or local) terminated for cause or default.

2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall submit an explanation to the council.

_____
Service Provider

_____
Name and Title of Certifying Representative

_____
Signature of Certifying Representative

_____
Date

X. INTERLOCAL AGREEMENT AND MEMORANDUMS OF UNDERSTANDING:

CSRC operates through an Inter-Local Agreement with the Treasure Coast Workforce Consortium, a group of three county commissioners appointed by their respective county commissions as representatives of the local elected officials.

The local One-Stop Career Center system includes a variety of community-based partners. CSRC's working relationship with these partners operates according to a Memorandum of Understanding among the partners.

THE REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK.

XI. SARBANES-OXLEY ACT OF 2002:

A. Audit Committee

The CSRC Executive Committee acts as the Audit Committee. The committee's responsibilities include:

- Oversight of the integrity of CSRC's financial management system;
- Procuring external auditors;
- Reviewing and approving all audits;
- Reviewing and resolving audit concerns;
- Retaining outside counsel, auditors, investigators, or other experts to fulfill its responsibilities; and
- Assuring internal controls adequate to prevent fraud and abuse.

B. Certification of Monthly Financial Statements

The President/CEO, Senior Vice President of Operations/COO and CFO will review interim financial statements which are presented to the CSRC Executive Committee.

C. Auditing Firm

Auditing services are competitively procured by CSRC. Auditing firms are procured every five years, or less, depending on the performance of the auditing firm. Auditing firms are prohibited from providing non-auditing services, unless those services are pre-approved by the CSRC Executive Committee, acting as the Audit Committee. The auditing firm is required to disclose all critical accounting policies and practices within the organization, as well as share any discussions with management about such policies and practices, to the committee.

To avoid conflicts of interest, CSRC's President/CEO, any Senior Vice President and/or Vice President, and all current CSRC Finance Department employees cannot have worked for the auditing firm for one year preceding the audit.

D. Whistleblower Protection Policy

It is CSRC's policy that each CSRC Board member, volunteer, and employee of CSRC, or its service provider(s), report any questionable or improper accounting or auditing matters, and violations of CSRC's Code of Conduct. No CSRC Board member, volunteer or employee of CSRC who, in good faith, reports a concern shall be subject to retaliation or, in the case of an employee, adverse employment consequences.

Anyone reporting a concern must act in good faith and have reasonable grounds for believing the information disclosed indicates an improper accounting or auditing practice, or a violation of the Code of Conduct. The act of making allegations that prove to be unsubstantiated, and that prove to have been maliciously, recklessly, or with the foreknowledge that the allegations are false, will be viewed as a serious disciplinary offense and may result in discipline, up to and including dismissal from the volunteer position, or termination of employment. Such conduct may also give rise to other actions, including civil lawsuits. The knowing destruction, alteration, mutilation, or concealment of any record, document, or tangible object with the intent to obstruct or influence an investigation of a concern or the proper administration of matters necessary to resolve the concern is considered a violation of CSRC's Code of Conduct and may result in disciplinary action. Such conduct may also give rise to other actions, including civil lawsuits.

Any volunteer or employee who retaliates against someone who has reported a concern in good faith is subject to discipline up to and including dismissal from the volunteer position or termination of employment.

The President/CEO is responsible for reporting all concerns and making recommendations to the CSRC Executive Committee. The CSRC Executive Committee, acting in the role of an Audit Committee, is responsible for investigating and taking corrective action on all concerns, or, as appropriate, to make corrective action recommendations to the CSRC Board of Directors on all reported concerns.

Concerns and investigations pertaining to the concerns are kept confidential to the extent possible, consistent with the need to conduct an adequate investigation. Disclosure of reports of concerns to individuals not involved in the investigation is viewed as a serious disciplinary offense and may result in discipline, up to and including termination of employment.

To report concerns, employees must first discuss their concern with their immediate supervisor. If after speaking with the supervisor, the employee has reasonable grounds to believe he/she has a valid concern and is not satisfied with the supervisor's response, the employee must report the concern to the Senior Vice President of Operations/COO. If an employee is uncomfortable speaking with his/her immediate supervisor, or the supervisor is the subject of the concern, the concern should be reported directly to the Senior Vice President of Operations/COO.

All concerns must be submitted in writing. Supervisors and the Senior Vice President of Operations/COO must report any concerns immediately to the President/CEO, or the CSRC Board of Director's Chairperson if the President/CEO is the subject of the concern.

If the supervisor or Senior Vice President of Operations/COO does not report the concern immediately to the President/CEO, the employee should directly report the concern to the President/CEO, or if the President/CEO is the subject of the concern, to the CSRC Board of Director's Chairperson.

Concerns may be submitted anonymously in writing and sent directly to the President/CEO, unless the President/CEO is a subject of the concern, in which case the employee should send the written concern directly to the CSRC Board of Director's Chairperson.

CSRC and other volunteers should submit concerns, in writing, directly to the President/CEO unless the President/CEO is a subject of the concern, in which case, the concern should be submitted to the CSRC Board of Director's Chairperson.

The CSRC Executive Committee, acting as the Audit Committee, addresses all reported concerns. Within five business days of receiving a concern, the President/CEO or the CSRC Board of Director's Chairperson, as appropriate, acknowledges receipt of the concern in writing to the individual submitting the concern, unless the concern is anonymous.

The President/CEO reports all concerns received during a month, as well as any actions taken on previously filed concerns, or the disposition of previously filed concerns to the CSRC Executive Committee, acting as the Audit Committee.

All concerns are promptly investigated by either the President/CEO, or the CSRC Executive Committee acting as the Audit Committee, as the case may be, and if warranted by the investigation and depending on the circumstances, appropriate corrective action may be taken directly by the President/CEO or the committee and reported to the CSRC Board of Directors at the next scheduled meeting.

If the President/CEO or CSRC Executive Committee, acting as Audit Committee, chooses not to take corrective action directly, the concern and recommended action is reported to the CSRC Board of Directors at the next scheduled meeting. Action taken must include a conclusion and/or follow-up with the person making the complaint resulting in complete closure of the concern.

The President/CEO and the CSRC Executive Committee, acting as Audit Committee, have the authority to retain outside legal counsel, accountants, private investigators, or any other resource deemed necessary to conduct a full and complete investigation of the allegations.

THE REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK.

XII. CONTINUITY OF OPERATIONS/DISASTER PREPARATION & RECOVERY

CSRC maintains a Continuity of Operations/Disaster Preparation and Recovery Plan including the following information:

- An organizational risk analysis;
- General procedures for protecting lives and assets;
- Recovery efforts;
- Continuity of operations; and
- A disclaimer.

The plan outlines the policies and procedures related to the preparation and recovery from disasters that affect CSRC's administrative office and the local One-Stop Career Center system. These policies and procedures are reviewed and updated annually by CSRC's management teams. Lessons learned from disasters are used to continuously improve the plan.

Copies of CSRC's Continuity of Operations/Disaster Preparation & Recovery Plan can be obtained at the administrative office located at 584 NW University Boulevard, Suite 100, Port St. Lucie, Florida.

THE REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK.

ATTACHMENT I

I. PURPOSE:

This manual contains procedures for authorizing and obtaining reimbursement of travel expenses by employees and other authorized persons of the Workforce Development Board of Treasure Coast /dba CareerSource Research Coast (CSRC). Appropriate travel is defined as critical to the CSRC mission and meets the Board of Directors expectations of fiscal constraint. All requests for approval and payment for travel expenses will be accomplished in accordance with Section 112.061, F.S. and these procedures. The requirements contained within apply to all travel whether paid for with State or Federal funds. In addition, the requirements apply whether paid by reimbursement, contractual agreements, or other methods of payment, including payment to a contractor or volunteer. All requests for approval and payment for travel expenses will be accomplished in accordance with the statutory law, administrative rules, and procedures contained herein.

II. AUTHORITY:

The authority for this manual is contained in Section 445.007(10), Florida Statutes, which requires local workforce boards to reimburse standard travel in accordance with rates established in Section 112.061, Florida Statutes, and in compliance with applicable state and federal requirements. Rule-Chapter 69I-42.007-Travel Expenses, Florida Administrative Code (F.A.C.), where applicable, has been relied on in drafting this template in compliance with Section 445.007(10), Florida Statutes.

NOTE: This manual is not intended to cover all possible travel situations. Some situations will be addressed on an individual basis.

III. DEFINITIONS:

A. **Authorized person or authorized traveler:** CSRC employee, board member, or other persons traveling on CSRC business who are authorized to incur travel expenses in performance of CSRC duties. This expressly includes consultants and advisers, per Section 112.061(2)(e)2, F.S.

B. **Class A Travel:** Continuous travel of 24 hours or more away from CSRC headquarters. Overnight absence from CSRC headquarters must be reasonable and necessary to conduct CSRC business.

C. **Class B Travel:** Continuous travel of less than 24 hours which involves overnight absence from CSRC headquarters. The travel day for Class B begins at the same time as the travel period. Overnight absence from official headquarters must be reasonable and necessary to conduct CSRC business.

D. **Class C Travel:** Travel for short or day trips where the traveler is not away from his or her official headquarters overnight. The *Authorization to Incur Travel Expense* form is not required for Class C travel within the LWDA.

1. Employees are required to complete the *Monthly Mileage Reimbursement* form for all Class C travel and must use Google Maps or MapQuest to calculate mileage. Only direct routes can be used and any personal side trips must be deducted. The Finance Department will keep a Standard Miles chart along with any/all Google Maps and/or MapQuest verification documentation for those trips that occur regularly to include the approved mileage between the Career Center offices within the local workforce development area. Employees should submit a reimbursement request monthly but no longer than quarterly, if approved. {Not required by Statute or Rule. Recommended Best Practice.}

NOTE: CLASS "C" TRAVEL PER DIEM OR SUBSISTENCE ALLOWANCES ARE CURRENTLY NOT TO BE REIMBURSED TO TRAVELERS. {Source: Section 112.061(15), F.S.}

E. **Complimentary/Gratuitous Transportation:** Transportation which is provided free of charge by another CSRC authorized traveler in a travel status. A traveler shall not be allowed either mileage or transportation expenses if gratuitously transported by another traveler who is entitled to mileage or transportation expense. The traveler should still show how and with whom he/she traveled when requesting reimbursement for other costs incurred during travel.

F. **Conference/Convention:** The coming together of persons with a common interest or interests for the purpose of deliberations, interchange of views, the removal of differences or disputes and discussion of their common problems and interests. The term also includes similar meetings such as seminars and workshops that are large formal group meetings programmed and supervised to accomplish intensive research, study, discussion and work in some specific field or on a governmental problem or problems.

G. **Headquarters:** The headquarters of an authorized traveler assigned to an office shall be the city or town in which the office is located except that:

1) For Board of Directors, the headquarters is the primary address for the CSRC Administrative office. {Source: Section 112.061(4), F.S.}

2) When any CSRC employee is stationed in any city or town for a period of over 30 continuous workdays, such city or town shall be CSRC headquarters and the employee shall not be allowed per diem or subsistence, as provided in this section, after the period of 30 continuous workdays has elapsed, unless this period of time is extended by the express approval of the President/CEO or his/her authorized designee. {Source: Section 112.061(4), F.S.}

3) An authorized traveler may leave his/her assigned post to return home overnight, over a weekend, or during a holiday, but any time lost from his/her regular duties shall be taken as annual leave and authorized in the usual manner. The traveler shall not be reimbursed for travel expenses in excess of the established rate for per diem allowable had the traveler remained at the assigned post. However, when a traveler has been temporarily assigned away from CSRC headquarters for an approved period extending beyond 30 days, the traveler shall be entitled to reimbursement for travel expenses at the established rate of one round trip for each 30-day period actually taken to his/her home in addition to pay and allowances otherwise provided. {Source: Section 112.061(4), F.S.}

H. **Travel Advances:** An advance disbursement of funds prior to actual travel.

IV. AUTHORITY TO INCUR TRAVEL EXPENSES:

Section 112.061(3)(a), Florida Statutes, states: *All travel must be authorized and approved by the head of the agency, or his or her designee, from whose funds the traveler is paid. The head of the agency shall not authorize or approve such a request unless it is accompanied by a signed statement by the traveler's supervisor stating that such travel is on the official business of the state and also stating the purpose of such travel**. (For a Local Workforce Development Board (LWDB), the "Head of the Agency" is the Board of Directors. In compliance with this provision, the LWDB may designate either a board member or a board employee to authorize travel expenses. A board is not a state agency.)***

Section 112.061(3)(b), Florida Statutes, states: *Travel expenses of travelers shall be limited to those expenses necessarily incurred by them in the performance of a public purpose authorized by law to be performed by the agency and must be within the limitations prescribed by this section.*

Section 445.007(10), Florida Statutes, states: *Preapproved, reasonable and necessary per diem allowances and travel expenses may be reimbursed. Such reimbursement shall be at the standard travel reimbursement rates established by s. 112.061 and shall be in compliance with all applicable federal and state requirements.*

2 CFR Part 230, Appendix B, Selected Items of Cost, paragraph 51 states:

a. General. Travel costs are the expenses for transportation, lodging, subsistence, and related items incurred by employees who are in travel status on official business of the non-profit organization. Such costs may be charged on an actual cost basis, on a per diem or mileage basis in lieu of actual costs incurred, or on a combination of the two, provided the method used is applied to the entire trip and not to selected days of the trip, and results in charges consistent with those normally allowed in like circumstances in non-profit organization's non-federally-sponsored activities.

A. An *Authorization to Incur Travel Expense* form must be completed and approved by the Board of Directors or assigned designee for ALL travel prior to the beginning date of travel. This includes Travel Advances. {Source: Sections 445.007(10) (12), & 112.061(11), F.S.}

B. Refer to CSRC's Administrative Plan, published by CSRC, to confirm who is authorized to approve travel.

C. The authorization form should include, but not be limited to:
   1) Name of each traveler,
   2) Purpose of the travel,
   3) Estimated, itemized cost to CSRC and
   4) Statement of benefits accruing to CSRC by virtue of such travel. {Source: Section 112.061(11), F.S.}

D. Attached to the form should be a copy of the program or agenda of the convention or conference, itemizing the registration fees, and any meals or lodging included in the registration fee. {Source: Section 112.061(11), F.S}

E. The form is required to be signed by the traveler and the traveler's supervisor stating that the travel is to be incurred in connection with CSRC business. {Source: Section 112.061(11), F.S.}

F. A copy of the completed form shall be included as support for the travel reimbursement voucher. {Source: Section 112.061(11), F.S.}

G. CSRC may pay for travel expenses of candidates for executive or professional positions, where written approval of the Board of Directors or their designee is obtained. {Source: Section 112.061(3)(d), F.S.}

V. MEALS AND PER DIEM:

A. Reimbursement for meals is only allowable when in authorized Class A or Class B travel status and for those who are approved for reimbursement of those meals, as included in Section IV above. Reimbursement of meals for Class C travel status is not allowed. {Source: Section 112.061, F.S and 445.007(10), F.S.}

B. Per Section 112.061(6), F.S. (2013), the current approved meal allowance rates are as follows:
   - Breakfast - $6.00 *(When travel begins **BEFORE** 6 a.m. and extends **BEYOND** 8 a.m.)*
   - Lunch - $11.00 *(When travel begins **BEFORE** 12 noon and extends **BEYOND** 2 p.m.)*
   - Dinner - $19.00 *(When travel begins **BEFORE** 6 p.m. and extends **BEYOND** 8 p.m.)*

C. In determining the starting or ending time for the travel event, the time of day is important. When returning during work hours, the official work site location should be the return destination, unless otherwise approved by the President/CEO or his/her designee. If returning after or before work hours, the destination, and therefore the point when travel concludes, is the traveler's home. The same considerations apply for determining when travel begins.

D. When a meal is included in a registration fee, the meal allowance must be deducted from the reimbursement claim, **even if the traveler decides for personal reasons not to eat the meal**. As provided in Attorney General Opinion 081-53, a continental breakfast is considered a meal and must be deducted if included in a registration fee. {Source: Section 112.061(6)(c), F.S.}

E. In the case where a meal is provided by a hotel or airline to all guests, the traveler will be allowed to claim the meal allowance by law.

F. Per diem may be used to calculate reimbursement due for days of travel which do not include hotel costs, for example, the final day of a trip. The allowable rate for per diem is currently eighty dollars, as provided for in Section 112.061(6)(a)1, F.S. (2013) All claims for per diem and subsistence must be within the limitations set forth in this section of the statutes.

G. All travelers are allowed the authorized per diem for each day of travel or if actual expenses exceed the allowable per diem, the amount allowed for meals as provided in Section 112.061(6)(b), F.S., plus actual expenses for lodging at a single occupancy rate. Per diem shall be calculated using four six-hour periods (quarters) beginning at midnight for Class A or when travel begins for Class B travel. Travelers may only switch from actual to per diem while on Class A travel on a midnight to midnight basis. A traveler on Class A or B travel who elects to be reimbursed on a per diem basis is allowed $20.00 for each quarter from the time of departure until the time of return. {Source: 69I-42.006, F.A.C.}. Per diem is as follows:

- 12:00 AM – 6:00 AM = $20.00
- 6:01 AM – 12:00 PM = $40.00
- 12:01 PM – 6:00 PM = $60.00
- 6:01 PM – 11:59 PM = $80.00

VI. TRANSPORTATION:

Section 112.061(7)(a), Florida Statute, states: *All travel must be by a usually traveled route. In case a person travels by an indirect route for his or her own convenience, any extra costs shall be borne by the traveler; and reimbursement for expenses shall be based only on such charges as would have been incurred by a usually traveled route.*

2 CFR Part 230, Appendix B, Selected Items of Cost, paragraph 51 states:

c. Commercial air travel.

1) *Airfare costs in excess of the customary and standard commercial airfare (coach or equivalent), Federal Government contract airfare (where authorized and available), or the lowest commercial discount airfare are unallowable except when such accommodations would: require circuitous routing; require travel during unreasonable hours; excessively prolong travel; result in additional costs that would offset the transportation savings; or offer accommodations not reasonably adequate for the traveler's medical needs. The non-profit organization must justify and document these conditions on a case-by-case basis in order for the use of first-class airfare to be allowable in such cases.*

2) *Unless a pattern of avoidance is detected, the Federal Government will generally not question a non-profit organization's determinations that customary standard airfare or other discount airfare is unavailable for specific trips if the non-profit organization can demonstrate either of the following: that such airfare was not available in the specific case; or that it is the non-profit's organization's overall practice to make routine use of such airfare.*

d. Air travel by other than commercial carrier. Costs of travel by non-profit organization-owned, - leased, or –chartered aircraft include the cost of lease, charter, operation (including personnel costs), maintenance depreciation, insurance, and other related costs. The portion of such costs that exceeds the cost of allowable commercial air travel, as provided for in subparagraph c., is unallowable

A. Travelers are encouraged to use the most economical means of travel when feasible. The most economical mode of travel is determined by the following conditions:

1. The nature of the business. {Source: Section 112.061(7), F.S.}

2. The most efficient and economical means of travel, considering time of the traveler, impact on the productivity of the traveler, cost of transportation, and per diem or subsistence required. {Source: Section 112.061(7), F.S.}

3. The number of persons making the trip and the amount of equipment or material to be transported. {Source: Section 112.061(7), F.S.}

4. Authorized travelers with a common destination are required to consider and evaluate joint utilization of vehicles. Approval for anything other than joint utilization must be requested in advance via the *Authorization to Incur Travel Expense* form and must include justification. {Not required by Rule or Statute. Recommended Best Practices.}

B. Airline Travel

1) Travel agency surcharges may be reimbursed as long as properly justified and a receipt is provided.

2) The traveler must provide a passenger receipt to be reimbursed for his/her airfare. An itinerary is acceptable as a receipt for electronic tickets. {Not required by Rule or Statute. Recommended Best Practices.}

3) Penalty for cancellation or exchange of a ticket may be paid by CSRC, only if the cause for the cancellation is in the best interest of CSRC, or if the cancellation is due to illness of the traveler or illness or death of a member of the traveler's immediate family. Justification should be included with the request for reimbursement. {Source: 69I-42.007(5), F.A.C.}

4) Transportation by chartered vehicles (including airplanes, buses, etc.) when traveling on CSRC business may be authorized when necessary or where it is to the advantage of CSRC, provided the cost of such transportation does not exceed the cost of transportation by privately owned vehicle, as allowed under Section 112.061(7)(d), F.S. {Source: Section 112.061(7)(e), F.S.}.

5) A traveler on a private aircraft shall be reimbursed the actual amount charged and paid for the fare for such transportation up to the cost of a commercial airline ticket for the same flight. The owner or pilot of such aircraft is also entitled to transportation expense for the same flight. {Source: Section 112.061(7)(h)}

C. Rental Cars

1) Enterprise is the state of Florida contract vendor for renting vehicles and should be used unless:
   a. The use of another rental company provides lower net rates that include primary insurance coverage as listed in Enterprise contract, payment of the collision damage waiver fee and controlled fuel price; or
   b. When Enterprise cannot provide vehicles; or
   c. When it is not feasible due to travel time or distance to an Enterprise rental company.

2) Vehicles rented from companies other than Enterprise must include primary insurance coverage. Inquire prior to rental to verify primary insurance coverage is provided. All major rental companies provide primary insurance coverage but many small companies provide secondary coverage with the renter's personal vehicle insurance coverage serving as primary.

   NOTE: Traveling employees should purchase collision damage insurance if a vehicle is rented from a vendor other than Enterprise.

3) Rental vehicles should be rented as close to the time of departure as reasonably allowed. Furthermore, rental vehicles should be returned as soon as possible upon the traveler's return. Failure to do so may result in a reduction of the reimbursement. {Not required by Rule or Statute. Recommended Best Practice.}

4) In areas where a non-airport rental facility exists at a comparable proximity, the non-airport facility should be used in order to avoid airport fees and surcharges. {Not required by Rule or Statue. Recommended Best Practice.}

5) The cost of the vehicle should be reasonable and necessary for the number of travelers, the type of travel, and the distance to be traveled. {Not required by Rule or Statue. Recommended Best Practice.}

D. CSRC/personal vehicles

1) Employees traveling to a common destination are required to consider and evaluate joint utilization of vehicles. Approval for anything other than joint utilization must be requested in advance via the *Authorization to Incur Travel Expense* form and must include justification. {Source: Section 112.061(7), F.S.}

2) CSRC-owned vehicles should be used when practical and available. {Not required by Rule or Statute. Recommended Best Practice.}

3) If travel is performed by a CSRC vehicle, "BOARD" should be entered in the map mileage column of the travel voucher. {Not required by Rule or Statute. Recommended Best Practice.}

4) If travel is complimentary, "COMP" should be entered in the map mileage column of the travel voucher. No reimbursement shall be made for gratuitous transportation. {Source: Section 112.067(7)(h) & Recommended Best Practice.}

5) Use of personal vehicles must be approved in advance via the *Authorization to Incur Travel Expense* form. {Source: Section 112.061(3)(a), 445.007(10), & Recommended Best Practice.}

6) The traveler is entitled to mileage allowance at a fixed rate of 44.5 cents per mile when using a personal vehicle. The reimbursement for expenditures related to the operation, maintenance, and ownership of a vehicle shall

not be allowed when privately owned vehicles are used in public business and reimbursement is made via mileage allowance. {Source: Section 112.061(7)(d), F.S.}

7) Employees are required to use the *Voucher for Reimbursement of Travel Expenses* form and Map mileage claimed may be from point of origin to destination based Google Maps, MapQuest or by using the official DOT highway map located at the web site below.

http://www2.dot.state.fl.us/CityToCityMileage/viewer.html

8) Vicinity mileage necessary to conduct CSRC business must be shown separately on the *Voucher for Reimbursement of Travel Expenses* form. Justification must be provided if the traveler logs vicinity miles in excess of 30 miles per day. {Not required by Rule or Statute. Recommended Best Practice.}

9) Flexibility may exist when other cost savings are considered. For example, multiple travelers might carpool to avoid multiple airport parking fees. In this case, the mileage used to pick up other travelers can be claimed. {Source: 69I-42.008(4), F.A.C. & Recommendations Best Practice.}

10) Vicinity mileage cannot be claimed while in a rental vehicle, if the cost of that vehicle is reimbursed by CSRC. Reimbursement shall be for the cost of mileage or the cost to rent the vehicle, whichever is more economical and authorized by the appropriate CSRC designee. {Source: Section 112.061, (7)(d)1, F.S.}

11) An employee may claim mileage from his/her home to a work location outside his/her official headquarters provided that travel begins more than one hour before or one hour after the traveler's regular work hours and provided the miles claimed do not exceed the miles actually driven. {Source: 69I-42.008(4), F.A.C.}

12) CSRC is not responsible for reimbursing parking fines or fines for unlawful driving. {Source: 2 CFR 230, Appendix B, Paragraph 16 (OMB A-122)}

VII. LODGING EXPENSES:

2 CFR Part 230, Appendix B, Selected Items of Cost, paragraph 51 states:

b. Lodging and subsistence. Costs incurred by employees and officers for travel, including costs of lodging, other subsistence, and incidental expenses, shall be considered reasonable and allowable only to the extent such costs do not exceed charges normally allowed by the non-profit organization in its regular operations as a result of the non-profit organization's written travel policy

A. An **itemized** hotel receipt must be submitted to claim reimbursement (**a credit card receipt is not sufficient**). {Source: 69I-42.006, F.A.C.}

B. All other reimbursable expenses included on a hotel receipt, such as parking or phone calls, should be properly listed in the incidental column of the travel voucher. {Source: Recommended Best Practice}

C. Employees can only be reimbursed at the single occupancy rate. {Source: Section 112.061(6)(a)2, F.S.}

D. Overnight lodging may not be reimbursed if travel is within the employee's headquarters or residence, unless the circumstances necessitating overnight travel are fully explained by the traveler and approved by the President/CEO or designee. Criteria for approval shall include late night or early morning job responsibilities and excessive travel time because of traffic conditions. {Source: 69I-42.006(7)}

VIII. REIMBURSABLE INCIDENTAL EXPENSES:

The below expenditure types, detailed in 69I-42.010, F.A.C., are required to be accompanied with a receipt, unless otherwise noted. These expenses should be listed in the incidental column of the travel voucher.

A. Taxi fares in excess of $25, on a per fare basis, require a receipt. Amounts less than $25 do not require a receipt.

B. Storage, parking fees or tolls in excess of $25, on a per transaction basis, requires a receipt. Amounts less than $25 do not require a receipt. Such fees are not allowed on a weekly or monthly basis unless it can be established that such method results in a savings to CSRC.

C. Dry cleaning, laundry and pressing expenses when official travel extends beyond seven days and such expenses are necessary to complete the official business portion of the trip.

D. Passport and visa fees required for official travel.

E. Fees charged for the purchase of traveler's checks for official travel expenses.

F. Fees for the exchange of currency necessary for official travel.

G. Cost of maps necessary for conducting Board business.

H. Communication expenses for business-related fax and telephone use can be reimbursed with proper justification. **Personal telephone calls made are not a reimbursable communication expense**.

I. Tips paid to taxi drivers that do not exceed 15 percent of the taxi fare are reimbursable and do not require a receipt.

J. Actual amount of tip paid for mandatory valet parking is not to exceed $1 per occasion are reimbursable and do not require a receipt.

K. Actual portage paid shall not exceed $1 per bag not to exceed $5 per incident are reimbursable and do not require a receipt. **Portage charges exceeding $5 per incident will require additional justification. The number of bags must be stated on the travel reimbursement request.**

L. Housekeeping gratuity paid shall not exceed $5 per day and does not require a receipt.

IX. CONFERENCE / CONVENTION TRAVEL:

A. Purpose of Conference: Public funds shall not be expended for attendance at conferences or conventions unless:

1) The main purpose of the conference or convention is in connection with the business of CSRC and is directly related to the performance of statutory duties and responsibilities of CSRC. {Source: Section 112.061(6)(a), F.S. & 69I-42.004(1), F.A.C.}

2) The conference or convention will provide a direct educational or other benefit supporting the duties of the traveler. {Source: 69I-42.004(1), F.A.C.}

3) The duties and responsibilities of the traveler seeking to attend such meeting are compatible with the objective of the particular conference or convention. {Source: 69I-42.004(1), F.A.C.}

B. No one, whether traveling out of state or in state, shall be reimbursed for any meal or lodging included in a convention or conference registration fee paid by CSRC. {Source: Section 112.061(7)(a), F.S.}

C. CSRC may pay the registration fee directly to the conference or convention sponsor or allow the traveler to include the registration fee in the calculation of their travel costs and reimburse the traveler. {Source: 69I-42.004(4), F.A.C.}

D. Documentation Needed:

1) Travel to a conference or convention must be approved in advance by the Board of Directors or authorized designee. Benefits to CSRC must be indicated on the authorization. {Source: 69I-42.004(2), F.A.C.}

2) The approved *Authorization to Incur Travel Expense* form must be submitted with the travel reimbursement request. {Source: 69I-42.004(2), F.A.C.}

3) A copy of the program or agenda of the conference or convention itemizing the registration fees and any meals or lodging included in the registration fee shall be attached to the *Voucher for Reimbursement of Travel Expenses* form when submitting for payment. {Source: 69I-42.004(3), F.A.C.}

4) If no agenda is available, or if the agenda attached is not clear as to what is included in the registration fee, the traveler will make a statement on the *Voucher for Reimbursement of Travel Expenses* form as to the extent of the meals included in the registration fee. The travel reimbursement request must be reduced by the applicable meal allowance. {Source: 69I-42.004(3), F.A.C.}

5) Payment in advance of earlier than twenty workdays before the travel period should be accompanied by written justification, such as discounts for earlier payment or earlier payment required for reservation. {Source: 69I-42.004(4), F.A.C.}

X. TRAVEL ADVANCES:

A. CSRC or its designee may make, or authorize the making of, advances to cover anticipated costs of travel to travelers. Such advancements may include the costs of subsistence and travel of any person transported in the care or custody of the traveler in the performance of his or her duties. {Source: 112.061(12), F.S.}

B. An *Application for Advance on Travel Expense* form is required to be completed and signed by the traveler and the traveler's supervisor. {Source: Recommended Best Practices}

C. Travel advances cannot be requested earlier than 30 days before the travel period begins without written justification of circumstances that necessitate an exception to this restriction. {Source: Recommended Best Practices}

D. Travel advances should not be requested if employee has access to a CSRC corporate credit card, unless extenuating circumstances due to a declared emergency prevent the use of the card (ex. hurricane, power outages, etc.). Any other exception to this directive must be justified in writing and approved in advance by the Board of Directors or authorized designee. {Source: Recommended Best Practices}

E. Travel advances requested solely to cover fuel costs are not justifiable. Use of a CSRC vehicle and associated gas card should be considered in these cases. {Source: Recommended Best Practices}

F. When the advance travel period has ended, the traveler shall properly complete a *Voucher for Reimbursement of Travel Expenses* form for the travel period for which he/she received an advance, within 30 days of the traveler's return to headquarters. {Source: Recommended Best Practices}

G. A traveler may not have more than one travel advance outstanding at any time without written justification and approval by the Board of Directors or authorized designee. {Source: Recommended Best Practices}

XI. REIMBURSEMENT OF TRAVEL EXPENDITURES BY INDIVIDUALS WITH DISABILITIES:

A. For individuals covered under the Americans with Disabilities Act (ADA), there are special provisions for travel reimbursement that apply. {Source: 69I-42.012, F.A.C.}

B. When a physically handicapped traveler incurs travel expenses in excess of those ordinarily authorized pursuant to Section 112.061, F.S., and such excess travel expenses were incurred to permit the safe travel of that handicapped traveler, those excess expenses will be reimbursed by CSRC to the extent that the expenses were reasonable and necessary to the safe travel of the individual. All such claims for reimbursement of excess travel expenses shall be submitted in accordance with the requirements of the Americans with Disabilities Act of 1990, 42 U.S.C. 12101 et seq. {Source: 69I-42.012, F.A.C.}

C. When a payment is requested pursuant to the Americans with Disabilities Act, which would not otherwise be authorized travel reimbursement, the voucher must include a signed statement from the Board chair or his designee certifying that:

1) An employee of CSRC, an applicant for a position or other covered person has requested a "reasonable accommodation" pursuant to the ADA, to assist him in performing his duties, applying for a position, or other covered activity. {Source: 69I-42.012, F.A.C.}

2) CSRC has determined that the individual is a "qualified individual with a disability" as defined in the ADA. {Source: 69I-42.012, F.A.C.}

3) CSRC has determined that the payment is for a "reasonable accommodation" pursuant to the ADA, for that employee, applicant or person. {Source: 69I-42.012, F.A.C.}

4) CSRC will maintain all records related to this request for seven years and make those records available for review to persons authorized to review such records. {Source: 69I-42.012, F.A.C.}

D. All vouchers related to providing a "reasonable accommodation" shall contain a file number or other code by which the voucher can be readily traced to the confidential records maintained by CSRC pursuant to paragraph (C)(4) above. {Source: 69I-42.012, F.A.C.}

XII. SUBMISSION AND PAYMENT OF TRAVEL REIMBURSEMENTS:

The provisions below are not required by law or rule, but involve the application of recommended best practices in submission and payment of travel reimbursement requests.

A. **The *Voucher for Reimbursement of Travel Expenses* should be completed in all instances even if the net amount due the traveler is zero.**

B. Submit original and one copy of all documentation with the *Voucher for Reimbursement of Travel Expenses* form. This includes ALL receipts and backup documentation.

C. Small receipts should be taped to a sheet of paper, not stapled.

D. The *Voucher for Reimbursement of Travel Expenses* form should show both reimbursable expenses to the traveler and expenses already paid by the purchasing card or corporate card and notated in the appropriate areas of the travel voucher.

E. Copies of all receipts paid with the purchasing card or corporate card must be attached.

F. The *Voucher for Reimbursement of Travel Expenses* form should be submitted within 30 working days of the last day traveled.

XIII. AMENDMENTS

Travel restrictions imposed by section 112.061, F.S. {2017-18 General Appropriations Act, SB2500, Section 58 provides that, notwithstanding s. 112.061, F.S., costs for lodging associated with a meeting, conference or convention organized or sponsored in whole or in part by a state agency or the judicial branch for a state employee may not exceed 150 dollars per day. An employee may expend his or her own funds for any lodging expenses in excess of 150 dollars.}

CareerSource RESEARCH COAST
a proud partner of the americanjobcenter

EXTENSION REQUEST TO
PROVIDE DIRECT SERVICES
EXTENSION BEGIN DATE: 7/1/2017
EXTENSION END DATE: 6/30/2020

As indicated in the attached Statement of Intent, The Workforce Development Board of the Treasure Coast, Inc. /dba CareerSource Research Coast (CSRC), with the approval of our three county Treasure Coast Workforce Consortium and the CSRC Board of Directors, submits the following request of an extension for our designation as direct provider of workforce services to CareerSource Florida, Inc. for approval. This extension request follows the outline suggested by the requirements received by email from the Department of Economic Opportunity (DEO) on April 20, 2017 and DEO Final Guidance FG-OSPS-83. The information required by this guidance is as follows:

1. **A review of how the provision of direct services during the original implementation period fit the business model the LWDB proposed in its original request, and any proposed changes in the business model or the particular workforce services the LWDB intends to provide during the extension period.**

The Workforce Development Board of the Treasure Coast, Inc. /dba CareerSource Research Coast (CSRC) officially became the direct provider of workforce services for Indian River, St. Lucie, Martin and Okeechobee counties on January 1, 2009. The business model, the cornerstone of our Business Improvement Plan, proposed in the original request to provide direct services, was fully implemented. The business model was successful in reducing costs, improving operations and performance. For Program Year 2014/2015, CSRC met six (6) of the 12 Workforce Common Measures and exceeded six (6) of the measures. For Program Year 2015/2016, CSRC met three (3) of the 12 measures and exceeded nine (9). CSRC placed seventh (7th) of the 24 local workforce development boards in the Performance Funding Model Performance for Program Year 2015/2016.

At their July 1, 2013 meeting, the Treasure Coast Workforce Consortium approved the request of the Okeechobee County Board of County Commissioners for the re-designation of Okeechobee County from local workforce development area (LWDA20) to local workforce development area (LWDA19) contingent upon the approval of the CSRC Board of Directors. At their October 30, 2013 meeting, the CSRC Board of Directors approved the request for the re-designation process to begin. For the following 20 months, CSRC collaborated with CareerSource Heartland to follow the process and procedures for a successful re-designation. The re-designation of Okeechobee County from LWDA20 to LWDA19 was effective on July 1, 2015.

The Workforce Development Board of the Treasure Coast, Inc. /dba CareerSource Research Coast (CSRC) has operated the WIA/WIOA Youth Workforce Services through a sub recipient agreement since 2012. Through a competitively procured process, CSRC awarded Henkels & McCoy Inc., an agreement for WIA/WIOA Youth Workforce Services on July 1, 2012. After performance reviews each year by the CSRC Youth Council and Board of Directors, the agreement was extended for two additional years. Effective April 1, 2016, Henkels & McCoy Inc., assigned their Training Services Division to Eckerd Youth Alternatives, Inc. The CSRC Board of Directors approved this assignment and the transfer of the WIA/WIOA Youth Program sub recipient agreement to Eckerd Youth Alternatives, Inc. As required by local procurement policy, CSRC issued a Request for Proposal procurement for WIOA Youth Workforce Services on February 23, 2016 with a deadline for submission of April 8, 2016. After the rating of a review committee and approval by the CSRC Youth Council, Executive Committee and Board of Directors, Eckerd Youth Alternatives, Inc., was awarded the sub recipient agreement for the period of July 1, 2016 through June 30, 2021, dependent upon annual performance reviews. At their April 2017 Youth Council meeting and after the PY2016-17 performance review, members recommended the extension of the Eckerd Youth Alternatives, Inc., WIOA Youth Workforce Services agreement for PY2017-18. This recommendation will be presented to the CSRC Executive Committee and the full Board of Directors at their May 2017 meetings.

With the Workforce Innovation & Opportunity Act (WIOA) signed into law on July 22, 2014, and the Final Rule effective on October 18, 2016, CSRC has made and is planning further changes to our business model and the workforce services provided during the requested extension period. These changes are outlined in our WIOA Local Plan for 2016 – 2020 submitted on April 30, 2016 and the Addendum to the Local Plan submitted on November 30, 2016.

Since 2009, CSRC has acted as the Administrative Entity, One-Stop Operator and the direct provider of workforce services. As indicated in our Addendum to the Local Plan and in accordance with WIOA legislation, the CSRC Board of Directors defined and approved the role and responsibilities of a One-Stop Operator at their January 2017 meeting. Subsequently, a Request for Proposal procurement was approved and issued for the services, as defined, of a One-Stop Operator for CSRC on March 1, 2017 with a deadline for submission of April 7, 2017. Two proposals were received and a review committee rated the proposals on May 2, 2017. A recommendation for approval of the highest rated proposer will be brought before the CSRC Executive Committee on 5/12/2017 as a voting item and before the Board of Directors at their meeting on 5/31/2017.

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

CareerSource RESEARCH COAST
a proud partner of the americanjobcenter

EXTENSION REQUEST TO
PROVIDE DIRECT SERVICES
EXTENSION BEGIN DATE: 7/1/2017
EXTENSION END DATE: 6/30/2020

2. The effective date, not to exceed three years, for when the extension will be in effect.

The extension of direct service delivery for CareerSource Research Coast will be in effect for the period of July 1, 2017 through June 30, 2020.

3. A review of the LWDB's stated reasons in its original request why the LWDB has decided to directly provide the workforce services, and an explanation of how it is in the best interest of the LWDB's customers that the LWDB continue to provide these services.

CSRC's primary reasons for assuming direct management of LWDA20 operations included cost savings, the opportunity to have more local control over operations and performance and to promote effective communication with employees, clients, business customers, community partners and the public at large.

As the direct provider of workforce services, CSRC has continually reduced administrative costs, eliminated duplication, and experienced additional cost benefits in staffing when the administrative and one-stop career center employees are united under the same organization. Given the budgetary challenges that CSRC has met and will continue to meet, the streamlining of management and oversight duties will be a key strategy for service delivery and continued performance outcomes.

In order to create a high quality one-stop career center system in LWDA20, CSRC has developed the following vision, mission and goals: VISION: To be the catalyst empowering our communities toward economic success. MISSION: Provide Opportunities. Improve Lives. GOALS: * Customer-Centric Culture: Expand our ability to identify and exceed customer needs and expectations. * Collaborative Partnerships: Expand our ability to meet the diverse needs in our community. *Marketing: Expand the awareness and understanding of the roles and responsibilities of CSRC and the resources, services our partners and we can provide. * Innovation: Promote continuous improvement. * Talent management: Be the best place to work.

4. A review of the effectiveness of the firewall established by the LWDB to clearly separate existing roles as oversight body to the local workforce area's workforce delivery system and its role as the operational services directly provided by the LWDB and an explanation of changes made to the firewall.

The appropriate firewalls established by CSRC guard against any conflict of interest and is described in detail in the Administrative Plan. These established firewalls were validated through the most recent, 2016 – 2017 Internal Control Questionnaire.

Through its governance structure and operational guidelines, CSRC ensures separation of oversight and management responsibilities. The Board of Directors also provides broad oversight through a committee structure, which for the purpose of workforce system oversight, is the Programs and Services Committee. Day-to-day operational management is the role of the CSRC management team, with specific responsibility for system management. This team, which consists of Directors, Operations Managers, Program Managers and a Program Analyst, report to the Senior Vice President of Operations/COO. The Senior Vice President of Operations/COO reports directly to the President/CEO. The President/CEO is the sole point of accountability to the Board of Directors in the management of local workforce operations.

CSRC and DEO employees provide client and customer direct services, exclusive of occupational skills training. The executive management team consists of the President/CEO, Chief Financial Officer/CFO and Senior Vice President of Operations/COO who is responsible for writing and implementing policy; the executive management team is not engaged in the day-to-day delivery of services. The day-to-day delivery of services tasks are assigned to employees stationed at the CSRC one-stop career centers and service-delivery access points.

CSRC's firewall is also enhanced through the procurement of a contracted, independent monitoring firm for all workforce programs along with any technical assistance if identified. In addition, program managers for the Welfare Transition, Wagner Peyser, WIOA Adult, Dislocated and Youth Programs provide continuous, local oversight and monitoring in their roles as subject matter experts.

Financial reporting and monitoring will continue to be contracted to a third party.

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

CareerSource RESEARCH COAST
a proud partner of the americanjobcenter

EXTENSION REQUEST TO
PROVIDE DIRECT SERVICES
EXTENSION BEGIN DATE: 7/1/2017
EXTENSION END DATE: 6/30/2020

Through the competitive procurement process required by WIOA for the selection of a One-Stop Operator, CSRC will examine one-stop operator effectiveness on a periodic basis. Additionally, regular competition will allow CSRC to make improvements in the role of the operator and other service delivery performance and metrics that may shift or change as we update MOU's with our required one-stop partners.

5. An identification of the grant programs(s) that currently fund the workforce service delivery model.

The workforce development system current funding sources include the following:
Workforce Innovation and Opportunity Act, Title 1, Adults
Workforce Innovation and Opportunity Act, Title 1, Dislocated Workers
Workforce Innovation and Opportunity Act, Title 1, Youth
Workforce Innovation and Opportunity Act Incentives
Welfare Transition Program
Supplemental Nutrition Assistance Program
Re-employment Assistance
Wagner Peyser
Wagner Peyser Incentives
Trade Assistance Adjustment
Veterans Employment Services
National Emergency Grant (NEG), if applicable

6. An analysis of the costs of the services that documents the actual reduction in costs with the RWB providing the services rather than contracting that service to another provider, and an estimate of such costs and savings for the upcoming period.

The actual reduction in costs with CSRC providing services rather than contracting service to another provider is as follows:

Program Year 2011/2012: Cost savings of $603,276.
Program Year 2012/2013: Cost savings of $664,638.
Program Year 2013/2014: Cost savings of $790,216.
Program Year 2014/2015: Cost savings of $697,590.
Program Year 2015/2016: Cost savings of $537,202.

7. A review of any other realized improvement to service delivery and performance outcomes, and description of anticipated improvements.

As the local workforce development board for LWDA20, CSRC continues to meet and exceed all performance outcomes. The following are examples of CSRC's performance:

- Met the ITA Waiver Requirement each year
- Met and exceeded the Common Measures
- Ranked seventh (7th) of the 24 local workforce boards in the Performance Funding Model for PY15-16
- Ranked in the top ten of the Governor's Monthly Job Placement Report
- Met the requirements of the Branding Initiative
- Ranked in the top ten of the Governor's Re-Employment Challenge.

Examples of our improvement to service delivery are listed below.

- Under the Florida Trade initiative, CSRC collaborated with Indian River State College to fund and support the delivery of an accelerated technical training program that would lead to entry-level jobs in manufacturing. The Fast Track to Manufacturing Program provides the opportunity for participants to attain the nationally recognized Certified Production Technician (CPT) certification.
- In 2017, the above mentioned fast track program has been tailored to support Florida Power & Light's efforts to recruit a skilled workforce for building two solar farms in LWDA20. Students graduating from the program are guaranteed a position as a Solar Installation Technician with the two contractors awarded the solar farm projects.

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

CareerSource RESEARCH COAST
a proud partner of the americanjobcenter

EXTENSION REQUEST TO
PROVIDE DIRECT SERVICES
EXTENSION BEGIN DATE: 7/1/2017
EXTENSION END DATE: 6/30/2020

- CSRC was awarded the 2016 Veteran's Performance Incentive Award for demonstrating exemplary services to veterans beyond the requirements of the grant during the course of the program year.
- CSRC held our second Homeless Veterans Stand Down in February 2017 with 26 partner organizations participating.
- CSRC assisted QVC with the closing of their Port St. Lucie location and worked with McKesson Corporation, the company taking over the location, to hire 125 of the workers being dislocated from QVC.
- For PY2015-16 and PY2016-17, our WIOA and WTP programs had no findings in the annual DEO programmatic monitoring.
- CSRC collaborated with St. Lucie EDC, area businesses and educational leaders to form a Workforce readiness taskforce *to assess the current skills gap in three targeted industries – Health Care, Manufacturing and Construction Skilled Trades.* The St. Lucie EDC contracted Gehant & Associates, a workforce consult firm, to conduct the Skills Gap Study. Surveys and interviews of area businesses from each sector were completed. Through this platform, businesses were able to articulate the needed skills and associated career options to both the prospective labor force and educational institutions. During the second phase of the project, the taskforce will begin implementation of business driven solutions to assist in the creation and sustainability of talent pipelines to meet current and future needs of each sector.
- CSRC's WIOA Youth Program has continued their partnership with the Martin Girls Academy (a level 10 DJJ facility), improving the services provided because of changes within WIOA.
- CSRC's WIOA Youth Program held their second annual Jobs+ Fair.
- The St. Lucie County Board of County Commissioners increased their grant funding by $50,000 (from $250,000 to $300,000) for the second annual Summer of Success Program (summer youth employment and work readiness program) due to the outstanding success of the program's first year.
- CSRC in collaboration with our employer, government, education and community partners, continues to conduct successful job fairs specific to industry and local community needs.
- In an effort to help close the skills gap experienced by the Transportation & Logistics Sector of LWDA20, CSRC has partnered with the Manufacturing Skills Standards Council (MSSC) to offer industry-recognized, nationally portable Certified Logistics Associate(CLA) and Certified Logistics Technician(CLT) credentials to help prepare individuals for careers in supply chain logistics

Under direct service provision, CSRC experiences more control over day to day operations and performance, as well as better communications with employees, clients, customers, community partners and the public at large. With the implementation of WIOA and as the workforce climate changes or new initiatives and goals are set, CSRC has the proven ability to reorganize its employees to create empowered teams with emphasis on customer centric service model with outstanding performance measures.

8. Documentation that the public was provided a meaningful opportunity for review and comment on the proposed extension for a period not less than 10 days. (include any submitted comments)

A notice of the request of an extension of our designation as direct provider of workforce services was posted to the CareerSource Research Coast website on May 15, 2017 through May 26, 2017. The public was invited to comment by sending an email to the Senior Vice President of Operations/COO. A special email, publicnotice@careersourcerc.com was established for this purpose.

9. Documentation that the Chief Elected Official has agreed to the planned extension. ATTACHMENT I

The Treasure Coast Workforce Consortium, along with the CSRC Board of Directors, approved this request with the signature page attached.

ATTACHMENTS:
A. Signature Page (Attachment sent by DEO)
B. Public Notice

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

BY-LAWS

OF

THE WORKFORCE BOARD OF THE TREASURE COAST, REGION 20

ARTICLE I - OFFICES

The principal offices of the corporation, hereinafter referred to as the Corporation, shall be located in Indian River, Martin or St. Lucie County, Florida, as the Corporation shall from time to time determine.

ARTICLE II - MEMBERSHIP AND DUTIES

The Corporation shall have not less than five members who shall constitute the Board of Directors of the Corporation. The membership will be appointed by the Consortium under the terms of the Interlocal Agreement creating the Board and the Consortium and entered into by Indian River, Martin and St. Lucie Counties. Membership shall be composed of those members required or authorized by state and federal law and as determined to be desirable by the Board of Directors, subject to appointment by the Consortium as provided for hereinabove. The term of membership shall be as set forth in said Interlocal agreement. Vacancies in the Board shall be filled by appointment by the Consortium. Any member who has less than 60% attendance at Board or Committee meetings, based on a program year (7/1-6/30), shall be removed as a member of the Board. Attendance via teleconferencing is limited to three Board meetings, unless approved by the Board in advance. The Board will reflect representation of the local community in terms of industry, race, age, gender, ethnicity, and other characteristics, including persons with disabilities.

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

Mandatory Board members may designate a single, high-ranking designee with decision-making authority from their organization to represent them at Board and committee meetings, except for Executive Committee meetings. Designees shall have the authority to vote on Board matters provided the Board has approved the designees' appointment.

ARTICLE III - MEETINGS OF THE BOARD

1. Regular Meetings. The Board shall hold regular meetings at least six times annually. One meeting shall serve as the Annual Meeting..

2. Special Meetings. Special meetings may be called by the Chairperson or by a majority of the members of the Board.

3. Place of Meeting. The Chairperson shall designate the place of meeting.

4. Notice of meeting. All meetings will be advertised to the general public. Written notice of the date, time and place of regular and special meetings shall be mailed to all members at least seven days before such meetings, together with an agenda of the business to be conducted.

If the Chairperson or a majority of the membership of the Board determines that an emergency situation requires that a special meeting be called, the seven-day notice requirement may be waived.

5. Quorum. A majority of the membership qualified and sitting shall constitute a quorum for the transaction of business at meetings of the Board, including those members teleconferencing.

6. Voting. All matters before the board (excepting amendments to Bylaws) shall be determined by a majority vote of members present at the meeting with a quorum present. Whenever a conflict of interest exists, or is thought to exist, same shall be declared in an open meeting to the entire Board or committee, by the member having such conflict, and the member shall abstain from voting as is provided herein.

7. Conflict of Interest. A Board member shall not cast a vote on, nor participate in any decision-making capacity on, the provision of services by such member (or any organization which that member directly represents), nor on any matter which would provide any direct financial benefit to that member.

The officers, employees, or agents of the agency making the award will neither solicit nor accept gratuities or anything of monetary value from contractors, potential contractors or parties to sub-agreements.

8. Procedure at Meetings.

a. Robert's Rules of Order shall govern the procedure of Board meetings except when inconsistent with provisions of the Bylaws.

b. All business shall be conducted in accordance with an agenda.

c. All business of the Corporation shall be conducted in accordance with the Florida government in Sunshine Law.

d. Board Members may teleconference into meetings three times per year unless authorized (July – June).

ARTICLE IV – OFFICERS

Chairperson. The Chairperson shall be the chief elected officer of the corporation and shall preside at all Board and Executive Committee meetings. The Chairperson shall appoint

committees and committee chairpersons, shall serve as an ex-officio member of all standing committees and shall perform such other duties as set forth in the Bylaws or as determined by the Corporation. The chairperson shall be a private sector representative.

2. Vice Chairperson. The Vice Chairperson shall, in the absence of the Chairperson, or in the event of his or her inability, perform the duties of the Chairperson and shall perform such other duties as are assigned by the Chairperson. The Vice Chairperson shall be a private sector representative.

3. Treasurer. The Treasurer shall be responsible for the review of all funds received and disclosed by the Board. Such funds shall be kept on deposit in financial institutions or invested in a manner approved by the Board. Checks are to be signed by the President/CEO and at least one other officer. The Treasurer shall cause a quarterly financial report to be made to the Executive Committee. The Treasurer may be a private or public sector representative.

4. President/CEO. The President/CEO shall be the chief administrative and executive officer. The President/CEO shall serve as secretary to the Board and cause to be prepared notices, agendas, minutes of the meetings of the Board and committees and shall maintain the corporate books and records as required by law.

The President/CEO shall be a non-voting member of the Board, executive committee and all committees.

The President/CEO shall serve as advisor to the chairperson and all committee chairpersons and shall assemble information and data and cause to be prepared special reports as directed by the Board.

The President/CEO shall be responsible for hiring, discharging, directing, supervising and setting compensation for all employees.

With the cooperation of the Treasurer, the President/CEO shall be responsible for the preparation of an operating budget covering all activities of the Corporation, subject to approval by the Board. The President/CEO shall further be authorized to make disbursements with approved budget allocations.

The President/CEO shall be chosen by the Executive Committee of the Corporation with the ratification of the Board by majority vote by a properly called meeting. The President/CEO shall report directly to the Executive Committee, who shall maintain supervisory control to the extent necessary and practical.

5. Qualifications. All officers elected after the first annual meeting of the corporation must have been a member of the Board for at least one (1) year prior to being elected to office.

6. Election. The Chairperson, Vice Chairperson and Treasurer shall be elected annually by the membership and shall serve a one-year term commencing July 1. The Chairperson's and the Vice Chairperson's terms shall be limited to two (2) terms, and the Treasurer shall be limited to four (4) terms, The terms of the officers are limited to two (2) terms consecutively in the same office. There are no limitations on the number of terms not in sequence or in different offices.

ARTICLE V - COMMITTEES

1. Executive Committee. The Executive Committee shall be composed of the Chairperson, Vice Chairperson, Treasurer, Immediate Past Chairperson, and such other members of the Board as are appointed by the Chairperson for a one-year term. The Executive Committee shall serve as a committee with administrative oversight responsibilities and is empowered to act and take necessary interim action to implement the plans and programs of the Corporation between

meetings of the Board. All restricted assets of the Corporation shall be managed by the Executive Committee of the Board. An Executive Committee report will be made at each Board meeting at which time the actions of the Executive Committee may be reviewed and ratified by the Board.

The Executive Committee shall assist the Treasurer with financial review responsibilities and shall review the President/CEO's recommended budget and make recommendations, regarding the budget to the Board. The annual audit will be reviewed by the Executive Committee at their first meeting after December 30 when the audit will be available.

If the Chairperson or a majority of the membership of the Board or Executive Committee determines that an emergency situation requires that a special meeting be called, the meeting may be called immediately and the requirement to advertise to the public can be waived.

2. Standing Committees. The Chairperson may establish additional committees, appoint the committee Chairpersons and specify their functions. Such committees shall not have the authority to act for the Board but may review issues or programs and make appropriate recommendations to the Board. Committee membership may include designees or non-Board members provided that the Chairperson and Vice Chairperson are Board members.

3. Ad Hoc Committees. Ad Hoc Committees shall consist of no more than five members of the Board and shall terminate upon completion of the matter of concern for which it was appointed. Membership of Ad Hoc Committees may include designees or non-Board members provided that the Chairperson and Vice Chairperson are Board members.

4. Committee Chairpersons. The committee Chairperson shall be appointed by the Board Chairperson. Each Committee Chairperson shall appoint a Committee Vice Chairperson from the Board members of that committee who will perform the duties of the Chairperson in his or her absence.

5. All committee meetings shall be advertised to the public and held in a location open and accessible to the public.

6. Committees may meet via teleconferencing.

ARTICLE VI - INDEMNIFICATION

The Board shall indemnify, defend, save and hold harmless each member from personal liability, to the maximum extent authorized by law as same may exist from time to time. It is specifically understood that each member is serving in a volunteer capacity and without compensation. It is the intent of this Article that no member shall have personal liability for his or her acts or omissions except in those instances where the Board is prohibited, by law, from indemnifying, defending, saving and holding harmless such member.

ARTICLE VII - AMENDMENTS TO BYLAWS

The Bylaws may be altered, amended or repealed and new Bylaws adopted by the affirmative vote of a two-thirds (2/3) majority of the membership of the Board in attendance at any meeting, provided that any proposal to alter, amend or repeal Bylaws must be submitted to each Board member at least seven days prior to the meeting at which the proposal is to be considered.

CareerSource RESEARCH COAST

AGENDA ITEM #6

AGENDA ITEM SUMMARY

TITLE: Other Business

ACTION: Information Only

SUPPORTING MATERIALS: CSRC Annual Performance Report for PY 2018 – 2019
DEO Presentation – CSRC Performance Overview for PY 2018 - 2019

CONTACT: Brian Bauer, President/CEO
bbauer@careersourcerc.com 866-482-4473 ext. 418

Annual Performance Report as a Direct Provider of Workforce Services

CareerSource Research Coast (CSRC), the Local Workforce Development Board serving Indian River, St. Lucie and Martin Counties (LWDB 20), has operated as the direct provider of workforce services since January 1, 2009. In the Direct Services Model, CSRC has reduced costs, improved operations and improved the image of the local career center system. The actual reduction in costs by providing services rather than contracting services to another provider for the Program Year 2017-2018 was $636,363.83 and for the Program Year 2018-2019 was $580,280.28.

The number of individuals served at CSRC Career Centers during Program Year 2018-2019 was 12,634. The number of services provided to career seekers was 102,837. As a result, 3398 career seekers were placed in jobs.

CSRC has met and/or exceeded the State's Individual Training Account (ITA) Expenditure Requirement each year since enactment. The amount spent on WIOA Adult/ Dislocated Worker Training programs to include On-the-Job Training (OJT), Individual Training Account (ITA), Job Readiness and Customized Training was $504,305.00. CSRC continues to improve performance, meet and exceed goals as measured by State and Federal Standards. For the past six years, CSRC has met and exceeded the Federal/State Workforce Common Measures/Indicators of Performance.

HIGHLIGHTS

Welfare Transition Program (WTP)
Eighty-seven WTP participants entered employment at an average wage of $11.26 per hour. This calculates to annual earnings of $2,037,610 contributing to our local economy.

Supplemental Nutrition Assistance Program (SNAP)
Forty-three SNAP participants entered employment at an average wage of $10.04 per hour. This calculates to earnings of $814,444.80 contributing to our local economy.

Workforce Innovation & Opportunity Act (WIOA)
Two hundred eighteen individuals who received training services through the WIOA program entered employment at an average wage of $18.54 per hour. This calculates to earnings of $8,406,694.40 contributing to the local economy. For the Program Year 2018-2019, eighty-six new WIOA participants were placed in classroom training at an average cost of $2,777.55 contributing to the investment in classroom training to $238,869.20

Community Based Sector Strategy Training Grant Projects

Pharmacy Technician Apprenticeship - CareerSource Heartland and CareerSource Research Coast, in collaboration and in partnership with CVS Health, are working together to register and expand CVS Health's Pharmacy Technician Apprenticeship to both Local Workforce Development Areas (LWDAs). The national Pharmacy Technician Apprenticeship Standards were revised to conform to FL apprenticeship guidelines and were approved by the FL Dept. of Education Office of Apprenticeship. The goals of this initiative are to train a total of twenty-two individuals, seven from CareerSource Heartland and fifteen from CareerSource Research Coast.

Healthcare - Seventeen of the twenty grant-funded Registered Nursing (RN) students/participants who were enrolled at Indian River State College under the Community-Based Sector Strategy (CBSS) Training Initiative have completed the program. Two participants were deferred for one semester due to health reasons and will utilize WIOA state level funding to complete their training and attain their Associate degrees and credentials in December 2019. All twenty students funded with WIOA formula funding as an in-kind contribution to the project have completed the program. Videos and promotional materials, available to local and state-wide healthcare industry stakeholders, demonstrate how the CBSS Training Initiative positively affected the shortage of RNs in LWDA 20.

Manufacturing Apprenticeship – After consulting with the State Office of Apprenticeship and the Treasure Coast Manufacturing Association, CSRC will take over the role as "Sponsor" of the Industrial Manufacturing Technician (IMT) Registered Apprenticeship program, and members of the manufacturing association will continue to serve in the "Apprenticeship Committee" role to ensure that service delivery aligns with industry needs. CSRC is committed to using registered apprenticeships as a key strategy to build a pipeline of skilled workers to help businesses throughout LWDA 20. CSRC will target underrepresented population and create a plan for outreach, recruitment, assessment, case management, related technical training, work-based training, and supportive services in the manufacturing sector. Twenty-eight Apprentices were registered in the IMT Registered Apprenticeship Program as of 6/30/19 and eighteen are expected to be completing the eighteen-month program in November 2019.

Pathways to Prosperity Grant Projects

Pre-Apprenticeship – Part of assuming the role of Sponsor for the IMT Registered Apprenticeship Program also includes the corresponding Pre-Apprentice Program that was implemented to support the corresponding IMT Registered Apprenticeship Program.

Eighteen Pre-Apprentices comprised of nine youth and nine adult participants are active in the program and have completed all of the required curriculum towards their Certified Production Technician (CPT) Certification. Five of the Pre-Apprentices passed all exams and earned the CPT Certificate. The Corporate and Career Training Institute at Indian River State College will continue to assist those needing to retest and eventually earn certification. Two of the Pre-Apprentices have been hired by a manufacturer, EB Airfoils, Inc., and have been enrolled into the IMT Registered Apprenticeship Program. The other Pre-Apprentices will have preferential status, along with Veterans, when applying for the ongoing IMT Registered Apprenticeship Program.

Families Ascending Towards Economic Success (F.A.T.E.S) Demonstration Project (2Gen) - As a strategy to meet CareerSource Florida's goal of reducing welfare, CSRC applied for and received a Pathways to Prosperity Grant to assist thirty low income families in Martin and St. Lucie Counties with mitigating fiscal cliffs by providing access to career pathways training opportunities.

In PY18-19, CSRC served five individuals under the FATES 2GEN Grant Project and spent a total of $14,165. One participant completed an On the Job Training in May 2019 and is on the three-year payment phase-out plan subsidized by the FATES 2GEN Project. Three participants received tuition costs for the Licensed Practical Nursing (LPN) program at the Treasure Coast Technical Center and are anticipated to graduate in December 2019. One participant received tuition costs for the Registered Nurse Program at Keiser university and graduated in September 2019.

Apprenticeship Expansion Grant Projects

Manufacturing Boot Camp - CSRC, the Indian River County Economic Development Council and area manufacturers collaborated with Treasure Coast Technical College to develop a one-week manufacturing boot camp to serve underrepresented population of Indian River County and provide a mechanism for marketing apprenticeship opportunities available locally.

The boot camp included tours at local manufacturing sites, hands-on activities, and soft skills to build a foundation on the benefits of a career path in manufacturing. Although there were spots for twelve, only eight participated in the event with the opportunity to move directly into the IMT Registered Apprenticeship, earning while they learn. Two of the participants have been hired by Aluma Tower Company and will be entering the IMT Registered Apprenticeship Program. One was accepted into the Piper Aircraft in-house apprenticeship.

CNC Production Specialist Certification – In LWDA 20, many manufacturers continue to struggle to find qualified workers with computer numerical control (CNC) training or experience to fill open positions. This grant allows CSRC to incorporate the CNC Production Specialist Certification Training to the Industrial Manufacturing (IMT) Registered Apprenticeship. Addition of a CNC certification to the program benefits the scaling of the apprenticeship model to our current participating manufacturers, and to new employer partners interested in sponsoring an apprentice. This project is scheduled to start November 2019.

Veteran's Services

CSRC served 770 veterans throughout the LWDA, providing 10,747 services to those veterans resulting in 326 veterans entering employment. CSRC held its annual event for homeless veterans, The Treasure Coast Homeless Veteran Stand Down and partnered with federal, state and local entities to provide services to this special group of veterans. The event was held indoors and structured to make it easy to receive services along with areas designated for privacy if needed. Some of the services included free transportation to and from the event, legal assistance, housing assistance, mental health, dental screenings, Social Security services, Veterans Administration services, haircuts, warm showers and hot meals. Clothing and supplies including backpacks, toiletries, and blankets were also provided.

CSRC hosted the Paychecks for Patriots Hiring Event on November 7th, a special hiring event for veterans and their families. The event was held concurrently in each Career Center and was attended by a total of sixty veterans and twenty employers.

Migrant Seasonal Farmworker Program (MSFW)

For the 2018-2019 program year, CSRC made 2,581 contacts with migrant seasonal farmworkers. Two hundred and three participants were placed in jobs.

Business & Employer Services

During the 2018-2019 program year, CSRC provided 21,501 services to 1,019 employers and continued to focus on sector strategies, with Manufacturing, Healthcare, Skilled Trades, and Logistics as the targeted industries.

In collaboration with partners and community stakeholders, CSRC conducted two major job fairs during the program year with 800+ career seekers in attendance. In total, CSRC also conducted over thirty specific recruitment events for area employers.

WIOA Youth

CSRC contracted with Eckerd Connects, through a sub-recipient agreement, to provide WIOA Youth Programming for In-School (ISY) and Out-of-School (OSY) youth for Program Year 2018-2019. The "Youth Connections" program has proven to be a successful partnership with increased performance and improved services to youth in LWDA 20. The CSRC Youth Council meets quarterly to monitor the activities and quality of the WIOA Youth Program. The Youth Connections Team conducted fifty outreach events to recruit youth program participants over the course of the program year and offered 1,142 services to these youth participants. The Youth Connections Program exceeded the Federal/State Youth Performance Measures and placed 87 youth in work experience opportunities with earnings totaling $107,490.

The Youth Connections Program hosted the Jobs+ Fair at the Treasure Coast Mall on 10/15/18.

Youth Build – Since the beginning of the Youth Build project that began in January 2018 in partnership with Indian River State College, Habitat for Humanity and the Treasure Coast Builder's Association, fifty-five youth have been enrolled as Youth Build participants. As of June 30th, twenty-six youth have successfully completed the Youth Build training component, with nineteen still actively participating in training activities. Forty-five youth have successfully completed the Work Experience component and twenty-one youth successfully completed the entire Youth Build program, with fifteen exiting with positive WIOA outcomes.

Summer of Success St. Lucie County - Summer of Success St. Lucie County 2019 launched June 10, 2019. One hundred twenty-five participating youth attended the two-week Youth Employment Success Solutions (YESS) soft skills program and completed a six-week paid internship at one of fifteen participating worksites and earned a total of $185,790.72 in wages and incentives.

BEST PRACTICE

State of the Jobs Conference

On October 25th, CSRC hosted the inaugural State of Jobs Conference for the East Coast of Florida. The State of Jobs Conference (SOJC) provides students with career exploration tracks in their field of interest. Business leaders presented fifteen to thirty minutes of information related to their industry and provided the students with an opportunity to ask questions. The goal was for students to get the "real" facts of what it's like to work in three industry sectors tracks f including: Manufacturing, Healthcare, and Skilled Trades. The PY18-19 conference brought together 235 high school seniors from all three School Districts on the Research Coast. The Keynote Speaker for the event was Dr. Tiffany Sizemore-Ruiz, a graduate from Lincoln Park Academy.

Lincoln Park Career Pathways Initiative

Created in a partnership with St. Lucie County Economic Development Council, Indian River State College, Treasure Coast Manufacturers Association and CSRC, the Lincoln Park Career Pathway Initiative offers training to residents of Lincoln Park, an underrepresented and under-resourced community in Fort Pierce, FL. Through this partnership, residents of Lincoln Park have access to training in career pathway certifications in three targeted industries: healthcare, logistics, and manufacturing. Mentoring, employability skills training as well as employment opportunities at the completion of the training are made available to all participants. CSRC utilizes WIOA funds for all residents deemed eligible and suitable, while the Lincoln Park Career Pathways Initiative grant, funded by Allegany Franciscan Ministries of Florida (AFMFL), will cover costs for career training and supportive services for 168 Lincoln Park residents over a two-year period.

The Lincoln Park Common Good Career Pathways Initiative was presented as a best practice at the Annual Career Pathways Network (FCPN) Symposium held in Jensen Beach on January 16 – 18, 2019.

CareerSource Research Coast Performance Overview

Daniel Harper, *Department of Economic Opportunity*

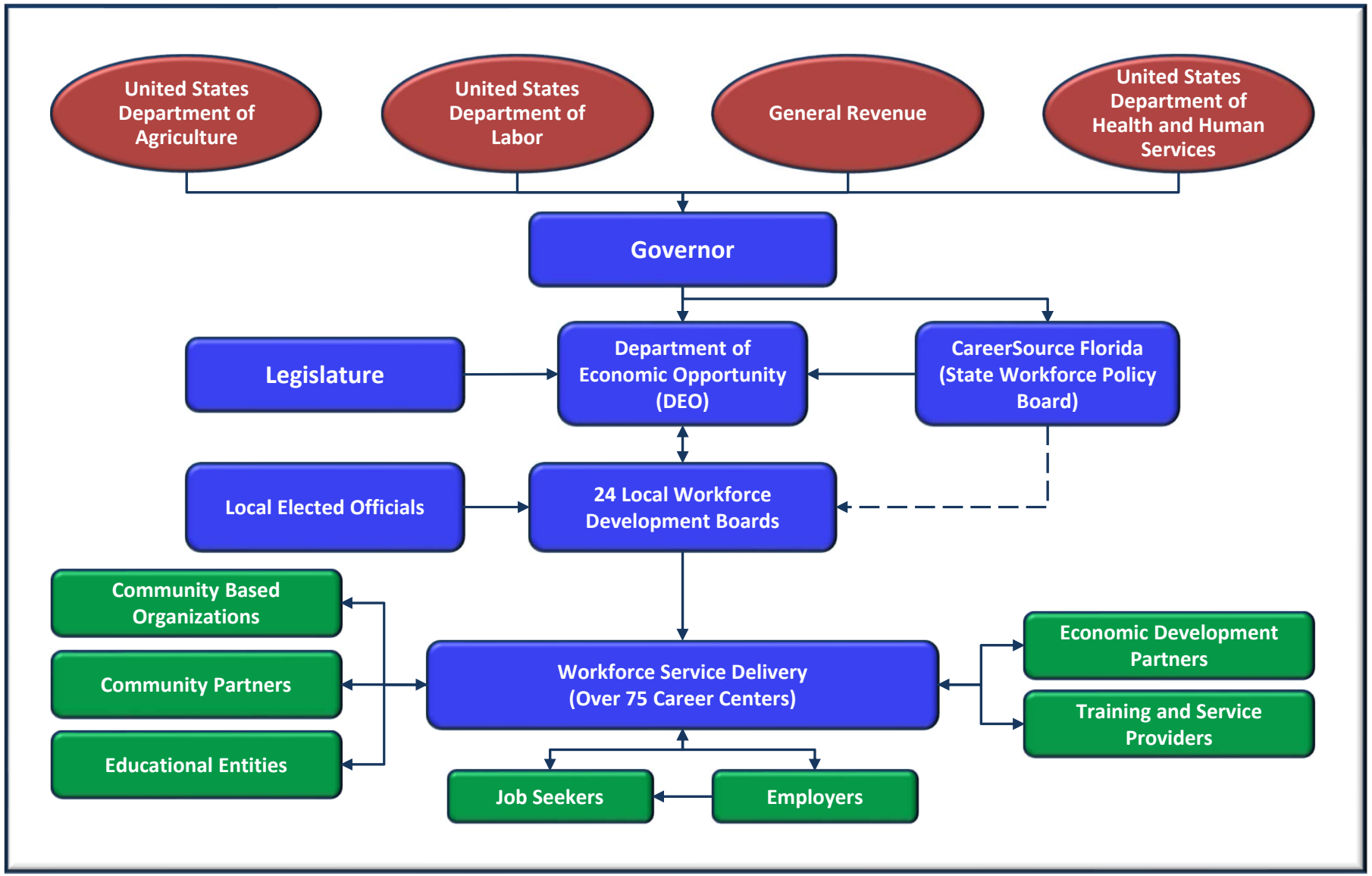
FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

January 29, 2020

AGENDA

- Workforce Structure and Service Delivery Model
- Roles and Responsibilities
- Program Year 2018 Primary Indicators of Performance
- United States Department of Labor (USDOL) Monitoring Activity
- Programmatic and Financial Monitoring Activity
- Local Area Financial Overview
- Apprenticeships

FLORIDA'S WORKFORCE SYSTEM



ROLES AND RESPONSIBILITIES

Local Elected Officials (LEO) Roles and Responsibilities

- Select the Chief Local Elected Official (CLEO)
- Assume liability for Workforce Innovation and Opportunity Act (WIOA) program funds
- Appoint the Local Workforce Development Board (LWDB) members
- Approve the LWDB-developed WIOA budget

ROLES AND RESPONSIBILITIES

CLEO/Board Joint Roles and Responsibilities

- Develop/submit the local WIOA plan
- Conduct oversight and monitoring of the One-Stop system, Youth Activities and Employment and Training Activities
- Set policy for WIOA activities and services consistent with state and federal policies
- Select One-Stop Operators
- Negotiate and reach agreement on local performance measures
- Respond to monitoring findings

PRIMARY INDICATORS OF PERFORMANCE

- WIOA establishes performance indicators and reporting requirements to assess the state's and local area's effectiveness in serving individuals participating in the workforce development system.
- Indicators consist of:
  - ✓ 4 Adult Indicators
  - ✓ 4 Dislocated Worker Indicators
  - ✓ 3 Youth Indicators
  - ✓ 3 Wagner-Peyser Indicators

WIOA PRIMARY INDICATORS OF PERFORMANCE

LWDA 20 Program Year (PY) 2018 July 1, 2018 – June 30, 2019	PY 2018 Actual Performance	PY 2018 Performance Targets	PY 2018 Achievement Level	PY 2019 Performance Targets
Adults:				
Employed 2nd Quarter After Exit	**95.50%**	**85.00%**	**112.35%**	**85.20%**
Employed 4th Quarter After Exit	**95.80%**	**82.50%**	**116.12%**	**83.00%**
Median Wage 2nd Quarter After Exit	**$10,331.00**	**$7,000.00**	**147.59%**	**$7,000.00**
Credential Attainment	**85.30%**	**63.00%**	**135.40%**	**66.00%**
Dislocated Workers:				
Employed 2nd Quarter After Exit	**100.00%**	**81.00%**	**123.46%**	**82.00%**
Employed 4th Quarter After Exit	**92.10%**	**78.00%**	**118.08%**	**79.00%**
Median Wage 2nd Quarter After Exit	**$8,627.00**	**$6,700.00**	**128.76%**	**$6,850.00**
Credential Attainment	**70.00%**	**65.00%**	**107.69%**	**68.00%**
Youth Common Measures:				
Education and Employment Rate 2nd Quarter After Exit	**85.10%**	**75.00%**	**113.47%**	**75.50%**
Education and Employment Rate 4th Quarter After Exit	**81.00%**	**69.00%**	**117.39%**	**69.20%**
Credential Attainment	**98.60%**	**75.20%**	**131.12%**	**75.50%**
Wagner-Peyser:				
Employed 2nd Quarter After Exit	**67.20%**	**63.00%**	**106.67%**	**63.20%**
Employed 4th Quarter After Exit	**64.90%**	**62.00%**	**104.68%**	**64.00%**
Median Wage 2nd Quarter After Exit	**$5,211.00**	**$4,850.00**	**107.44%**	**$5,000.00**

Not Met (less than 90% of target)
Met (90-100% of negotiated)
Exceeded (greater than 100% of negotiated)

USDOL Monitoring

In 2018 the USDOL conducted a comprehensive compliance review of two Local Workforce Development Boards. The findings in the report concluded that the State needed to further enhance its monitoring and training of Local Workforce Development Boards for the following areas.

- Firewalls and Internal Controls
- Board Recruitment, Vetting, Nomination, and Appointment Process
- Chief Elected Officials/Board Roles and Responsibilities
- Transparency and Sunshine Provisions
- LWDB Financial Management
- Key Program Compliance Elements

The initial USDOL report and subsequent responses can be found at the following link.

http://www.floridajobs.org/local-workforce-development-board-resources/program-monitoring-and-reports/2019-usdol-s-compliance-review-and-responses

As outlined in DEO's Corrective Action Plan, DEO will be working with the State and Local Workforce Development Boards on measures to increase the accountability and oversight of WIOA compliance requirements.

STATE MONITORING ACTIVITY

- Federal law requires the state to develop an oversight system to monitor all workforce programs receiving federal funds.
- DEO annually develops and implements a process for monitoring LWDBs.
- Programmatic and financial monitoring is completed annually
- Corrective Action Plans to address all findings are required.
- Starting in Program Year 2019-2020 programmatic and financial monitoring will be conducted concurrently.

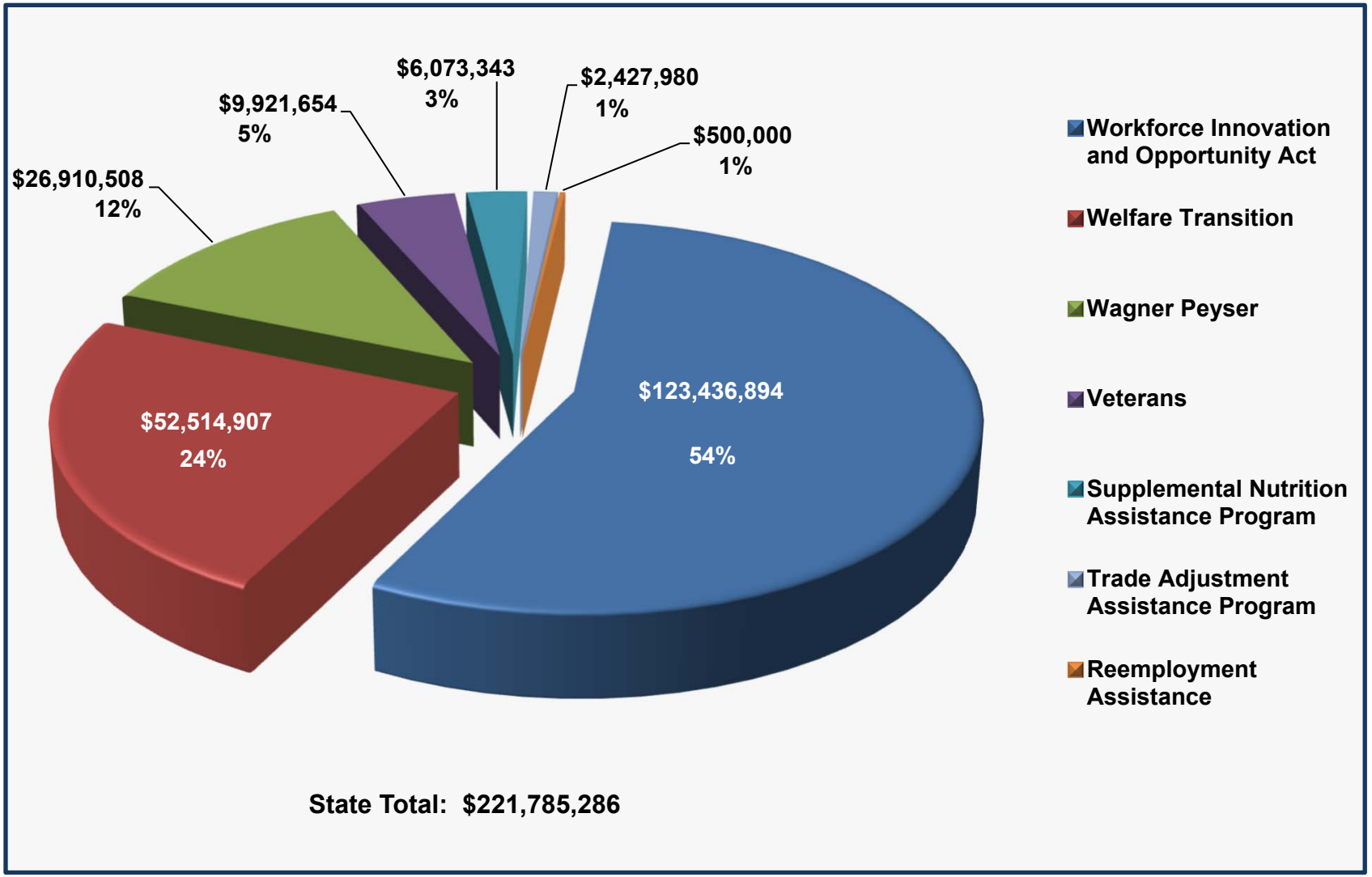
PROGRAM YEAR 2018 SUMMARY OF LOCAL FINDINGS

Program	PY 2018 Findings	PY 2019 Findings
Welfare Transition	1	1
Wagner-Peyser (RESEA, MSFW, Career Center Credentialing, MIS)	5	5
Supplemental Nutrition Assistance Program - Employment and Training	0	0
WIOA Adult / Dislocated Worker / Youth	0	0
Trade Adjustment Assistance Act	0	0
Total Findings	6	6

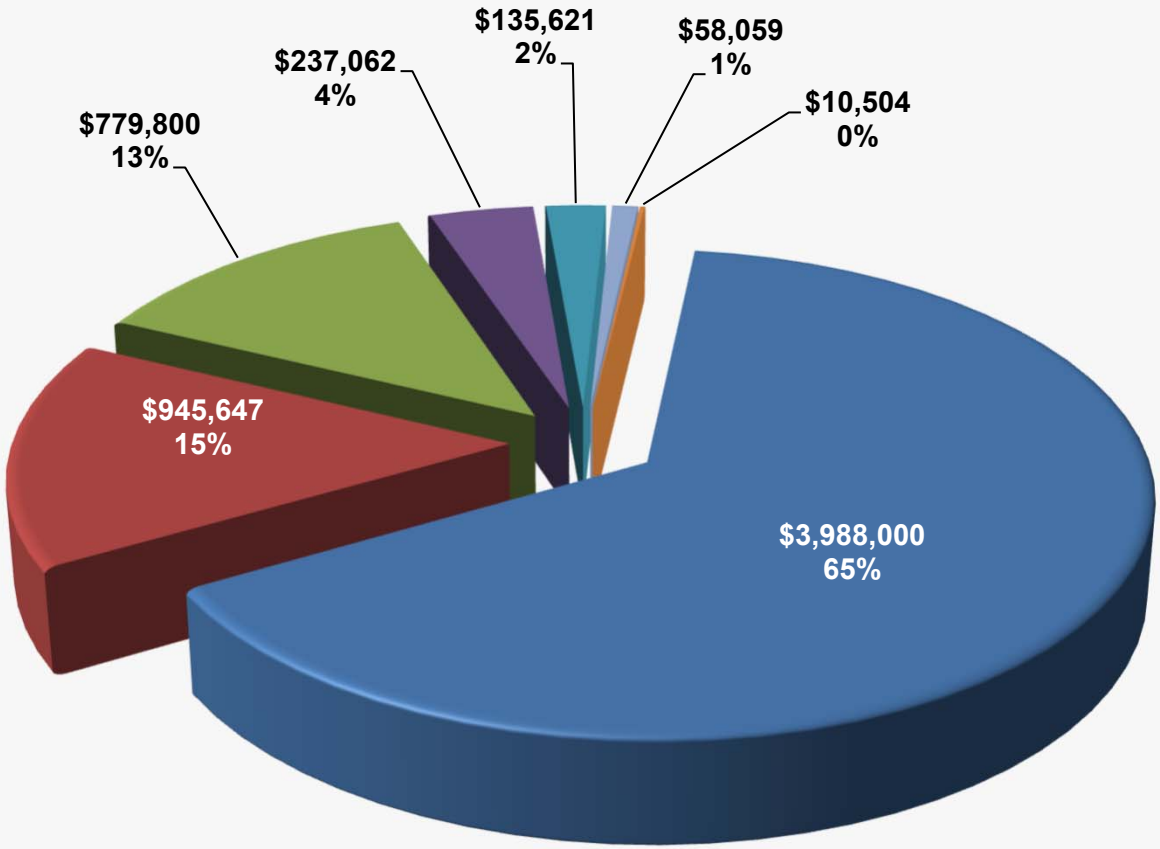
FISCAL YEAR 2018-19 SUMMARY OF THE RESULTS OF FINANCIAL MONITORING

CATEGORIES	RESULTS
Findings	None
Issues of Non-Compliance	None
Observations	None
Technical Assistance	1

PROGRAM YEAR 2019 TOTAL STATEWIDE FUNDING

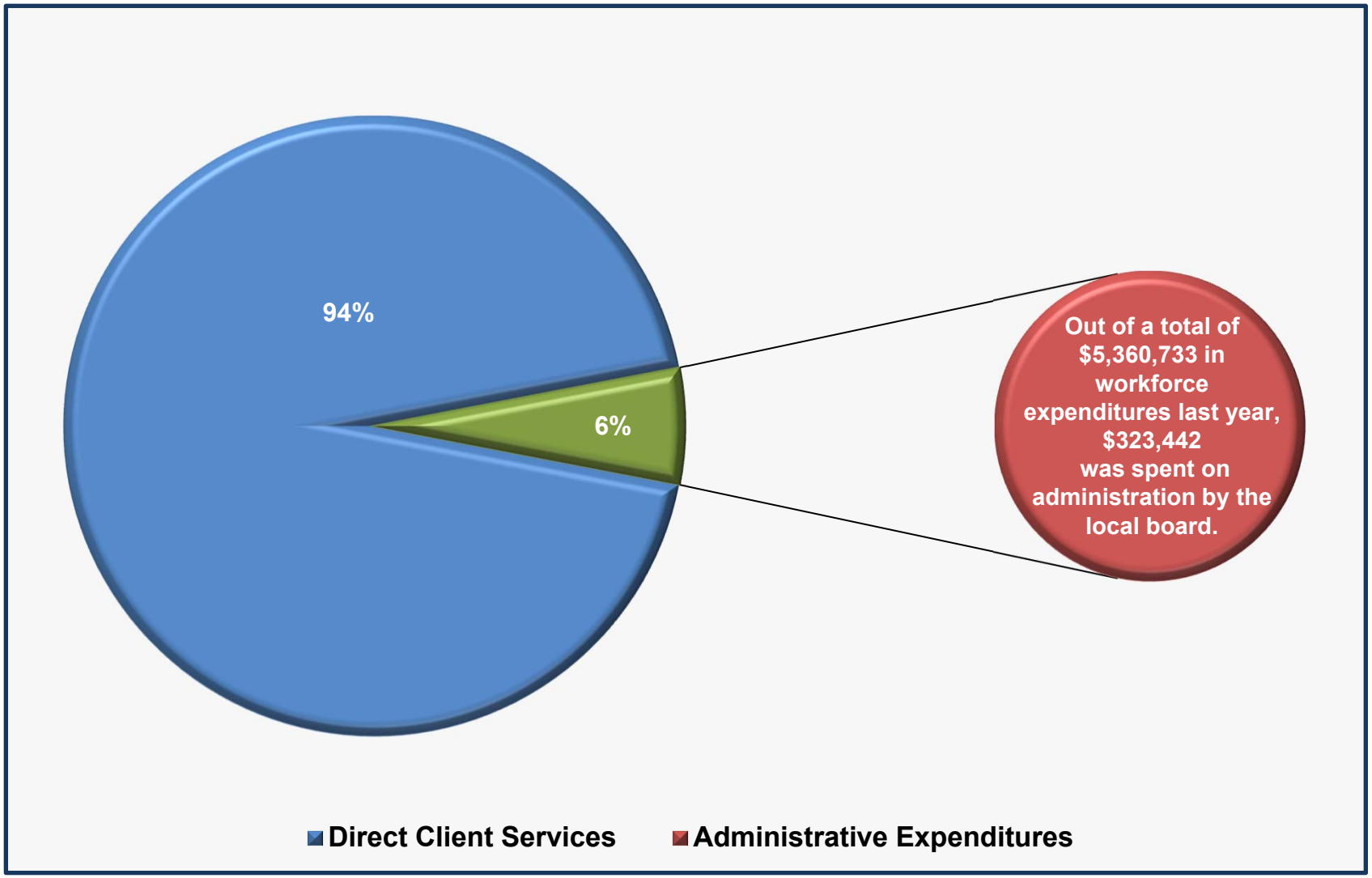


PROGRAM YEAR 2019 TOTAL LOCAL AMOUNT

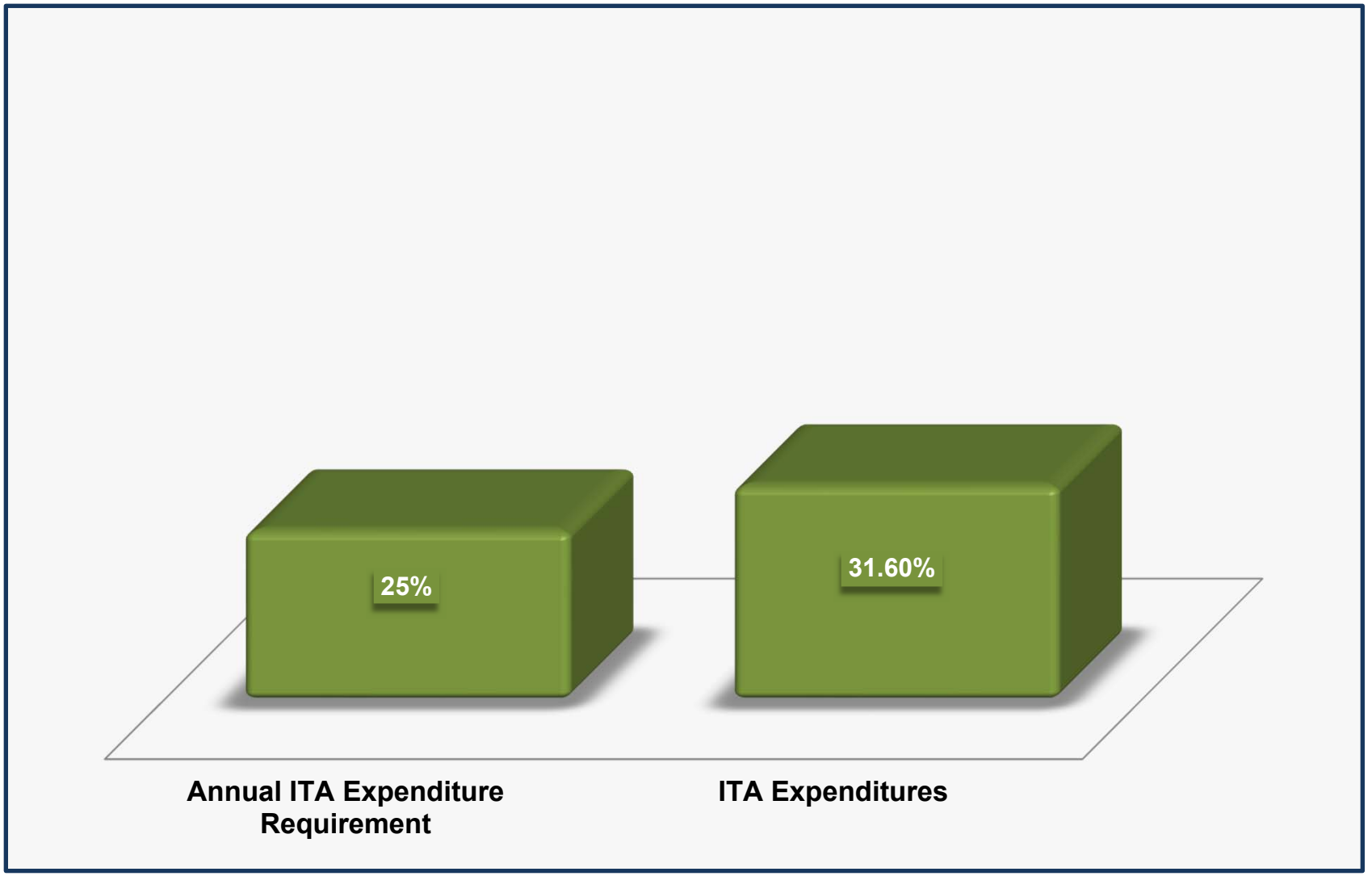


Local Total: $6,154,693

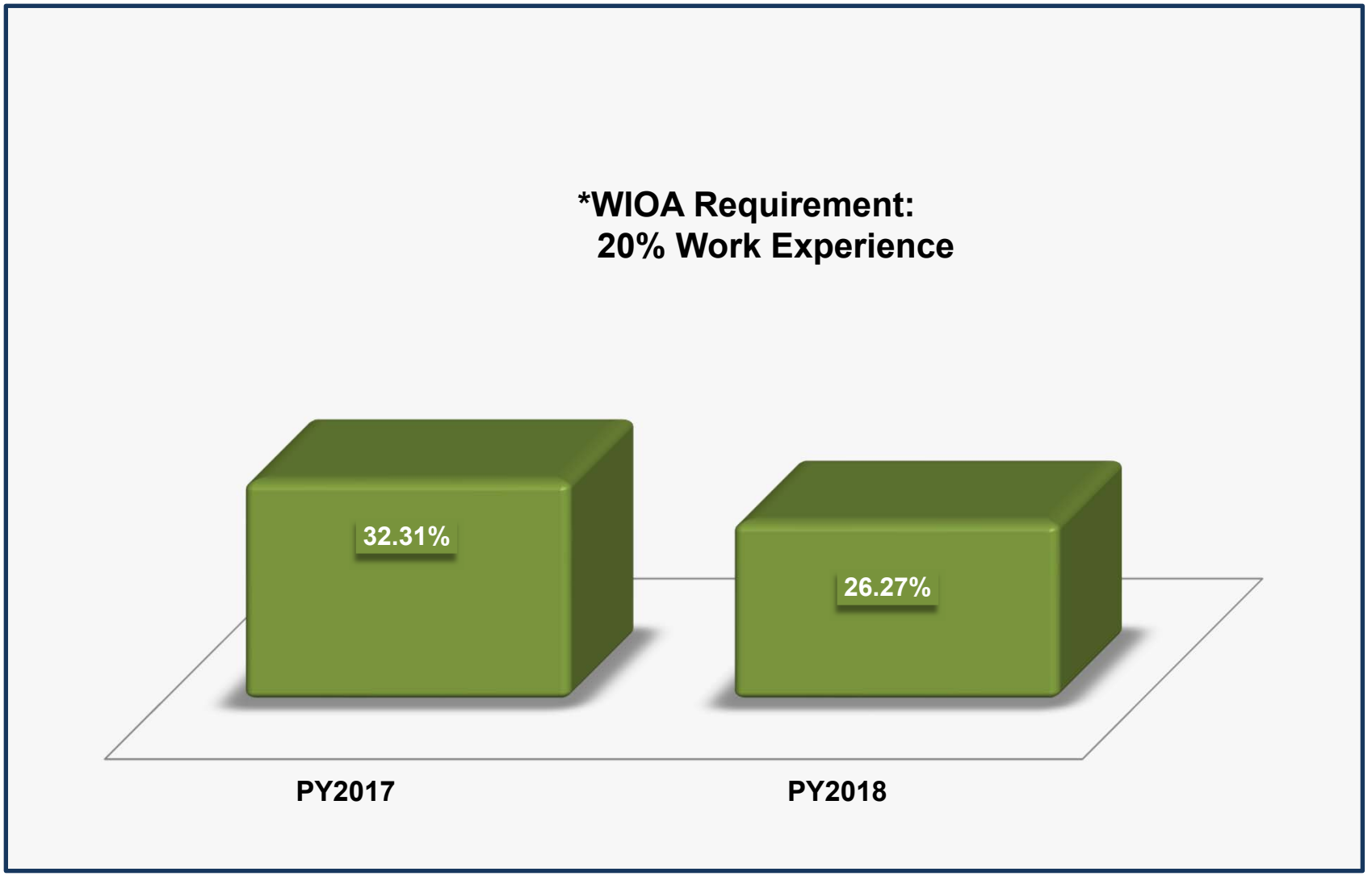
PROGRAM YEAR 2018 DIRECT CLIENT SERVICES & ADMINISTRATIVE EXPENDITURES



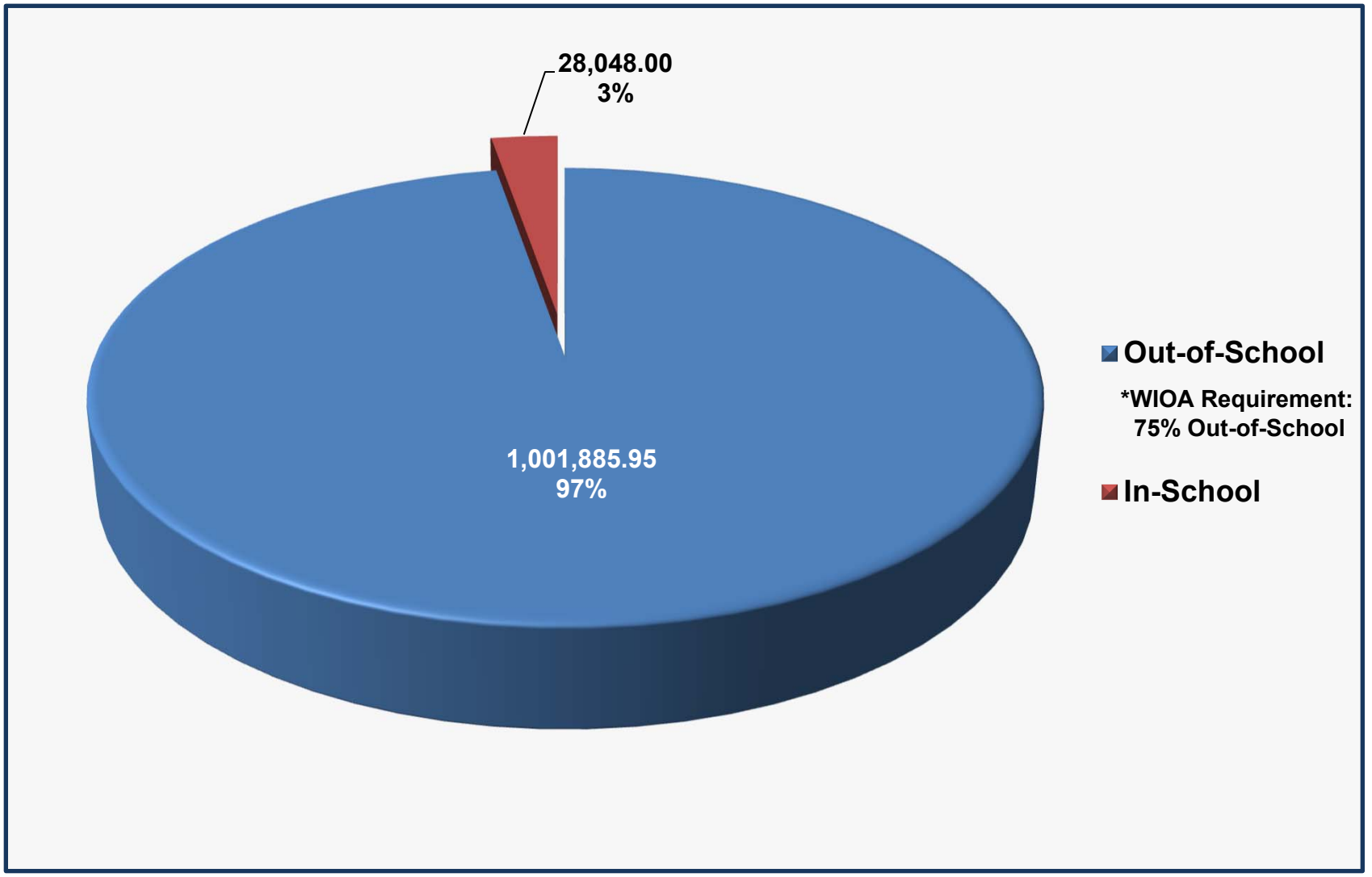
PROGRAM YEAR 2018 INDIVIDUAL TRAINING ACCOUNT EXPENDITURE REQUIREMENT



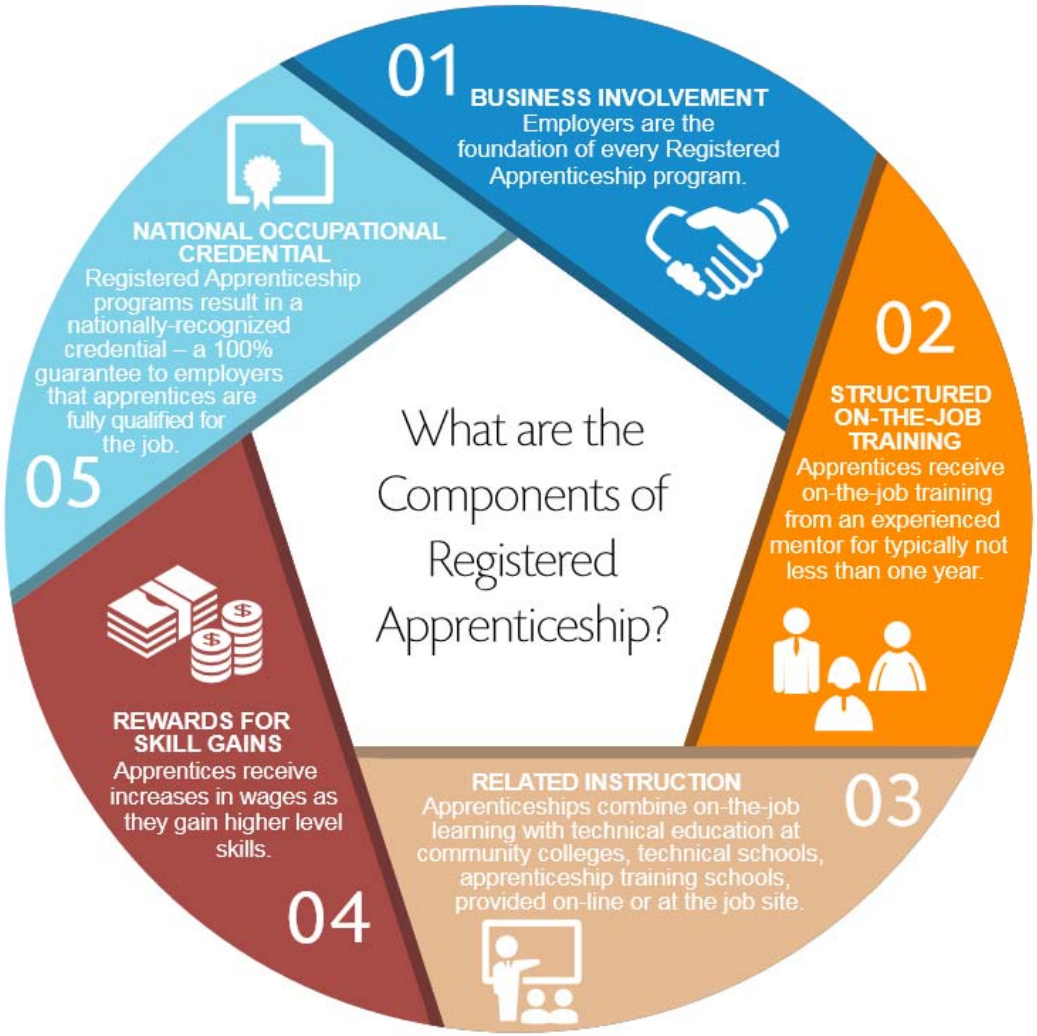
PROGRAM YEAR 2017 & 2018 WIOA WORK EXPERIENCE REQUIREMENT



PROGRAM YEAR 2018 PERCENTAGE OF EXPENDITURES ON OUT-OF-SCHOOL YOUTH



APPRENTICESHIPS



Source: Florida Department of Education

WORKFORCE TRENDS

National Registered Apprenticeship Results

Fiscal Year	Active Apprentices	New Apprentices	Total Completers	Active Programs	New Programs
2018	585,026	238,549	71,789	23,441	3,229

Fiscal Year 2018 State Totals

State Name	Active Apprentices	New Apprentices	Completers	Active Programs	New Programs
State Name	Active Apprentices	New Apprentices	Graduates	Active Programs	New Programs
Florida	12,207	5,233	1,500	221	22

Source: United States Department of Labor

QUESTIONS

ADDITIONAL INFORMATION

For more information, please contact:

Casey Penn

Florida Department of Economic Opportunity

One-Stop and Program Support

(850) 245-7485

Casey.Penn@deo.myflorida.com