

MEETING AGENDA

Meeting Details

Date: Friday, December 10, 2021

Time: 8:00 a.m.

Location: Administrative Office
584 NW University Blvd.
Suite 100
Port St. Lucie, FL 34986

Microsoft TEAMS Virtual Meeting Access

Access Code: 837 887 533#

Phone: 1-772-800-5467

URL: [Click here to join the meeting](#)

Opening Remarks

1. Welcome & Attendance
2. Declarations of Conflict of Interest

Voting Items

3. Review and Approve Financial Statements - September 30, 2021, and October 31, 2021
4. Review and Approve Universal - Priority of Service for Veterans and Eligible Spouses Policy
5. Review and Approve JVSG - Veteran Intake Policy
6. Review and Approve JVSG - Employment and Advocacy Services Policy
7. Review and Approve Universal - Internal Monitoring Policy
8. Review and Approve Universal - Collection of Demographic Information Policy
9. Review and Approve WIOA - Guidelines for Self Sufficiency Policy Revisions
10. Review and Approve WIOA - Incumbent Worker Training Policy Revisions
11. Review and Approve WT Program - Assigning Activities Policy Revisions
12. Review and Approve WT Program - Medical Incapacity Policy Revisions
13. Review and Approve Recommendation for One-Time Discretionary Bonus for Executive Team
14. Review and Approve Request for Proposal for One-Stop Operator

Information/Discussion

15. Other Business
 - a. Career Centers Extended Hours Pilot
 - b. CareerSource Research Coast - Staff Reorganization Update
16. Set Agenda Items for next Executive Committee Meeting - January 14, 2021
17. Adjournment

AGENDA ITEM SUMMARY

Title	Declarations of Conflict of Interest
Strategic	N/A
Plans/Goals	Public Law 105-220
Policy/Plan/Law	Information Only
Action Requested	In the event that a conflict of interest arises due to business or employment interests of associates or close family members, a Regional Workforce Development Board member would be required to reveal that conflict, to refrain from voting on the issue and to file a memorandum of voting conflict Commission Form 8B
Background	
Staff	
Recommendations	Conflict of Interest Statement Form
Supporting Material	8B Memorandum of Voting Conflict
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

collaborate.

innovate.

lead.

APPOINTED OFFICERS (continued)

- A copy of the form must be provided immediately to the other members of the agency.
 - The form must be read publicly at the next meeting after the form is filed.
- IF YOU MAKE NO ATTEMPT TO INFLUENCE THE DECISION EXCEPT BY DISCUSSION AT THE MEETING:
- You must disclose orally the nature of your conflict in the measure before participating.
 - You must complete the form and file it within 15 days after the vote occurs with the person responsible for recording the minutes of the meeting, who must incorporate the form in the minutes. A copy of the form must be provided immediately to the other members of the agency, and the form must be read publicly at the next meeting after the form is filed.

DISCLOSURE OF LOCAL OFFICER'S INTEREST

I, _____, hereby disclose that on _____, 20: ____

A measure came or will come before my agency which (check one)

- inured to my special private gain or loss;
- inured to the special gain or loss of my business associate, _____;
- inured to the special gain or loss of my relative, _____;
- inured to the special gain or loss of _____, by whom I am retained; or
- inured to the special gain or loss of _____, which is the parent organization or subsidiary of a principal which has retained me.

(b) The measure before my agency and the nature of my conflicting interest in the measure is as follows

Date Filed

Signature

NOTICE: UNDER PROVISIONS OF FLORIDA STATUTES §112.317, A FAILURE TO MAKE ANY REQUIRED DISCLOSURE CONSTITUTES GROUNDS FOR AND MAY BE PUNISHED BY ONE OR MORE OF THE FOLLOWING: IMPEACHMENT, REMOVAL OR SUSPENSION FROM OFFICE OR EMPLOYMENT, DEMOTION, REDUCTION IN SALARY, REPRIMAND, OR A CIVIL PENALTY NOT TO EXCEED \$10,000.

AGENDA ITEM SUMMARY

Title	Financial Statements - September 30, 2021, and October 31, 2021
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA) - Role of LWDB's
Action Requested	Review and Approve Financial Statements - September 30, 2021, and October 31, 2021
Background	The Board approved the budget for PY 2021-2022. The Executive Committee regularly reviews budgets, all amendments to the budget, and monthly expenditures.
Staff Recommendations	Review and Approve Financial Statements - September 30, 2021, and October 31, 2021
Supporting Material	Financial Statements - September 30, 2021, and October 31, 2021
Board Staff	Lisa Delligatti CFO ldelligatti@careersourcerc.com (866) 482-4473 ext. 430

LWDB 20
Summary of Funding and Expenditures
As of September 30, 2021

PY 21-22 TOTAL AVAILABLE FUNDING	INDIRECT	10 ADULT	12 DW	11 YOUTH	102 WIOA PI	122 Florida Rebuild	20 WP	22 SNAP	24 LVER	25 DVOP	282 TAA
PY 21-22 Allocations		\$ 1,085,046	\$ 919,374	\$ 964,333	\$ -	\$ 32,721	\$ 743,943	\$ 171,957	\$ 252,197	\$ 173,093	\$ 102,011
PY 21-22 Supplemental		\$ -	\$ 140,749	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ (319,065)	\$ -	\$ (179,522)	\$ (116,207)	\$ (22,711)
Carryforward to PY 22-23		\$ -	\$ (509,645)	\$ (270,415)	\$ -	\$ -	\$ (199,949)	\$ (21,564)	\$ (7,895)	\$ (4,048)	\$ (103,218)
Carryforward from PY 20-21		\$ -	\$ 1,157,134	\$ 478,481	\$ 66,247	\$ -	\$ 106,915	\$ 22,535	\$ 17,232	\$ 11,328	\$ 75,268
TOTAL	\$ -	\$ 1,085,046	\$ 1,707,612	\$ 1,172,399	\$ 66,247	\$ 32,721	\$ 331,844	\$ 172,928	\$ 82,012	\$ 64,166	\$ 51,350
FUNDING DRAWN DOWN YTD											
	INDIRECT	10 ADULT	12 DW	11 YOUTH	102 WIOA PI	122 Florida Rebuild	20 WP	22 SNAP	24 LVER	25 DVOP	282 TAA
PY 21-22 Allocations		\$ 125,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
PY 21-22 Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 22-23		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 20-21		\$ -	\$ 467,884	\$ 171,235	\$ 11,582	\$ -	\$ 106,915	\$ 22,535	\$ 24,016	\$ 17,014	\$ 15,658
TOTAL		\$ 125,000	\$ 467,884	\$ 171,235	\$ 11,582	\$ -	\$ 106,915	\$ 22,535	\$ 24,016	\$ 17,014	\$ 15,658
% of Total Budgeted Funding Received		11.52%	27.40%	14.61%	17.48%	0.00%	32.22%	13.03%	29.28%	26.52%	30.49%
EXPENDITURES											
Administrative	\$ -	\$ 1,749	\$ 30,125	\$ 4,579	\$ 3,655	\$ -	\$ 10,159	\$ 5,437	\$ 973	\$ 736	\$ 56
Salaries and Benefits	\$ 89,923	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 51,042	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (140,965)	\$ 40,697	\$ 2,636	\$ 4,579	\$ 197	\$ -	\$ 2,159	\$ 5,437	\$ 973	\$ 736	\$ 56
Reclassification		\$ (38,948)	\$ 27,489	\$ -	\$ 3,458	\$ -	\$ 8,000	\$ -	\$ -	\$ -	\$ -
Travel		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ 24,293	\$ 335,248	\$ 247,643	\$ 7,944	\$ -	\$ 96,756	\$ 55,580	\$ 18,201	\$ 13,638	\$ 1,644
WIOA Youth Contracts		\$ -	\$ -	\$ 204,871	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 44,156	\$ 259,819	\$ 14,805	\$ 5,570	\$ -	\$ -	\$ 11,773	\$ 36,706	\$ 3,490	\$ 2,569	\$ 254
Contract Labor	\$ -	\$ 3,795	\$ 177	\$ -	\$ -	\$ -	\$ 107	\$ 569	\$ 58	\$ 44	\$ 2
Internship		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services ITA		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA		\$ 22,317	\$ 3,652	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-OJT		\$ 1,510	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 474	\$ 1,270	\$ 365	\$ 314	\$ -	\$ -	\$ 110	\$ 669	\$ 349	\$ 440	\$ 1
One Stop Shared Costs		\$ 54,650	\$ 2,122	\$ -	\$ -	\$ -	\$ 18,634	\$ 8,728	\$ 12,978	\$ 9,605	\$ 1,318
Other Operating Expenses	\$ 9,426	\$ 46,881	\$ 4,268	\$ 20,134	\$ 7,868	\$ -	\$ 7,594	\$ 6,822	\$ 953	\$ 698	\$ 47
Allocated Program Indirect	\$ (54,056)	\$ 15,606	\$ 1,011	\$ 1,756	\$ 75	\$ -	\$ 828	\$ 2,085	\$ 373	\$ 282	\$ 22
Reclassification		\$ (381,556)	\$ 308,848	\$ 14,998	\$ -	\$ -	\$ 57,711	\$ -	\$ -	\$ -	\$ -
Total Expenditures	\$ 0	\$ 26,043	\$ 365,373	\$ 252,222	\$ 11,599	\$ -	\$ 106,915	\$ 61,017	\$ 19,174	\$ 14,374	\$ 1,700
Funding Over/(under) expenditures	\$ 0	\$ 98,957	\$ 102,511	\$ (80,987)	\$ (17)	\$ -	\$ -	\$ (38,482)	\$ 4,842	\$ 2,640	\$ 13,958
YTD % of Budgeted Funds Expended		2.40%	21.40%	21.51%	17.51%	0.00%	32.22%	35.28%	23.38%	22.40%	3.31%

LWDB 20
Summary of Funding and Expenditures
As of September 30, 2021

PY 21-22 TOTAL AVAILABLE FUNDING	32 CNC Apprent Closed	39 DWG COVID-19	40 WTP	47 Manf Apprent Closed	470 Apprent Navigator	471 Sector Strategy	472 Sector Strategy	473 Recovery Navigator	474 Rapid Response Navigator	48 F.A.T.E.S.	49 Roof Truss Apprent Closed	792 Youth SOS SLC	793 Youth SOS MC	Other Non NFA
PY 21-22 Allocations		\$ -	\$ 1,063,369		\$ -	\$ -	\$ -	\$ -	\$ 140,749	\$ -		\$ -	\$ -	\$ -
PY 21-22 Supplemental		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -
Unrestricted Funds Earned this year		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	\$ 75,702
Additional Funds		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ 125,000		\$ 300,000	\$ 45,000	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -
Carryforward to PY 22-23		\$ -	\$ -		\$ -	\$ -	\$ -	\$ (137,926)	\$ (102,997)	\$ -		\$ -	\$ -	\$ -
Carryforward from PY 20-21		\$ 924,868	\$ -		\$ 42,820	\$ 74,192	\$ 183,356	\$ 260,870	\$ -	\$ -		\$ -	\$ -	\$ -
TOTAL	\$ -	\$ 924,868	\$ 1,063,369	\$ -	\$ 42,820	\$ 74,192	\$ 183,356	\$ 122,944	\$ 37,752	\$ 125,000	\$ -	\$ 300,000	\$ 45,000	\$ 75,702
FUNDING DRAWN DOWN YTD														
FUNDING DRAWN DOWN YTD	32 CNC Apprent Closed	39 DWG COVID-19	40 WTP	47 Manf Apprent Closed	470 Apprent Navigator	471 Sector Strategy	472 Sector Strategy	473 Recovery Navigator	474 Rapid Response Navigator	48 F.A.T.E.S.	49 Roof Truss Apprent Closed	792 Youth SOS SLC	793 Youth SOS MC	Other Non NFA
PY 21-22 Allocations	\$ -	\$ -	\$ 198,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -
PY 21-22 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 37,857
Additional Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 80,075	\$ 1	\$ -
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 22-23	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 20-21	\$ -	\$ 382,868	\$ 17,111	\$ -	\$ 22,820	\$ 60,000	\$ 141,177	\$ 15,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ -	\$ 382,868	\$ 215,111	\$ -	\$ 22,820	\$ 60,000	\$ 141,177	\$ 15,000	\$ 5,000	\$ -	\$ -	\$ 80,075	\$ 1	\$ 37,857
% of Total Budgeted Funding Received	0.00%	41.40%	20.23%	0.00%	53.29%	80.87%	77.00%	12.20%	13.24%	0.00%	0.00%	26.69%	0.00%	50.01%
EXPENDITURES														
Administrative	\$ -	\$ 36,891	\$ 18,166	\$ -	\$ 1,614	\$ 2,618	\$ 9,994	\$ 1,082	\$ 331	\$ 1,210	\$ -	\$ 7,430	\$ 606	\$ 3,553
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ 9	\$ 36,891	\$ 18,166	\$ 37	\$ 1,614	\$ 2,618	\$ 9,932	\$ 1,082	\$ 331	\$ 1,210	\$ 15	\$ 7,430	\$ 606	\$ 3,553
Reclassification	\$ (9)	\$ -	\$ -	\$ (37)	\$ -	\$ -	\$ 62	\$ -	\$ -	\$ -	\$ (15)	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ 323,246	\$ 184,638	\$ -	\$ 16,590	\$ 25,929	\$ 91,490	\$ 9,355	\$ 3,323	\$ 10,464	\$ -	\$ 65,141	\$ 5,444	\$ 41,505
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 71	\$ 19,001	\$ 124,453	\$ 280	\$ 11,748	\$ 18,886	\$ 20,029	\$ -	\$ 2,221	\$ -	\$ 119	\$ 2,678	\$ 681	\$ 13,013
Contract Labor	\$ -	\$ 2,800	\$ 1,992	\$ -	\$ -	\$ 461	\$ 361	\$ 8,600	\$ -	\$ -	\$ -	\$ 5,266	\$ 836	\$ 1,261
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ 200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ 874	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,570	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 22,123	\$ -	\$ -	\$ 8,430	\$ -	\$ -	\$ -	\$ -
Training-OJT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 17,502	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 20,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ 280,412	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 53,085	\$ 3,413	\$ -
Travel	\$ -	\$ 82	\$ 1,154	\$ -	\$ 298	\$ 177	\$ 89	\$ 197	\$ 149	\$ -	\$ -	\$ 33	\$ -	\$ 390
One Stop Shared Costs	\$ 33	\$ 2,149	\$ 27,890	\$ 124	\$ 4,492	\$ -	\$ 5,659	\$ -	\$ -	\$ -	\$ 50	\$ -	\$ -	\$ 8,514
Other Operating Expenses	\$ 5	\$ 3,781	\$ 21,982	\$ 22	\$ 3,925	\$ 909	\$ 1,185	\$ 143	\$ 826	\$ -	\$ 8	\$ 1,229	\$ 281	\$ 16,964
Allocated Program Indirect	\$ 4	\$ 14,147	\$ 6,966	\$ 14	\$ 619	\$ 1,004	\$ 3,809	\$ 415	\$ 127	\$ 464	\$ 6	\$ 2,849	\$ 232	\$ 1,363
Reclassification	\$ (112)	\$ -	\$ -	\$ (440)	\$ -	\$ -	\$ 734	\$ -	\$ -	\$ -	\$ (182)	\$ -	\$ -	\$ -
Total Expenditures	\$ -	\$ 360,137	\$ 202,804	\$ -	\$ 18,203	\$ 28,548	\$ 101,483	\$ 10,437	\$ 3,654	\$ 11,674	\$ -	\$ 72,571	\$ 6,050	\$ 45,058
Funding Over/(under) expenditures	\$ -	\$ 22,731	\$ 12,308	\$ -	\$ 4,616	\$ 31,452	\$ 39,694	\$ 4,563	\$ 1,346	\$ (11,674)	\$ -	\$ 7,505	\$ (6,049)	\$ (7,201)
YTD % of Budgeted Funds Expended	0.00%	38.94%	19.07%	0.00%	42.51%	38.48%	55.35%	8.49%	9.68%	9.34%	0.00%	24.19%	13.44%	59.52%

LWDB 20
Summary of Funding and Expenditures
As of September 30, 2021

PY 21-22 TOTAL AVAILABLE FUNDING	YEAR TO DATE TOTALS			
PY 21-22 Allocations		\$	5,648,793	
PY 21-22 Supplemental		\$	140,749	
Unrestricted Funds Earned this year		\$	75,702	
Additional Funds		\$	470,000	
Retained by DEO for Merit Salaries		\$	(637,506)	
Carryforward to PY 22-23		\$	(1,357,657)	
Carryforward from PY 20-21		\$	3,421,248	
TOTAL	\$ -	\$	7,761,330	
FUNDING DRAWN DOWN YTD				
	PY 21-22 Actual	PY 21-22 Budget	VARIANCE	% Expended
PY 21-22 Allocations	\$ 328,000	\$ 5,648,793	\$ 5,320,793	5.807%
PY 21-22 Supplemental	\$ -	\$ 140,749	\$ 140,749	0.000%
Unrestricted Funds Earned this year	\$ 37,857	\$ 75,702	\$ 37,845	50.008%
Additional Funds	\$ 80,076	\$ 470,000	\$ 389,924	17.038%
Retained by DEO for Merit Salaries	\$ -	\$ (637,506)	\$ (637,506)	
Carryforward to PY 22-23	\$ -	\$ (1,357,657)	\$ (1,357,657)	
Carryforward from PY 20-21	\$ 1,475,817	\$ 3,421,248	\$ 1,945,432	43.137%
TOTAL	\$ 1,921,751	\$ 7,761,330	\$ 5,839,579	24.761%
% of Total Budgeted Funding Received	24.76%			
EXPENDITURES				
	PY 19-20 Actual	PY 19-20 Budget	BUDGET VARIANCE	% Expended
Administrative	\$ 140,965	\$ 726,767	\$ 585,802	19.40%
Salaries and Benefits	\$ 89,923	\$ 403,973	\$ 314,050	22.26%
General and Administrative	\$ 51,042	\$ 322,794	\$ 271,752	15.81%
Allocated Indirect Costs	\$ (0)	\$ (0)	\$ (0)	
Reclassification	\$ 0	\$ -	\$ 0	
Travel	\$ -	\$ -	\$ -	
Program Training	\$ 1,578,071	\$ 7,034,594	\$ 5,456,522	22.4%
WIOA Youth Contracts	\$ 204,871	\$ 1,000,000	\$ 795,129	20.5%
Salaries and Benefits	\$ 592,324	\$ 2,960,815	\$ 2,368,491	20.0%
Contract Labor	\$ 26,331	\$ 185,884	\$ 159,553	14.2%
Internship	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ 200	\$ 19,975	\$ 19,775	1.0%
Support Services Non-ITA	\$ 874	\$ 15,228	\$ 14,354	5.7%
Support Services ITA	\$ 1,570	\$ 23,935	\$ 22,365	6.6%
Training-ITA/OST/TAA	\$ 56,522	\$ 258,548	\$ 202,026	21.9%
Training-OJT	\$ 19,012	\$ 434,763	\$ 415,751	4.4%
Training-Cust./Employed Worker	\$ 20,000	\$ 101,000	\$ 81,000	19.8%
WEX/ Internships/ Participant Wages	\$ 336,911	\$ 815,951	\$ 479,040	41.3%
Travel	\$ 6,561	\$ 11,749	\$ 5,189	55.8%
One Stop Shared Costs	\$ 156,946	\$ 621,905	\$ 464,960	25.2%
Other Operating Expenses	\$ 155,951	\$ 584,840	\$ 428,889	26.7%
Allocated Program Indirect	\$ 0	\$ (0)	\$ -	
Reclassification	\$ 0	\$ -	\$ 0	
Total Expenditures	\$ 1,719,036	\$ 7,761,360	\$ 6,042,324	22.1%
Funding Over/(under) expenditures	\$ 202,715			
YTD % of Budgeted Funds Expended	22.15%			

LWDB 20
Summary of Funding and Expenditures
As of October 31, 2021

PY 21-22 TOTAL AVAILABLE FUNDING	INDIRECT	10 ADULT	12 DW	11 YOUTH	102 WIOA PI	122 Florida Rebuild	20 WP	22 SNAP	24 LVER	25 DVOP	282 TAA	32 CNC Apprent Closed	36 One Stop Security	39 DWG COVID-19	40 WTP	47 Manf Apprent Closed
PY 21-22 Allocations		\$ 1,085,046	\$ 919,374	\$ 964,333	\$ -	\$ 32,721	\$ 743,943	\$ 171,957	\$ 252,197	\$ 173,093	\$ 102,011	\$ -	\$ 67,320	\$ -	\$ 1,063,369	\$ -
PY 21-22 Supplemental		\$ -	\$ 140,749	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ (319,065)	\$ -	\$ (179,522)	\$ (116,207)	\$ (22,711)	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 22-23		\$ -	\$ (509,645)	\$ (270,415)	\$ -	\$ -	\$ (199,949)	\$ (21,564)	\$ (7,895)	\$ (4,048)	\$ (103,218)	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 20-21		\$ -	\$ 1,157,134	\$ 478,481	\$ 66,247	\$ -	\$ 106,915	\$ 22,535	\$ 17,232	\$ 11,328	\$ 75,268	\$ -	\$ -	\$ 924,868	\$ -	\$ -
TOTAL	\$ -	\$ 1,085,046	\$ 1,707,612	\$ 1,172,399	\$ 66,247	\$ 32,721	\$ 331,844	\$ 172,928	\$ 82,012	\$ 64,166	\$ 51,350	\$ -	\$ 67,320	\$ 924,868	\$ 1,063,369	\$ -
FUNDING DRAWN DOWN YTD																
FUNDING DRAWN DOWN YTD	INDIRECT	10 ADULT	12 DW	11 YOUTH	102 WIOA PI	122 Florida Rebuild	20 WP	22 SNAP	24 LVER	25 DVOP	282 TAA	32 CNC Apprent Closed	36 One Stop Security	39 DWG COVID-19	40 WTP	47 Manf Apprent Closed
PY 21-22 Allocations		\$ 125,000	\$ -	\$ -	\$ -	\$ -	\$ 40,000	\$ 60,375	\$ 6,784	\$ 7,686	\$ -	\$ -	\$ -	\$ -	\$ 265,842	\$ -
PY 21-22 Supplemental		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrestricted Funds Earned this year		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funds		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Retained by DEO for Merit Salaries		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward to PY 22-23		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Carryforward from PY 20-21		\$ -	\$ 592,884	\$ 236,235	\$ 11,599	\$ -	\$ 106,915	\$ 22,535	\$ 17,232	\$ 11,328	\$ 15,982	\$ -	\$ -	\$ 507,868	\$ 17,111	\$ -
TOTAL		\$ 125,000	\$ 592,884	\$ 236,235	\$ 11,599	\$ -	\$ 146,915	\$ 82,910	\$ 24,016	\$ 19,014	\$ 15,982	\$ -	\$ -	\$ 507,868	\$ 282,953	\$ -
% of Total Budgeted Funding Received		11.52%	34.72%	20.15%	17.51%	0.00%	44.27%	47.94%	29.28%	29.63%	31.12%	0.00%	0.00%	54.91%	26.61%	0.00%
EXPENDITURES																
Administrative	\$ -	\$ 1,749	\$ 60,236	\$ 5,101	\$ 6,654	\$ -	\$ 11,816	\$ 7,416	\$ 1,317	\$ 1,055	\$ 56	\$ -	\$ 1,600	\$ 53,607	\$ 26,927	\$ -
Salaries and Benefits	\$ 136,338	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
General and Administrative	\$ 77,607	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Allocated Indirect Costs	\$ (213,945)	\$ 70,937	\$ 5,506	\$ 5,101	\$ 196	\$ -	\$ 3,816	\$ 7,416	\$ 1,317	\$ 1,055	\$ 56	\$ 9	\$ 1,600	\$ 53,607	\$ 26,927	\$ 37
Reclassification	\$ -	\$ (69,188)	\$ 54,730	\$ -	\$ 6,458	\$ -	\$ 8,000	\$ -	\$ -	\$ -	\$ 0	\$ (9)	\$ -	\$ -	\$ -	\$ (37)
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Training	\$ -	\$ 24,293	\$ 596,035	\$ 298,231	\$ 54,935	\$ -	\$ 132,925	\$ 75,010	\$ 23,392	\$ 18,624	\$ 1,644	\$ -	\$ 13,828	\$ 469,521	\$ 270,407	\$ -
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ 261,651	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salaries and Benefits	\$ 60,315	\$ 401,213	\$ 23,000	\$ 7,767	\$ -	\$ -	\$ 16,775	\$ 51,105	\$ 4,468	\$ 3,547	\$ 254	\$ 71	\$ -	\$ 31,196	\$ 186,884	\$ 280
Contract Labor	\$ -	\$ 6,179	\$ 279	\$ -	\$ -	\$ -	\$ 138	\$ 1,287	\$ 71	\$ 56	\$ 2	\$ -	\$ -	\$ 2,931	\$ 6,410	\$ -
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,442	\$ -	\$ -
Support Services ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-ITA/OST/TAA	\$ -	\$ 90,452	\$ 13,475	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 60	\$ -
Training-OJT	\$ -	\$ 26,169	\$ 4,368	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training-Cust./Employed Worker	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 406,967	\$ -	\$ -
Travel	\$ 616	\$ 2,545	\$ 578	\$ 337	\$ -	\$ -	\$ 168	\$ 903	\$ 1,160	\$ 1,251	\$ 1	\$ -	\$ -	\$ 99	\$ 1,685	\$ -
One Stop Shared Costs	\$ -	\$ 75,242	\$ 3,002	\$ -	\$ -	\$ -	\$ 31,125	\$ 11,232	\$ 15,798	\$ 12,425	\$ 1,318	\$ 33	\$ -	\$ 3,276	\$ 38,547	\$ 124
Other Operating Expenses	\$ 12,387	\$ 61,620	\$ 5,716	\$ 26,728	\$ 7,868	\$ -	\$ 10,704	\$ 7,942	\$ 1,445	\$ 983	\$ 47	\$ 5	\$ 13,280	\$ 5,239	\$ 27,393	\$ 22
Allocated Program Indirect	\$ (73,317)	\$ 24,310	\$ 1,887	\$ 1,748	\$ 67	\$ -	\$ 1,308	\$ 2,541	\$ 451	\$ 362	\$ 19	\$ 3	\$ 548	\$ 18,371	\$ 9,228	\$ 13
Reclassification	\$ -	\$ (663,438)	\$ 543,729	\$ -	\$ 47,000	\$ -	\$ 72,706	\$ -	\$ -	\$ -	\$ 2	\$ (111)	\$ -	\$ -	\$ -	\$ (439)
Total Expenditures	\$ 0	\$ 26,043	\$ 656,270	\$ 303,332	\$ 61,590	\$ -	\$ 144,740	\$ 82,425	\$ 24,708	\$ 19,679	\$ 1,700	\$ -	\$ 15,429	\$ 523,129	\$ 297,334	\$ -
Funding Over/(under) expenditures	\$ 0	\$ 98,957	\$ (63,386)	\$ (67,097)	\$ (49,991)	\$ -	\$ 2,175	\$ 485	\$ (692)	\$ (665)	\$ 14,282	\$ -	\$ (15,429)	\$ (15,260)	\$ (14,380)	\$ -
YTD % of Budgeted Funds Expended		2.40%	38.43%	25.87%	92.97%	0.00%	43.62%	47.66%	30.13%	30.67%	3.31%	0.00%	22.92%	56.56%	27.96%	0.00%

LWDB 20
Summary of Funding and Expenditures
As of October 31, 2021

PY 21-22 TOTAL AVAILABLE FUNDING	470 Apprent Navigator	471 Sector Strategy	472 Sector Strategy	473 Recovery Navigator	474 Rapid Response Navigator	48 F.A.T.E.S.	49 Roof Truss Apprent Closed	792 Youth SOS SLC	793 Youth SOS MC	Other Non NFA	YEAR TO DATE TOTALS			
PY 21-22 Allocations	\$ -	\$ -	\$ -	\$ -	\$ 140,749	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 5,716,113		
PY 21-22 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 140,749		
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 75,702		\$ 75,702		
Additional Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 125,000	\$ -	\$ 300,000	\$ 45,000	\$ -		\$ 470,000		
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ (637,506)		
Carryforward to PY 22-23	\$ -	\$ -	\$ -	\$ (137,926)	\$ (102,997)	\$ -	\$ -	\$ -	\$ -	\$ -		\$ (1,357,657)		
Carryforward from PY 20-21	\$ 42,820	\$ 74,192	\$ 183,356	\$ 260,870	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 3,421,248		
TOTAL	\$ 42,820	\$ 74,192	\$ 183,356	\$ 122,944	\$ 37,752	\$ 125,000	\$ -	\$ 300,000	\$ 45,000	\$ 75,702	\$ -	\$ 7,828,650		
FUNDING DRAWN DOWN YTD														
	470 Apprent Navigator	471 Sector Strategy	472 Sector Strategy	473 Recovery Navigator	474 Rapid Response Navigator	48 F.A.T.E.S.	49 Roof Truss Apprent Closed	792 Youth SOS SLC	793 Youth SOS MC	Other Non NFA	PY 21-22 Actual	PY 21-22 Budget	VARIANCE	% Expended
PY 21-22 Allocations	\$ -	\$ -	\$ -	\$ -	\$ 7,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 512,687	\$ 5,716,113	\$ 5,203,427	8.969%
PY 21-22 Supplemental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 140,749	\$ 140,749	0.000%
Unrestricted Funds Earned this year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 38,353	\$ 38,353	\$ 75,702	\$ 37,349	50.663%
Additional Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 125,000	\$ -	\$ 67,091	\$ 5,998	\$ -	\$ 198,089	\$ 470,000	\$ 271,911	42.147%
Retained by DEO for Merit Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (637,506)	\$ (637,506)	
Carryforward to PY 22-23	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (1,357,657)	\$ (1,357,657)	
Carryforward from PY 20-21	\$ 26,820	\$ 74,192	\$ 156,177	\$ 25,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,821,880	\$ 3,421,248	\$ 1,599,368	53.252%
TOTAL	\$ 26,820	\$ 74,192	\$ 156,177	\$ 25,000	\$ 7,000	\$ 125,000	\$ -	\$ 67,091	\$ 5,998	\$ 38,353	\$ 2,571,009	\$ 7,828,650	\$ 5,257,641	32.841%
% of Total Budgeted Funding Received	62.63%	100.00%	85.18%	20.33%	18.54%	100.00%	0.00%	22.36%	13.33%	50.66%	32.84%			
EXPENDITURES											PY 19-20 Actual	PY 19-20 Budget	VARIANCE Under/(Over)	% Expended
Administrative	\$ 2,339	\$ 5,406	\$ 12,442	\$ 1,807	\$ 714	\$ 1,431	\$ -	\$ 7,398	\$ 603	\$ 4,270	\$ 213,945	\$ 726,767	\$ 512,822	29.44%
Salaries and Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 136,338	\$ 403,973	\$ 267,635	33.75%
General and Administrative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 77,607	\$ 322,794	\$ 245,187	24.04%
Allocated Indirect Costs	\$ 2,339	\$ 5,406	\$ 12,380	\$ 1,807	\$ 714	\$ 1,431	\$ 15	\$ 7,398	\$ 603	\$ 4,270	\$ 0	\$ (0)	\$ (0)	
Reclassification	\$ -	\$ -	\$ 62	\$ -	\$ -	\$ -	\$ (15)	\$ -	\$ -	\$ -	\$ 0	\$ -	\$ 0	
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Program Training	\$ 23,657	\$ 50,121	\$ 113,077	\$ 15,613	\$ 7,091	\$ 12,685	\$ -	\$ 64,827	\$ 5,419	\$ 48,935	\$ 2,320,269	\$ 7,091,627	\$ 4,771,358	32.7%
WIOA Youth Contracts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 261,651	\$ 1,000,000	\$ 738,349	26.2%
Salaries and Benefits	\$ 17,326	\$ 19,769	\$ 23,691	\$ -	\$ 5,096	\$ 1,771	\$ 119	\$ 2,678	\$ 681	\$ 15,844	\$ 873,850	\$ 2,960,815	\$ 2,086,966	29.5%
Contract Labor	\$ -	\$ 474	\$ 424	\$ 14,400	\$ -	\$ 38	\$ -	\$ 5,266	\$ 836	\$ 1,261	\$ 40,051	\$ 185,884	\$ 145,833	21.5%
Internship	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Incentives/Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 200	\$ 19,975	\$ 19,775	1.0%
Support Services Non-ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,442	\$ 15,228	\$ 13,785	9.5%
Support Services ITA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,570	\$ -	\$ -	\$ -	\$ -	\$ 1,570	\$ 23,935	\$ 22,365	6.6%
Training-ITA/OST/TAA	\$ -	\$ -	\$ 22,123	\$ -	\$ -	\$ 8,430	\$ -	\$ -	\$ -	\$ -	\$ 134,540	\$ 258,548	\$ 124,008	52.0%
Training-OJT	\$ -	\$ 22,298	\$ 34,292	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 87,127	\$ 434,763	\$ 347,636	20.0%
Training-Cust./Employed Worker	\$ -	\$ -	\$ 20,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 20,000	\$ 101,000	\$ 81,000	19.8%
WEX/ Internships/ Participant Wages	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 53,085	\$ 3,413	\$ -	\$ 463,465	\$ 815,951	\$ 352,486	56.8%
Travel	\$ 394	\$ 179	\$ 98	\$ 293	\$ 212	\$ 5	\$ -	\$ 33	\$ -	\$ 1,168	\$ 11,724	\$ 11,749	\$ 26	99.8%
One Stop Shared Costs	\$ -	\$ 4,602	\$ 6,200	\$ -	\$ -	\$ 327	\$ 50	\$ -	\$ -	\$ 10,090	\$ 213,390	\$ 621,905	\$ 408,516	34.3%
Other Operating Expenses	\$ 5,135	\$ 946	\$ 1,276	\$ 301	\$ 1,539	\$ 54	\$ 8	\$ 1,229	\$ 281	\$ 19,109	\$ 211,258	\$ 641,873	\$ 430,614	32.9%
Allocated Program Indirect	\$ 802	\$ 1,853	\$ 4,243	\$ 619	\$ 245	\$ 490	\$ 5	\$ 2,535	\$ 207	\$ 1,463	\$ (0)	\$ (0)	\$ -	
Reclassification	\$ -	\$ -	\$ 732	\$ -	\$ -	\$ -	\$ (182)	\$ -	\$ -	\$ -	\$ 0	\$ -	\$ 0	
Total Expenditures	\$ 25,996	\$ 55,527	\$ 125,519	\$ 17,420	\$ 7,805	\$ 14,116	\$ -	\$ 72,225	\$ 6,022	\$ 53,205	\$ 2,534,214	\$ 7,818,393	\$ 5,284,180	32.4%
Funding Over/(under) expenditures	\$ 823	\$ 18,665	\$ 30,658	\$ 7,580	\$ (805)	\$ 110,884	\$ -	\$ (5,134)	\$ (23)	\$ (14,852)	\$ 36,795			
YTD % of Budgeted Funds Expended	60.71%	74.84%	68.46%	14.17%	20.67%	11.29%	0.00%	24.07%	13.38%	70.28%	32.37%			

AGENDA ITEM SUMMARY

Title	Universal - Priority of Service for Veterans and Eligible Spouses Policy
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	CareerSource Florida Administrative Policy 111 Priority of Service for Veterans and Eligible Spouses
Action Requested	Review and Approve Universal - Priority of Service for Veterans and Eligible Spouses Policy
Background	The Jobs for Veterans Act (JVA), codified at 38 United States Code (U.S.C.) 4215, established a priority of service requirement for covered persons (i.e., veterans and eligible spouses) in qualified job training programs. While recipients of DOL funds for qualified job training programs have been required to provide priority of service since 2002, the publication of 20 CFR Part 1010, Priority of Service for Covered Persons Final Rule, which took effect on January 19, 2009, signaled that recipients of USDOL funds for these job training programs should review, and if necessary, enhance their current policies and procedures to ensure that adequate protocols are in place to ensure that priority is given to veterans and eligible spouses.
Staff Recommendations	Review and Approve Universal - Priority of Service for Veterans and Eligible Spouses Policy
Supporting Material	Universal - Priority of Service for Veterans and Eligible Spouses Policy
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

PURPOSE

The purpose of this policy is to establish CareerSource Research Coast's minimum requirements for implementing priority of service for veterans and eligible spouses for all United States Department of Labor (DOL) funded programs and services.

REFERENCES

CareerSource Florida Administrative Policy 111 Priority of Service for Veterans and Eligible Spouses.

BACKGROUND

The Jobs for Veterans Act (JVA), codified at 38 United States Code (U.S.C.) 4215, established a priority of service requirement for covered persons (i.e., veterans and eligible spouses) in qualified job training programs. While recipients of DOL funds for qualified job training programs have been required to provide priority of service since 2002, the publication of 20 CFR Part 1010, Priority of Service for Covered Persons Final Rule, which took effect on January 19, 2009, signaled that recipients of USDOL funds for these job training programs should review, and if necessary, enhance their current policies and procedures to ensure that adequate protocols are in place to ensure that priority is given to veterans and eligible spouses.

LOCAL POLICY

Priority of service means that covered persons are given priority over non-covered persons for the receipt of employment, training, and placement services funded in whole or in part by DOL, including, but not limited to:

- Workforce Innovation and Opportunity Act (WIOA) Title I, (Adult, Youth and Dislocated Worker)
- WIOA Title III, (Wagner-Peyser)
- Trade Adjustment Assistance (TAA)
- Migrant and Seasonal Farmworkers (MSFW)
- National Dislocated Worker Grants (NDWG)
- Senior Community Service Employment Program (SCSEP)

A. Eligibility

Covered persons may self-attest their status as eligible for priority of service. The only services that require eligibility verification are those cases where a decision is made to commit funding (e.g., WIOA training) to a covered person over another non-covered individual. Covered persons, for purposes of the provision of priority of service, are defined as follows:

1. Veteran:

A person who served at least one day in the active U.S. military, naval, or air service, and who was discharged or released under conditions other than dishonorable, as specified in 38 U.S.C 101(2). Active service includes full-time Federal service in the National Guard or a Reserve component. It does not include full-time duty performed strictly for training purposes, nor does it include full-time active duty performed by National Guard personnel who are mobilized by state rather than federal authorities.

2. Eligible Spouse:

The spouse of:

- a. A veteran who died of a service-connected disability.
- b. A member of the Armed Forces serving on active duty who, at the time of application for the priority, is listed in one or more of the following categories and has been so listed for a total of more than 90 days:
 - i. Missing in action.
 - ii. Captured in the line of duty by a hostile force.
 - iii. Forcibly detained or interned in the line of duty by a foreign government or power.
 - iv. A spouse of any veteran who has a total disability resulting from a service-connected disability, as evaluated by the Department of Veterans Affairs or
 - v. A spouse of any veteran who died while a total, service-connected disability was in existence.

B. Identifying Covered Persons

CSRC provides a variety of measures to identify and notify covered persons of priority of service. These measures include the following.

- Individuals who enter the career centers are asked if they have served, or are currently serving, in the United States military or are they an eligible spouse.
- Electronic kiosks located in each of the career centers allows individuals to self-identify as a covered person by asking if they have served, or currently serving, in the United States military or are an eligible spouse.
- Prominently displayed priority of service banners in each of the career center resource rooms as well as posted signage throughout the career center.
- Resource room computers display a priority of service screensaver.
- Workforce TV played throughout all career centers includes a priority of service slide.
- All CSRC staff visibly display priority of service desk signage in their work area and explain priority of service during orientations.
- Local Veteran Employment Specialists (LVER) provide annual priority of service training to all staff.
- The CSRC website prominently displays an explanation of priority of service for covered persons.

C. Applying Priority of Service

The application of priority of service varies depending on the eligibility requirements of the program. The four basic categories for WIOA Title I funded programs are listed below:

1. Universal Access Programs

For workforce programs that operate or deliver services to the public without targeting specific groups (e.g., Wagner-Peyser, WIOA basic career services), veterans and eligible spouses receive priority of service over all other program participants. Priority of service provides covered persons access to a service earlier than a non-covered person, or if a service or resource is limited, the person receives access instead of or before the non-covered person.

2. Programs with Eligibility Criteria

Eligibility criteria identify basic conditions that each participant in a specific program is required to meet. For example, for the WIOA Adult, Dislocated Worker, and Youth programs, every participant is required to meet program eligibility requirements (e.g., age, selective service registration, etc.). A veteran or eligible spouse must first meet all the eligibility criteria to be considered eligible for participation in the program. Once determined eligible for participation, the covered person receives priority for participation in the program and receipt of services.

3. Programs with Statutory Priorities

In addition to the eligibility criteria that all participants are required to meet, some programs have priorities that target certain populations and establish a rank order for enrolling or serving participants. While veterans' priority is required under federal law and cannot be waived, it is not intended to displace existing eligibility requirements and statutory priorities. Therefore, in these instances, veterans and eligible spouses must first meet both the program's eligibility and statutory priority criteria to receive priority for participation in the program and receipt of services (i.e., WIOA Adult).

4. Programs with Discretionary Priorities

Programs with discretionary priorities may try to provide a certain level of service to a group. However, the law does not mandate that the target group be served before other eligible individuals. With respect to priority of service, the only feature that distinguishes discretionary targeting programs from universal access programs is the additional application of the discretionary targeting criterion to non-covered persons. Therefore, LWDBs must apply priority of service in the order below:

- 1) Veterans and eligible spouses
- 2) Non-covered persons within the discretionary targeting group
- 3) Non-covered persons outside the discretionary targeting group.

D. Reporting Priority of Service

Employ Florida has implemented notification pop-ups that ensures newly registered veterans and covered persons are aware of their entitlement to priority of service and the scope and types of services available under priority of service. When a covered person self identifies at the point of registration in Employ Florida, the system automatically generates a service code 089 (Automated Veteran Priority of Service Notification) on the participant's Wagner-Peyser Program Application.

In instances where a covered person does not self-identify at registration, but is later determined to be eligible, staff must ensure the covered person is provided information regarding their priority of service rights and document this staff-assisted service through Employ Florida service code 189 (Notification of Veteran Priority of Service) and include the appropriate documentation/case note that aligns with the requirements prescribed in the Employ Florida Service Code Guide.

Refer to the Following:

Employ Florida Service Code Guide

AGENDA ITEM SUMMARY

Title	Jobs for Veterans State Grant (JVSG) - Veteran Intake Policy
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	CareerSource Florida Administrative Policy 102 Veteran Intake at Career Centers
Action Requested	Review and Approve JVSG - Veteran Intake Policy
Background	The Jobs for Veterans State Grant enables the hiring of DVOP specialists and Local Veteran Employment Representative (LVER) staff to provide employment services to veterans. JVSG is but one component of an umbrella of programs that are required by law to ensure veterans receive quality employment and training services. The JVSG staff fill a niche in that overall set of services for veterans and must be used to provide specialized services for specific segments of the veteran population.
Staff Recommendations	Review and Approve JVSG - Veteran Intake Policy
Supporting Material	JVSG - Veteran Intake Policy
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

PURPOSE

The purpose of this policy is to establish CareerSource Research Coast's (CSRC's) minimum requirements for conducting initial intakes with transitioning service members, veterans, and eligible spouses. This policy also ensures that Disabled Veteran Outreach Program (DVOP) specialists serve only targeted veteran populations designated by the United States Department of Labor (DOL).

REFERENCES

CareerSource Florida Administrative Policy 102 Veteran Intake at Career Centers.

BACKGROUND

The Jobs for Veterans State Grant (JVSG) enables the hiring of DVOP specialists and Local Veteran Employment Representative (LVER) staff to provide employment services to veterans. JVSG is but one component of an umbrella of programs required by law to ensure veterans receive quality employment and training services. The JVSG staff fill a niche in that comprehensive set of services for veterans and must be used to provide specialized services for specific segments of the veteran population.

LOCAL POLICY

Transitioning service members, veterans, and eligible spouses will be identified by a CSRC front-line staff upon entry to each career center. Each individual who enters the career center will be greeted and asked whether they have ever served in the United States military or are an eligible spouse. For all individuals who answer affirmatively, front-line staff will review their Employ Florida profiles to determine if a Veterans Screening/Intake has already been completed during the current Wagner-Peyser application period. If it has not, front-line staff will notify the next available CSRC staff member to meet with the veteran for an intake screening.

Note: The term "veteran" will include transitioning service members and eligible spouses throughout this policy.

If the Automated Veteran Priority of Service (POS) code has not been previously documented on the veteran's Employ Florida profile, CSRC staff will notify the veteran of POS and record the Notification of Veteran Priority of Service code in Employ Florida accordingly. CSRC staff will also assist the veteran in completing the "Veteran's Initial Intake Form" to determine if the veteran attests to having any of the defined Significant Barriers to Employment (SBE) or is a member of a target population and interested in obtaining employment services. Veterans interested in getting employment services who attest to having an SBE or a member of a target population will be immediately referred and escorted to the DVOP to receive individualized career services. The CSRC staff member who assisted with the screening of the veteran will email all completed intake forms to the designated email address.

Upon engaging the referred veteran, the DVOP will ensure the veteran has a fully completed Employ Florida registration Wagner-Peyser application to include the JVSG eligibility date. The DVOP will conduct an objective assessment as the first JVSG activity. Based on the objective assessment results, the DVOP will develop an Individual Employment Plan in conjunction with the veteran to identify objectives to meet the employment goal.

If a DVOP is not available at the time of referral, CSRC staff will continue to provide the veteran with the requested employment services. DVOPs are required to follow up with those veterans within two business days of the referral date to determine what additional services the veteran needs.

At no time should a veteran be asked to return later or time due to a DVOP specialist's unavailability.

Refer to:

Employ Florida Service Code Guide

CareerSource Administrative Policy 117 JVSG Employment and Advocacy Services

CareerSource Administrative Policy 111 Priority of Service for Veterans and Eligible Spouses

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AGENDA ITEM SUMMARY

Title	Jobs for Veterans State Grant (JVSG) - Employment and Advocacy Services Policy
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	CareerSource Florida Administrative Policy 117 Employment and Advocacy Services
Action Requested	Review and Approve JVSG - Employment and Advocacy Services Policy
Background	<p>With funding from the United States Department of Labor Veterans Employment and Training Service (DOL VETS), the Florida Department of Economic Opportunity (DEO) assigns JVSG-funded Disabled Veterans Outreach Program (DVOP) specialists, Local Veterans' Employment Representatives (LVERs), and Consolidated Positions (CP) to Local Workforce Development Boards (LWDBs).</p> <p>Florida's JVSG program prepares veterans, transitioning service members, and eligible spouses for meaningful careers. DVOP specialists provide individualized career services to eligible veterans and persons experiencing significant barriers to employment, with an emphasis on assisting veterans who are economically or educationally disadvantaged. LVER staff conduct outreach to employers and business associations to engage in advocacy efforts with hiring executives to develop employment opportunities for veterans and encourage the hiring of veterans.</p>
Staff Recommendations	Review and Approve JVSG - Employment and Advocacy Services Policy
Supporting Material	JVSG - Employment and Advocacy Services Policy
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

PURPOSE

The purpose of this policy is to establish CareerSource Research Coast's minimum requirements for Disabled Veterans Outreach Program (DVOP) Specialists and Local Veteran Employment Representatives (LVER) in providing employment and advocacy services to Jobs for Veteran State Grant (JVSG) participants.

REFERENCES

CareerSource Florida Administrative Policy 117 - Employment and Advocacy Services.

BACKGROUND

With funding from the United States Department of Labor Veterans Employment and Training Service (DOL VETS), the Florida Department of Economic Opportunity (DEO) assigns JVSG-funded Disabled Veterans Outreach Program (DVOP) specialists, Local Veterans' Employment Representatives (LVERs), and Consolidated Positions (CP) to Local Workforce Development Boards (LWDBs).

Florida's JVSG program prepares veterans, transitioning service members, and eligible spouses for meaningful careers. DVOP specialists provide individualized career services to eligible veterans and persons experiencing significant barriers to employment, with an emphasis on assisting veterans who are economically or educationally disadvantaged. LVER staff conduct outreach to employers and business associations to engage in advocacy efforts with hiring executives to develop employment opportunities for veterans and encourage the hiring of veterans.

LOCAL POLICY

Upon determination of a jobseeker's eligibility as outlined in the CareerSource Florida Administrative Policy 102 Veteran Intake at Career Centers, DVOP specialists and LVER staff must facilitate employment services to eligible persons as described in this policy.

A. Disabled Veteran Outreach Program Specialists

DVOP specialists facilitate individualized career services to eligible persons through the case management framework. The purpose of individualized career services is to provide eligible veterans and spouses the necessary information and customized support for obtaining sustained employment. Case management assists participants by evaluating the individual's service level needs, establishing an employment plan, delivering services, and providing consistent contact through a proactive and structured framework. DVOP specialists must emphasize a customer-focused approach, which recognizes that the eligible persons they serve are individuals who may require services that are tailored to their specific needs, situations, and goals.

Services provided to eligible individuals must be recorded in the State's online labor exchange and case management system, Employ Florida. DVOP specialists must facilitate the creation, or update, of the eligible person's Employ Florida individual registration and Wagner-Peyser Program Application.

Veterans who are participating in the United States Department of Veterans Affairs' Veteran Readiness and Employment (VR&E) Chapter 31 Program and/or the United States Department of Labor's Homeless Veteran Reintegration Program (HVRP) must be recorded as such in the Veteran page of the Wagner-Peyser Program Application.

DVOP specialists must enroll eligible persons into the JVSG sub-program by entering a JVSG eligibility date on the Intro page of the Wagner-Peyser Program Application. Once the eligible person's Employ Florida individual registration and Wagner-Peyser Program Application has been created, DVOP specialists must document employment services in the participant's Employ Florida Wagner-Peyser Program Application by recording the service code which corresponds to the service provided in accordance with the Employ Florida Service Code Guide. All services recorded by the DVOP must be recorded under the JVSG customer group in the veteran or eligible person's Wagner-Peyser Service Plan. The Objective Assessment must be the initial service provided to the eligible person to initiate JVSG participation. Additional services may be provided, but the primary services to be administered by DVOP specialists are outlined below.

- Objective Assessment
- Specialized Assessments
- Individual Career Counseling
- Individual Employment Plan
- Short-Term Prevocational Services
- Coordination of Wraparound Services
- Work Experience
- Workforce Preparation Activities
- Consistent Contact
- Outreach Engagement
- Work Readiness Case Conference
- Job Referrals
- Staff-Assisted Job Search Activities

During the case management process, it may be determined by the DVOP Specialist and JVSG participant that they would benefit from work-based learning and/or training to practice or enhance their current skills and knowledge. If this is determined, the DVOP Specialist will refer the JVSG participant to the Workforce Innovation and Opportunity Act (WIOA) program and record service code 211 (Referral to WIOA).

In the event a DVOP specialist vacates their position or is dismissed, their assigned JVSG participants will be reassigned within two business days to another DVOP by the JVSG Program Manager or designee. If there is no other DVOP, the assigned JVSG participants will be reassigned within two business days to career planners in an equitable manner based on the residence location of the JVSG participant. Reassignments will be facilitated by the JVSG Program Manager or designee.

B. Local Veterans' Employment Representative

LVERs conduct employer outreach activities as part of CSRC's Business Services Unit that support job developments and job referrals for veterans. To serve veterans and eligible persons effectively and efficiently, LVERs must focus on their primary role, which is employer outreach on behalf of veterans. In executing this role, LVER staff must concentrate efforts on advocacy services for veterans jointly determined to be work ready after receipt of individualized career services from a DVOP specialist. These activities must include efforts to increase job opportunities for veterans and eligible persons through direct employer contact.

LVER staff must document advocacy efforts in the employer's Employ Florida Service Record and/or the participant's Employ Florida Wagner-Peyser Program Application by recording the service code which

corresponds to the service provided in accordance with the Employ Florida Service Code Guide.

The primary services provided by the LVER are outlined below.

- Job Development (employer and eligible person)
- Referrals to Job Orders, resulting from Job Developments
- Veteran Advocacy Contact (employer and eligible person)

C. Career Center Staff

Career center staff must be prepared to serve veterans and eligible persons when a DVOP specialist is unavailable. At minimum, the veteran or eligible person must be provided with the services requested by the appropriate staff member. Additionally, career center staff must refer the eligible person to the DVOP specialist within two business days so that they may provide a follow-up contact to determine if any additional services are desired. The DVOP specialist who receives the referral must attempt to contact the eligible veteran or person within two business days of receipt of the referral.

Refer to the Following:

Employ Florida Service Code Guide

CareerSource Florida Administrative Policy 102 - Veteran Intake at Career Centers

JVSG - Employment and Advocacy Services Procedures

AGENDA ITEM SUMMARY

Title	Universal - Internal Monitoring Policy
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	CareerSource Florida Administrative Policy 083 - Direct Provider of Workforce Services
Action Requested	Review and Approve Universal - Internal Monitoring Policy
Background	CareerSource Florida and the Department of Economic Opportunity require each Local Workforce Development Board to conduct local monitoring of programs to ensure compliance with state and federal guidelines.
Staff Recommendations	Review and Approve Universal - Internal Monitoring Policy
Supporting Material	Universal - Internal Monitoring Policy
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

PURPOSE

The purpose of this policy is to CareerSource Research Coast's minimum standard for the internal monitoring of programs and services.

REFERENCES

CareerSource Florida Administrative Policy 083 - Direct Provider of Workforce Services

BACKGROUND

CareerSource Florida and the Department of Economic Opportunity require each Local Workforce Development Board to conduct local monitoring of programs to ensure compliance with state and federal guidelines.

LOCAL POLICY

CareerSource Research Coast (CSRC) Program Managers and/or designees, will conduct regularly scheduled internal monitoring utilizing the most recent version of the Department of Economic Opportunity's monitoring tool. A representative sample size of the following programs will be monitored.

- Workforce Innovation and Opportunity Act
- Welfare Transition
- Supplemental Nutrition Assistance Program
- Wagner Peyser
- Jobs for Veterans State Grant
- Migrant and Seasonal Farmworker Program

At the conclusion of the internal monitoring cycle, Program Managers and/or designees will prepare monitoring summary reports and provide the results to the direct supervisors of staff with identified findings, Other Non-compliance Issues (ONIs), and observations. Direct supervisors will then have a specified time to review the results with staff, take appropriate measures to correct issues if possible, and update the report with all actions taken, including training, counseling, or corrective action to avoid recurrence of the issue. The completed summary reports will be stored centrally on the CSRC Shared Drive.

In addition to internal monitoring, CSRC also contracts with an independent monitoring firm to conduct biannual monitoring of all programs. Within an agreed upon timeframe, the independent monitoring firm will provide a written report of their findings to CSRC management. The report is reviewed with program management and designated staff. Managers of staff who are responsible for the findings, ONIs, or observations will meet with the responsible staff and address accordingly, by correcting the error and/or providing training, counseling, or corrective action.

Refer to the Following:

Internal Monitoring Procedure

AGENDA ITEM SUMMARY

Title	Universal - Collection of Demographic Information Policy
Strategic Plans/Goals	Operational Intelligence
Policy/Plan/Law	Department of Economic Opportunity Guidelines for Compliance with Section 188 of the Workforce Investment Act: Collection of Demographic Data, 29 CFR §37.37
Action Requested	Review and Approve Universal - Collection of Demographic Information Policy
Background	In response to the United States Department of Labor’s Civil Rights Center’s review of Florida’s compliance with Equal Opportunity regulations, all local workforce boards are required to ensure their data collection systems reflect customers are asked to provide demographic information at the point when they first submit personal information.
Staff Recommendations	Review and Approve Universal - Collection of Demographic Information Policy
Supporting Material	Universal - Collection of Demographic Information Policy
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

PURPOSE

The purpose of this policy is to establish a standard to comply with federal regulations regarding the collection and maintenance of demographic information.

REFERENCES

Department of Economic Opportunity Guidelines for Compliance with Section 188 of the Workforce Investment Act: Collection of Demographic Data, 29 CFR §37.37

BACKGROUND

In response to the United States Department of Labor's Civil Rights Center's review of Florida's compliance with Equal Opportunity regulations, all local workforce boards are required to ensure their data collection systems reflect customers are asked to provide demographic information at the point when they first submit personal information.

POLICY

When requesting names, social security numbers, email addresses, or other personally identifying information (PII) from individuals, CareerSource Research Coast (CSRC) will request, collect, record, and maintain demographic information regarding race/ethnicity, sex, age, and where known, disability status, at the following access points including, but not limited to:

- Career Centers and satellite locations
- Hiring events
- Electronic registration/referral forms
- Visitor kiosk systems

When requesting demographic information, a written notice will be given to the individual to advise the following:

- Providing the information is voluntary.
- The information will be kept confidential as provided by law.
- Refusal to provide the information will not subject the individual to any adverse treatment.

The information will be used in accordance with the law.

Maintenance of the collected demographic information is stored in a manner that ensures confidentiality and is used only for the purposes of record keeping and reporting, determining eligibility for WIOA Title I financially assisted programs or activities, determining the extent to which CSRC is operating its WIOA Title I financially assisted program or activity in a nondiscriminatory manner, or other use authorized by law.

Refer to the Following:

Collection of Demographic Information Procedure

AGENDA ITEM 9

Agenda Item Summary

Title	WIOA - Guidelines for Self Sufficiency Policy
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Workforce Innovation and Opportunity Act 134 (3)(A)(ii); Workforce Innovation and Opportunity Act Regulation 663.230
Action Requested	Review and Approve WIOA - Guidelines for Self Sufficiency Policy Revisions
Background	<p>WIOA, Section 134 (3)(A)(ii) indicates that funds shall be used to provide intensive and/or training services to adults and dislocated workers who are employed but who need intensive and/or training services to obtain and/or retain employment that allows for self-sufficiency. WIOA regulations recognize that different local conditions influence the determination of self-sufficiency and allow local workforce development boards (LWDBs) to set the criteria for determining income earned by employed workers is less than self-sufficient. Factors such as family size and local economic conditions may be included in the criteria in determining self-sufficiency. CareerSource Research Coast (CSRC) must define self-sufficiency to determine eligibility for potential employed worker participants under WIOA.</p> <p>This amended policy updates the use of the Living Wage Calculator for the Port St. Lucie metropolitan statistical area as the measure of self-sufficiency for employed WIOA-funded participants.</p>
Staff Recommendations	Review and Approve WIOA - Self Sufficiency Policy Revisions
Supporting Material	WIOA - Self Sufficiency Policy Revisions
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>

PURPOSE

The federal Workforce Innovation and Opportunity Act (WIOA) allows local workforce development boards (LWDBs) to define self-sufficiency. ~~This policy establishes local criteria for the purposes of defining self-sufficiency and establishing Workforce Innovation and Opportunity Act (WIOA) eligibility for employed and unemployed adult and dislocated workers to receive career and training services. The purpose of this policy is to define the local criteria for determining self-sufficiency, a requirement for establishing the need for services and the employment goals for adults and dislocated workers and the eligibility, needs and employment goals of employed workers under WIOA.~~

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REFERENCES

Workforce Innovation and Opportunity Act 134 (3)(A)(ii); Workforce Innovation and Opportunity Act Regulation 663.230

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BACKGROUND

WIOA, Section 134 (3)(A)(ii) indicates that funds shall be used to provide intensive services to adults and dislocated workers who are employed, but who are determined by a one-stop operator to be in need of such intensive services in order to obtain or retain employment that allows for self-sufficiency. ~~The WIOA regulations at 663.230 recognizes that different local conditions impact the determination of self-sufficiency and states that self-sufficiency means employment that pays at least the lower living standard income level (LLSIL) provided by the federal government. The regulations allow LWDBs to set the criteria for determining whether employment leads to self-sufficiency or that income received by employed workers is less than self-sufficient. Factors such as family size and local economic conditions may be included in the criteria. It also acknowledges that dislocated workers may need wages above the lower living standard to be self-sufficient. Dislocated workers are not required to meet income eligibility to receive services. However, dislocated worker services must lead to self-sufficient employment.~~

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Analysts and policy makers often compare income to the federal poverty threshold in order to determine an individual's ability to live within a certain standard of living. However, poverty thresholds do not account for living costs beyond a very basic food budget. They do not measure costs like childcare and health care that not only draw from one's income, but also are determining factors in one's ability to work and to endure the potential hardships associated with balancing employment and other aspects of everyday life. Further, poverty thresholds do not account for geographic variation in the cost of essential household expenses.

The Living Wage Calculator, produced annually by Dr. Amy K. Glasmeier and the Massachusetts Institute of Technology, is an alternative measure of basic needs. It is a market-based approach 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 self-sufficiency.

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POLICY

For CareerSource Research Coast (CSRC), the income levels used to qualify employed career seekers for work-based training services that lead to career pathways in targeted industries will be determined based on the Living Wage Calculator for the Port St. Lucie, Florida metropolitan statistical area as shown in the tables below outlined on the Living Wage Calculator website at <https://livingwage.mit.edu/metros/38940>. ~~Because wage information is updated annually, the website referenced will provide the most current local wage rate that allows residents to meet minimum standards of living. These training services will be provided through Work Based Training that will increase their earning potential.~~

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For all other career seekers served through CSRC's One-Stop Career Centers CSRC, self-sufficiency will be determined based on household income compared to 200% of the Lower Living Standard Income Level (LLSIL) for family size.

The Family Unit Size 1 and Family Unit Size of 2 will be set at the same level.

PURPOSE

The Workforce Innovation and Opportunity Act (WIOA) allows local workforce development boards (LWDBs) to define self-sufficiency. This policy establishes local criteria for the purposes of defining self-sufficiency and establishing Workforce Innovation and Opportunity Act (WIOA) eligibility for employed and unemployed adult and dislocated workers to receive career and training services.

REFERENCES

Workforce Innovation and Opportunity Act 134 (3)(A)(ii); Workforce Innovation and Opportunity Act Regulation 663.230

BACKGROUND

WIOA, Section 134 (3)(A)(ii) indicates that funds shall be used to provide intensive services to adults and dislocated workers who are employed, but who are determined to be in need of such intensive services in order to obtain or retain employment that allows for self-sufficiency. WIOA regulations 663.230 recognizes that different local conditions impact the determination of self-sufficiency and states that self-sufficiency means employment that pays at least the lower living standard income level (LLSIL) provided by the federal government. The regulations allow LWDBs to set the criteria for determining whether employment leads to self-sufficiency or that income received by employed workers is less than self-sufficient. Factors such as family size and local economic conditions may be included in the criteria. It also acknowledges that dislocated workers may need wages above the lower living standard to be self-sufficient. Dislocated workers are not required to meet income eligibility to receive services, however, dislocated worker services must lead to self-sufficient employment.

Analysts and policy makers often compare income to the federal poverty threshold to determine an individual's ability to live within a certain standard of living. However, poverty thresholds do not account for living costs beyond a very basic food budget. They do not measure costs like childcare and health care that not only draw from one's income, but also are determining factors in one's ability to work and to endure the potential hardships associated with balancing employment and other aspects of everyday life. Further, poverty thresholds do not account for geographic variation in the cost of essential household expenses.

The Living Wage Calculator, produced annually by Dr. Amy K. Glasmeier and the Massachusetts Institute of Technology, is an alternative measure of basic needs. It is a market-based approach 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 self-sufficiency.

POLICY

For CareerSource Research Coast (CSRC), the income levels used to qualify employed career seekers for work-based training services that lead to career pathways in targeted industries will be determined based on the Living Wage Calculator for the Port St. Lucie, Florida metropolitan statistical area as outlined on the Living Wage Calculator website at <https://livingwage.mit.edu/metros/38940>. Because wage information is updated annually, the website referenced will provide the most current local wage rate that allows residents to meet minimum standards of living.

For all other career seekers served through CSRC, self-sufficiency will be determined based on household income compared to 200% of the Lower Living Standard Income Level (LLSIL) for family size.

The Family Unit Size 1 and Family Unit Size of 2 will be set at the same level.

AGENDA ITEM SUMMARY

Title	WIOA - Incumbent Worker Training Policy Revisions
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	WIOA, Title I, Pub. L. No 113-128, §§134(d)(4), U.S. Department of Labor, Training and Employment Guidance Letter (TEGL) No. 3-15, TEGL No. 19-16, and CareerSource Florida Administrative Policy No. 100
Action Requested	Review and Approve WIOA - Incumbent Worker Training Policy Revisions
Background	<p>Incumbent Worker Training (IWT) is a work-based activity designed to meet the needs of an employer or group of employers to retain a skilled workforce or avert layoffs and increase both participants' and companies' competitiveness. A Local Workforce Development Board can use up to 20% of their Adult and Dislocated Worker funds to provide for the federal share of the cost of providing IWT and the employer must pay for a significant cost of the training for those individuals enrolled in IWT.</p> <p>This revised policy updates the participant eligibility criteria for WIOA-funded participants in IWT.</p>
Staff Recommendations	Review and Approve WIOA - Incumbent Worker Training Policy Revisions
Supporting Material	WIOA - Incumbent Worker Training Policy Revisions
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4472 ext. 418</p>

PURPOSE

To provide guidance related to the Incumbent Worker Training (IWT) so that the program is delivered according to the laws, regulations and local policies governing the training activity.

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REFERENCES

WIOA, Title I, Pub. L. No 113-128, §§134(d)(4), U.S. Department of Labor, Training and Employment Guidance Letter (TEGL) No. 3-15, TEGL No. 19-16, and CareerSource Florida Administrative Policy No. 100

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BACKGROUND

Incumbent Worker Training (IWT) is a work-based training activity designed to meet the needs of an employer or group of employers to retain a skilled workforce or avert layoffs and increase both participants' and companies' competitiveness. A Local Workforce Development Board can use up to 20% of their Adult and Dislocated Worker funds to provide for the federal share of the cost of providing IWT and the employer must pay for a significant cost of the training for those individuals enrolled in IWT. This can be done through cash payments and fairly evaluated in-kind contributions expenses such as instruction/tuition, curriculum development, materials/supplies, the use of space and equipment during the training project and trainee wages including benefits of employees during training.

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POLICY:

CareerSource Research Coast (CSRC) works with employers to identify the skill gaps of their workers and develop a strategy to effectively engage workers in training that will provide the knowledge and skills needed to increase the competitiveness of the employees and/or employers. CSRC uses the following factors to determine IWT eligibility:

1. Characteristics of the employer

- a. The minimum amount of employer share in the IWT depends on the size of the employer and may not be less than:
 - i. 10 percent of the cost, for employers with 50 or fewer employees;
 - ii. 25 percent of the cost, for employers with between 51 to 100 employees; and
 - iii. 50 percent of the cost, for employers with more than 100 employees.
- b. The employer must be fully licensed to operate a business in Indian River, Martin and/or St. Lucie counties and have been in business for a minimum of one year prior to the IWT contract date.
- c. The employer must have a least five full-time employees apart from the owner(s).
- d. The employer must demonstrate financial viability and must be current on all state tax obligations.
- e. The employer must complete all applicable information on the training agreement.
- f. The employer must pay the full cost of the training and provide documentation of payment to the vendor.
- g. The employer must provide a certificate of completion for each employee trained in order to receive reimbursement. The employer will be responsible for the training cost if an employee fails to attend or complete scheduled training, and therefore does not receive a credential.
- h. The employer must provide a CSRC representative with employment status and wages on all IWT participants on the following schedule: 90, 180, 270 and 365 days following the completion of training. This can be provided via an e-mail spreadsheet.
- i. The employer must maintain accurate records of the project's implementation and certify that all information provided for the purpose of requesting reimbursements and training is accurate and true.
- j. The employer must agree to cooperate with monitoring requirements conducted by the state and/or CSRC, including making available hard copy employee documentation upon request.

k. Preference is given to Businesses in one of the key Industry Clusters:

- Health Care
- Manufacturing
- Logistics and Distribution
- Construction Trades
- Hospitality
- Business/Professional Services

l. Generally, IWT should be provided to private sector employers. However, non-profit and local government entities may be approved for IWT by the President/CEO upon recommendation of the Vice President of Operations/COO, or Vice President of Strategic Initiatives.

2. Characteristics of Participants

- a. Participants must have an established employment history with the employer for six months or more or be part of a cohort in which where the majority of those employees being trained have an established employment history with the employer for six months or more. Employment with the employer may include time spent as a temporary or contract worker.
- b. Participants must meet the Fair Labor Standards Act (FLSA) requirements for an employer-employee relationship.
- c. Participants must not be related to the owner(s) of the business.
- d. If enrolled in WIOA, a participant's earnings must not exceed CSRC's the self-sufficiency wage as defined in CSRC's Self-Sufficiency Wage Policy. The local self-sufficiency wage is based on the Living Wage Calculator for the Port St. Lucie, Florida metropolitan statistical area as outlined on the Living Wage Calculator website at <https://livingwage.mit.edu/metros/38940>. self-sufficiency wage of \$30.74 per hour, as defined in CSRC's Self Sufficiency Wage policy.

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3. Characteristics of the training

- a. Upon successful completion of the IWT, participants will receive an industry recognized certification or credential.

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Refer to WIOA – Incumbent Worker Training Procedure

PURPOSE

To provide guidance related to the Incumbent Worker Training (IWT) so that the program is delivered according to the laws, regulations and local policies governing the training activity.

REFERENCES

WIOA, Title I, Pub. L. No 113-128, §§134(d)(4), U.S. Department of Labor, Training and Employment Guidance Letter (TEGL) No. 3-15, TEGL No. 19-16, and CareerSource Florida Administrative Policy No. 100

BACKGROUND

Incumbent Worker Training (IWT) is a work-based training activity designed to meet the needs of an employer or group of employers to retain a skilled workforce or avert layoffs and increase both participants' and companies' competitiveness. A Local Workforce Development Board can use up to 20% of their Adult and Dislocated Worker funds to provide for the federal share of the cost of providing IWT and the employer must pay for a significant cost of the training for those individuals enrolled in IWT. This can be done through cash payments and fairly evaluated in-kind contributions expenses such as instruction/tuition, curriculum development, materials/supplies, the use of space and equipment during the training project and trainee wages including benefits of employees during training.

POLICY:

CareerSource Research Coast (CSRC) works with employers to identify the skill gaps of their workers and develop a strategy to effectively engage workers in training that will provide the knowledge and skills needed to increase the competitiveness of the employees and/or employers. CSRC uses the following factors to determine IWT eligibility:

1. Characteristics of the employer
 - a. The minimum amount of employer share in the IWT depends on the size of the employer and may not be less than:
 - i. 10 percent of the cost, for employers with 50 or fewer employees.
 - ii. 25 percent of the cost, for employers with between 51 to 100 employees; and
 - iii. 50 percent of the cost, for employers with more than 100 employees.
 - b. The employer must be fully licensed to operate a business in Indian River, Martin and/or St. Lucie counties and have been in business for a minimum of one year prior to the IWT contract date.
 - c. The employer must have a least five full-time employees apart from the owner(s).
 - d. The employer must demonstrate financial viability and must be current on all state tax obligations.
 - e. The employer must complete all applicable information on the training agreement.
 - f. The employer must pay the full cost of the training and provide documentation of payment to the vendor.
 - g. The employer must provide a certificate of completion for each employee trained in order to receive reimbursement. The employer will be responsible for the training cost if an employee fails to attend or complete scheduled training, and therefore does not receive a credential.
 - h. The employer must provide a CSRC representative with employment status and wages on all IWT participants on the following schedule: 90, 180, 270 and 365 days following the completion of training. This can be provided via an e-mail spreadsheet.
 - i. The employer must maintain accurate records of the project's implementation and certify that all information provided for the purpose of requesting reimbursements and training is accurate and true.
 - j. The employer must agree to cooperate with monitoring requirements conducted by the state and/or CSRC, including making available hard copy employee documentation upon request.

k. Preference is given to Businesses in one of the key Industry Clusters:

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

l. Generally, IWT should be provided to private sector employers. However, non-profit, and local government entities may be approved for IWT by the President/CEO upon recommendation of the Vice President of Operations/COO.

2. Characteristics of Participants

- a. Participants must have an established employment history with the employer for six months or more or be part of a cohort where the majority of those employees being trained have an established employment history with the employer for six months or more. Employment with the employer may include time spent as a temporary or contract worker.
- b. Participants must meet the Fair Labor Standards Act (FLSA) requirements for an employer-employee relationship.
- c. Participants must not be related to the owner(s) of the business.
- d. If enrolled in WIOA, a participant's earnings must not exceed the self-sufficiency wage as defined in CSRC's Self-Sufficiency Wage Policy. The local self-sufficiency wage is based on the Living Wage Calculator for the Port St. Lucie, Florida metropolitan statistical area as outlined on the Living Wage Calculator website at <https://livingwage.mit.edu/metros/38940>.

3. Characteristics of the training

- a. Upon successful completion of the IWT, participants will receive an industry recognized certification or credential.

Refer to WIOA – Incumbent Worker Training Procedure

AGENDA ITEM SUMMARY

Title	Welfare Transition (WT) Program - Assigning Activities Policy Revisions
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	45 CFR 261.21, Florida Statue 445.024
Action Requested	Review and Approve WT Program - Assigning Activities Policy Revisions
Background	<p>The Temporary Assistance for Needy Families Program requires recipients of Temporary Cash Assistance who are not exempt from work requirements to participate in countable work activities for a specified number of hours per month.</p> <p>The local policy was updated to reflect the number of work activity hours participants will be assigned based on the State of Florida's monthly federal participation rate requirement. For the purposes of consolidation and accessibility, the Community Service Work Experience Policy and the Job Search and Job Readiness Policy were discontinued and the work activity elements from each were added to this policy.</p>
Staff Recommendations	Review and Approve the Revisions to the WT Program - Assigning Activities Policy Revisions
Supporting Material	WT Program - Assigning Activities Policy Revisions
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 518</p>

PURPOSE

The purpose of this policy is to establish a uniform standard that meets contractual and regulatory requirements for the assignment of work activities to Welfare Transition (WT) Program participants receiving Temporary Cash Assistance (TCA).

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REFERENCES

45 CFR 261.21, Florida's Work Verification Plan (2012), Temporary Assistance for Needy Families State Plan for the current Federal Fiscal Year, and Florida Statute 445.024.

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BACKGROUND

TCA recipients who are not exempt from work requirements must participate in countable work activities for a specified number of hours per month.

LOCAL POLICY

In order to assign the appropriate work activities to the Welfare Transition (WT) Program participant, the Career Planner must evaluate the participant's skills, work experience, job/work readiness, needs, barriers to employment, and goals. Activities are assigned to prepare the participant for self-sufficient employment.

Activity Categories

Activities are categorized into Core activities and Core Plus activities.

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The following is a list of Core activities:

- Unsubsidized eEmployment
- Subsidized Private Sector Employment
- Subsidized Public-Sector Employment
- Community Service Program
- Work Experience (CSWE)
- Vocational Education and Training (~~12-month lifetime maximum~~)
- On-the-Job Training
- Job Search and Job Readiness Assistance
- Providing eChildcare sServices

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The following is a list of Core Plus activities:

- Job Skills Training Directly Related to Employment
- Education Directly Related to Employment
- Satisfactory Attendance at a Secondary School or in a Course of Study Leading to a GED*
 - *Participants 19 years of age or younger who do not have a high school diploma or GED may use the Satisfactory Attendance at a Secondary School or in a Course of Study Leading to a GED activity as a Core activity.

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Assigning Participation Hours

WT Program participants will be assigned a weekly number of work activity hours based on the following State of Florida's monthly federal participation rate requirement:

- A WT Program participant with a child age five or younger on the TCA case will be assigned to complete 87 hours per month in a Core activity.

- A WT Program participant whose youngest child on the TCA case is age six or older will be assigned to complete a total of 130 hours per month. The participant must be assigned 87 hours in a Core activity and 43 hours in a Core and/or Core Plus activity.

If the individual participant completes all required hours for the month, he/she will be counted positively in the state's federal participation rate (All Family Participation Rate).

If the individual is part of a two-parent case, there are additional hours that must be completed to meet a second participation rate (Two-Parent Participation Rate). In the instance of a two-parent case, the rate is composed of the total hours the family completes combined.

- For a family receiving federally funded childcare, both parents combined must complete 238 hours per month. 217 hours must be completed in a Core Activity. The additional 21 hours may be completed in a Core and/or Core Plus activity.
- For a family not receiving federally funded childcare, both parents combined must complete 152 hours per month. 130 hours must be completed in a Core activity. The additional 22 hours may be completed in a Core and/or Core Plus activity.

~~WT Program participants are required to complete 25 hours each week of assigned work activities. Participants are assigned to a minimum of 23 hours per week in a Core activity. The remaining 12 hours may be completed in either a Core or a Core Plus activity. Participants temporarily deferred from participation, along with and participants completing the CSWE activity are exempted not subject from to this requirement.~~

Certain activities have additional limitations/requirements as follows:

Community Service and Work Experience (CSWE)

~~The monthly CSWE hours are calculated by adding assigned according to the calculation of the participant's monthly TCA cash assistance benefit to the monthly SNAP plus monthly food stamp benefit and divided by minimum wage. The result of this calculation dictates the number of CSWE hours assigned to a participant for the month. For example: If the participant's monthly TCA benefit is \$241 and his/her monthly SNAP benefit is \$459, he/she could complete 70 hours of CSWE per month (\$241+\$459/\$10=70 hours).~~

~~Refer to the WTP — Community Service Work Experience Policy for additional information.~~

~~A CSWE Worksite Agreement must be signed by both the employer and CSRC's President/CEO prior to assigning a participant to the CSWE activity. The agreement must include responsibilities of the worksite supervisor, performance benchmarks, goals, outcomes, signature(s) of the approved supervisor(s), and time limits to ensure participants are moving toward employment and self-sufficiency. In addition, CareerSource Research Coast requires the completion of a Worksite Pre-Evaluation and a training outline detailing the duties of the position.~~

~~A participant may not be assigned to a specific CSWE worksite for more than six months. The participant's progress must be evaluated every three months. The evaluation must be signed by the Career Planner, the worksite supervisor, and the participant.~~

Vocational Education and Training

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Vocational Training ~~activity is limited in use to a 12-month lifetime maximum. The activity~~ may be assigned to an participant already attending a classroom training program. The participant must submit his/her school registration and schedule prior to the Career Planner assigning the activity. In addition to actual classroom hours, countable hours may include supervised time spent in curriculum-required labs and clinical settings, supervised study halls, and up to one hour of unsupervised homework time for each hour of class time. Total homework time counted for participation cannot exceed the hours attended in class or ~~advised the amount authorized~~ by the educational program/instructor. Prior to the Career Planner assigning or accepting the additional hours, the instructor must complete the appropriate forms authorizing study time and lab hours.

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Online Vocational Training courses and High School/GED classes must not be counted toward the weekly mandatory participation requirement unless there is a reliable source for documenting the actual time spent in class.

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Job Search & Job Readiness

The Job Search and Job Readiness activity is limited to a four-week consecutive period and may be used for a total of 12 weeks per rolling 12-month period. In addition to the limitation of weeks, there is a limitation on the total number of hours that can be completed during the 12-month period. ~~The maximum number of allowable hours per rolling 12-month period for a single parent with a child under the age of six is 240 hours. The maximum number of allowable hours for all other work-eligible participants is 360 hours. Refer to the WTP – Job Search and Job Readiness Policy for additional information.~~

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~~Florida's Work Verification Plan requires verification of a minimum of 10% of all job contacts. The type of supporting documentation submitted by the participant will determine the approach the Career Planner will take to ensure 10% of job contacts are verified. An employer's business card or brochures/ flyers may be verified by contacting the employer to assure that an application or resume has been submitted. Time sheets signed by CSRC staff and email confirmations may be considered verifiable and a telephone call to the employer is not warranted.~~

Providing Childcare Services

~~CSRC does not utilize the Providing Childcare Services work activity.~~

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Refer to the following documents:

- ~~WTP – Assigning Activities Procedure~~
- ~~WTP – Job Search and Job Readiness Policy~~
- ~~WTP – Job Search and Job Readiness Procedure~~
- ~~WTP – Community Service Work Experience Policy~~
- ~~WTP – Community Service Work Experience Procedure~~

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PURPOSE

The purpose of this policy is to establish a uniform standard that meets contractual and regulatory requirements for the assignment of work activities to Welfare Transition (WT) Program participants receiving Temporary Cash Assistance (TCA).

REFERENCES

45 CFR 261.21, Florida's Work Verification Plan (2012), Temporary Assistance for Needy Families State Plan for the current Federal Fiscal Year, and Florida Statute 445.024.

BACKGROUND

TCA recipients who are not exempt from work requirements must participate in countable work activities for a specified number of hours per month.

LOCAL POLICY

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- Subsidized Public-Sector Employment
- Community Service Program
- Work Experience
- Vocational Education and Training
- On-the-Job Training
- Job Search and Job Readiness
- Providing Childcare Services

The following is a list of Core Plus activities:

- Job Skills Training Directly Related to Employment
- Education Directly Related to Employment
- Satisfactory Attendance at a Secondary School or in a Course of Study Leading to a GED*
*Participants 19 years of age or younger who do not have a high school diploma or GED may use the *Satisfactory Attendance at a Secondary School or in a Course of Study Leading to a GED* activity as a Core activity.

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Participants temporarily deferred from participation and participants completing the CSWE activity are not subject to this requirement.

Certain activities have limitations/requirements as follows:

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The monthly CSWE hours are calculated by adding the participant's monthly TCA benefit to the monthly SNAP benefit and divided by minimum wage. The result of this calculation dictates the number of CSWE hours assigned to a participant for the month. For example: If the participant's monthly TCA benefit is \$241 and his/her monthly SNAP benefit is \$459, he/she could complete 70 hours of CSWE per month ($\$241 + \$459 / \$10 = 70$ hours).

A CSWE Worksite Agreement must be signed by both the employer and CSRC's President/CEO prior to assigning a participant to the CSWE activity. The agreement must include responsibilities of the worksite supervisor, performance benchmarks, goals, outcomes, signature(s) of the approved supervisor(s), and time limits to ensure participants are moving toward employment and self-sufficiency. In addition, CareerSource Research Coast requires the completion of a Worksite Pre-Evaluation and a training outline detailing the duties of the position.

A participant may not be assigned to a specific CSWE worksite for more than six months. The participant's progress must be evaluated every three months. The evaluation must be signed by the Career Planner, the worksite supervisor, and the participant.

Vocational Education and Training

Vocational Training activity is limited in use to a 12-month lifetime maximum. The activity may be assigned to a participant already attending a classroom training program. The participant must submit his/her school registration and schedule prior to the Career Planner assigning the activity. In addition to actual classroom hours, countable hours may include supervised time spent in curriculum-required labs and clinical settings, supervised study halls, and up to one hour of unsupervised homework time for each hour of class time. Total homework time counted for participation cannot exceed the hours attended in class or the amount authorized by the educational

program/instructor. Prior to the Career Planner assigning or accepting the additional hours, the instructor must complete the appropriate forms authorizing study time and lab hours.

Online Vocational Training courses and High School/GED classes must not be counted toward the weekly mandatory participation requirement unless there is a reliable source for documenting the actual time spent in class.

Job Search and Job Readiness

The Job Search and Job Readiness activity is limited to a four-week consecutive period and may be used for a total of 12 weeks per rolling 12-month period. In addition to the limitation of weeks, there is a limitation on the total number of hours that can be completed during the 12-month period. The maximum number of allowable hours per rolling 12-month period for a single parent with a child under the age of six is 240 hours. The maximum number of allowable hours for all other work-eligible participants is 360 hours

Florida's Work Verification Plan requires verification of a minimum of 10% of all job contacts. The type of supporting documentation submitted by the participant will determine the approach the Career Planner will take to ensure 10% of job contacts are verified. An employer's business card or brochures/ flyers may be verified by contacting the employer to assure that an application or resume has been submitted. Time sheets signed by CSRC staff and email confirmations may be considered verifiable and a telephone call to the employer is not warranted.

Providing Childcare Services

CSRC does not utilize the Providing Childcare Services work activity.

Refer to the following documents:

WTP – Assigning Activities Procedure

AGENDA ITEM SUMMARY

Title	Welfare Transition (WT) Program - Medical Incapacity Policy Revisions
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Florida Statute 414.065, Fla. Admin. Code R. 65A-4.206
Action Requested	Review and Approve WT Program - Medical Incapacity Policy Revisions
Background	<p>The Temporary Assistance for Needy Families Program requires the referral of non-exempt Temporary Cash Assistance recipients to the Local Workforce Development Board for participation in the WT Program, including participants with a medically documented inability to participate. Florida statutes allow the assignment of work activities to be consistent with a participant's medical limitation. Participants who are unable to provide the necessary documentation to support the assignment of alternate program activities are required to fully participate in the WT Program.</p> <p>The local policy was updated to reflect the number of work activity hours participants will be assigned based on the State of Florida's monthly federal participation rate requirement.</p>
Staff Recommendations	Review and Approve WT Program - Medical Incapacity Policy Revisions
Supporting Material	WT Program - Medical Incapacity Policy Revisions
Board Staff	Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418

PURPOSE

The purpose of this policy is to establish a uniform standard that meets contractual and regulatory requirements for participants who are temporarily or permanently unable to participate in the Welfare Transition (WT) Program due to a medical condition.

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REFERENCES

Temporary Assistance for Needy Families State Plan for the current Federal Fiscal Year, Florida Statute 414.065, and Fla. Admin. Code R. 65A-4.206

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BACKGROUND

All individuals who meet the eligibility requirements for Temporary Cash Assistance (TCA) but do not meet Florida's Department of Children and Families exemption criteria are referred to the Local Workforce Development Board for mandatory participation in the WT Program. This includes participants with a medically documented inability to fully participate. If the individual is unable to participate in work activities due to a medical limitation, he/she may be deferred from participation under Florida Statute, Chapter 414.065(4)(d)(e)&(f). This provision allows for assignment of work activities to be consistent with a participant's medical limitation.

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LOCAL POLICY

Participants who are unable to complete work activities due to a medical limitation are provided with a CareerSource Research Coast's Medical Verification Form for a licensed physician (chapter 458 or 459, F.S.) to complete. If the participant provides documentation supporting the presence of a medical condition, the assignment of work activities may be delayed for up to two weeks. If a participant is unable to provide supporting documentation, the assignment of work activities may be delayed for one week. If, after this timeframe, a Medical Verification Form signed by a licensed physician is not submitted to the WT Career Planner, the participant will be assigned to complete the number of weekly to 35 hours per week of a work activity hours consistent with the State of Florida's monthly federal participation rate requirement. Refer to the WTP – Assigning Activities Policy for additional guidance.

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If the Medical Verification Form indicates the medical condition is permanent, the participant will be required to apply for Supplemental Security Income/Social Security Disability Insurance. A new Medical Verification Form will be required every 90 days unless the physician indicates the condition is temporary lasting less than 90 days. If the duration indicated is less than 90 days, a new Medical Verification Form is required at the end of the timeframe listed by the physician. If a duration is not selected and the condition is listed as temporary, a new Medical Verification Form is required monthly.

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Medically deferred participants will be ineligible for support services, as they are not completing the required 35 hours per week of assigned activities.

Refer to the following documents:

WTP – Medical Incapacity Procedure – December 2018

WTP – Assigning Activities Policy

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PURPOSE

The purpose of this policy is to establish a uniform standard that meets contractual and regulatory requirements for participants who are temporarily or permanently unable to participate in the Welfare Transition (WT) Program due to a medical condition.

REFERENCES

Temporary Assistance for Needy Families State Plan for the current Federal Fiscal Year, Florida Statute 414.065, and Fla. Admin. Code R. 65A-4.206

BACKGROUND

All individuals who meet the eligibility requirements for Temporary Cash Assistance but do not meet Florida's Department of Children and Families exemption criteria are referred to the Local Workforce Development Board for mandatory participation in the WT Program. This includes participants with a medically documented inability to fully participate. If the individual is unable to participate in work activities due to a medical limitation, he/she may be deferred from participation under Florida Statute, Chapter 414.065(4)(d)(e)&(f). This provision allows for assignment of work activities to be consistent with a participant's medical limitation.

LOCAL POLICY

Participants who are unable to complete work activities due to a medical limitation are provided with CareerSource Research Coast's *Medical Verification Form* for a licensed physician (chapter 458 or 459, F.S.) to complete. If the participant provides documentation supporting the presence of a medical condition, the assignment of work activities may be delayed for up to two weeks. If a participant is unable to provide supporting documentation, the assignment of work activities may be delayed for one week. If, after this timeframe, a Medical Verification Form signed by a licensed physician is not submitted to the WT Career Planner, the participant will be assigned to complete the number of weekly work activity hours consistent with the State of Florida's monthly federal participation rate requirement. Refer to the WTP – Assigning Activities Policy for additional guidance.

If the Medical Verification Form indicates the medical condition is permanent, the participant will be required to apply for Supplemental Security Income/Social Security Disability Insurance. A new Medical Verification Form will be required every 90 days unless the physician indicates the condition is temporary lasting less than 90 days. If the duration indicated is less than 90 days, a new Medical Verification Form is required at the end of the timeframe listed by the physician. If a duration is not selected and the condition is listed as temporary, a new Medical Verification Form is required monthly.

Refer to the following documents:

WTP – Medical Incapacity Procedure

WTP – Assigning Activities Policy

AGENDA ITEM SUMMARY

Title	CareerSource Research Coast (CSRC) Recommendation for One-Time Discretionary Bonus for Executive Team
Strategic Plans/Goals	Administration & Strategic Planning
Policy/Plan/Law	DEO Grantee/Subgrantee Agreement, Section 11(b), CareerSource Research Coast (CSRC) Executive Staff Bonus and CSRC Administrative - Employee Bonus Policy
Action Requested	Review and Approve Recommendation for a One-Time Discretionary Bonus to the Executive Team
Background	<p>Per the DEO Grantee/Sub-Grantee Agreement, no changes to compensation for the board's executive staff are allowed without documented Board approval and must align with local policies and procedures. The Board shall ensure that all bonus, pay raises, and benefits are reasonable and necessary for the successful performance of the award and are a prudent use of federal funding.</p> <p>In compliance with CSRC Administrative - Employee Bonus Policy, the Executive Committee for CareerSource Research Coast will consider the recommendation to approve a one-time discretionary bonus for each member of the Executive Management team:</p> <p style="padding-left: 40px;">Brian Bauer - President/CEO Tracey McMorris - Vice President of Operations Lisa Delligatti - Chief Financial Officer</p> <p>The bonus shall be equivalent to one week's pay for each officer and subject to local, state, and federal taxes.</p>
Staff Recommendations	Review and Approve Recommendation for a One-Time Discretionary Bonus for Executive Team
Supporting Material	None
Board Staff	<p>Brian Bauer President/CEO bbaueri@careersourcerc.com 1-866-482-4473 ext. 418</p>

AGENDA ITEM SUMMARY

Title	Request for Proposal (RFP) for One-Stop Operator
Strategic Plans/Goals	Effective Utilization of Current and Timely Operational Intelligence for all Stakeholders
Policy/Plan/Law	Workforce Innovation and Opportunity Act (WIOA) Competitive Selection of One-Stop Operators, January 17, 2017, Training and Employment Guidance Letter (TEGL) No. 15-16, CareerSource Administrative Policy No. 97
Action Requested	Review and Approve Request for Proposal (RFP) for One-Stop Operator
Background	<p>WIOA Training and Employment Guidance Letter (TEGL) No. 15-16, CareerSource Administrative Policy No. 97, sets forth a new and more integrated philosophy of service delivery by requiring a clear separation between the One-Stop Operator responsibilities and the provider of adult and dislocated worker career services. Since 2009, CSRC has acted as the administrative entity, One-Stop Operator, and the provider of adult and dislocated workers career services.</p> <p>WIOA requires local workforce boards to define the One-Stop operator's responsibilities and to procure a One-Stop operator. WIOA also requires a differentiated role of a One-Stop Operator whose main function is to serve as the coordinator of service delivery of all One-Stop required partners including Adult Education, Vocational Rehabilitation, Community Services Block Grant providers and the Division of Blind Services.</p>
Staff Recommendations	Review and Approve Request for Proposal for One-Stop Operator
Supporting Material	Request for Proposal for One-Stop Operator
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>



January 31, 2022

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-21-001-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 Wednesday, March 23, 2022**. All questions must be submitted via the CSRC website <https://careersourcerc.com/rfp-21-001-oso-one-stop-operator/> by March 16, 2022. 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,

Tracey McMorris
Vice President/COO





CareerSource RESEARCH COAST

Request for Proposal

For

ONE-STOP OPERATOR

RFP #21-001-OSO

Date Issued:

DEADLINE FOR SUBMISSION: March 23, 2022 at 4:30 pm

**Responses should be directed to:
Tracey McMorris, 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..... 6
- H. Additional Information 6
- I. General Proposal Instructions 6
- J. Proposal Format..... 7
- K. Solicitation Timelines..... 8
- L. Proposal Submission 8
 - 1. Proposal Deadline..... 8
 - 2. Inquiries..... 8
 - 3. Conditions of Proposal..... 8
 - 4. Initial Technical Review..... 9
 - 5. Review by RFP Review Team..... 9
 - 6. Small and/or Minority-Owned Businesses..... 9
 - 7. Proposal Acceptance/Protest 9
- M. Negotiations..... 10
- N. Notification of Award 10

ATTACHMENTS

- A. CAREERSOURCE RESEARCH COAST COMPETITIVELY PROCURED SERVICE PROVIDERS AND VENDORS 11
- B. CAREERSOURCE RESEARCH COAST BOARD OF DIRECTORS..... 12
- C. RELATIONSHIP DISCLOSURE FORM..... 14
- D. WORKERS COMPENSATION RELEASE..... 15
- E. PROPOSER CONTRACT CERTIFICATION 17
- F. GENERAL PROVISIONS AND ASSURANCES 18
- G. INITIAL TECHNICAL REVIEW – ONE-STOP OPERATOR RFP #21-001-OSO 22
- H. RATING SHEET FOR RFP #21-001-OSO 24

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. 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 in the amount not to exceed \$35,000, per year, with an estimated total hours for the project not to exceed 1,040. 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

Additional information on CSRC, workforce development, legislation and programming, can be found at the following sources:

- CareerSource Florida - <http://careersourceflorida.com/>
- CareerSource Florida Administrative Policy 097 – One-Stop Operator Procurement - [CSFL AP 097](#)
- 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-21-001-oso-one-stop-operator/>. Questions must be submitted by March 16, 2022. 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:

**Tracey McMorris, Vice President/COO
CareerSource Research Coast
584 NW University Blvd., Suite 100
Port St. Lucie, FL 34986**

Please show the solicitation number **RFP #21-001-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. EST on Wednesday, March 23, 2022.** All proposals will be date stamped as of the date and time received.

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 emailed to proposals@careersourcerc.com before 4:30 p.m. EST on March 23, 2022.

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, 2022 through June 30, 2023. 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 F)

K. SOLICITATION TIMELINES

Mailing/advertising of RFP	January 31, 2022
Final date for questions related to RFP	March 16, 2022
Proposals Due	March 23, 2022, by 4:30 p.m.
Technical Review	March 28, 2022
Rating Team Review	March 30, 2022
CareerSource Research Coast's Approval/Contract Award	April 27, 2022
Contract Execution begins	July 1, 2022

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 Wednesday, March 23, 2022, 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.

Proposals must also be emailed to proposals@careersourcerc.com before 4:30 p.m. EST on March 23, 2022.

2. INQUIRIES

- a. Inquiries concerning the RFP should be directed to <https://careersourcerc.com/rfp-21-001-oso-one-stop-operator/>. All requests must be submitted via the CRSC 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 H - Rating Sheet for RFP #21-001-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. NEGOTIATIONS

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 April 27, 2022. Contract negotiations may commence any time following that date and are to be completed by Friday May 13, 2022 with an execution date of contract to begin July 1, 2022.

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CAREERSOURCE RESEARCH COAST COMPETITIVELY PROCURED SERVICE PROVIDERS & VENDORS

James Moore, CPA & Consultants

121 Executive Circle
Daytona Beach, FL 32114-1180

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

DRAFT

CAREERSOURCE RESEARCH COAST LDWB20 WORKFORCE BOARD MEMBERS

1. Werner Bols, President, Bols Construction
2. Jim Brann, President, The Porch Factory
3. Pamela Burchell, Director of Human Resources, Indian River Medical Center
4. Jose Capellan Veteran Services Manager, St. Lucie County Veteran Services
5. Helene Caseltine, Director of Economic Development, Indian River County Chamber of Commerce
6. Robert Cenk, Vice President, Homecrete Homes, Inc.
7. David Freeland, President, St. Lucie County CTA/CU
8. Wayne Gent, Superintendent, St. Lucie Public Schools
9. Jill Hanson, Director of Sales, Staybridge Suites
10. Lawrence Hawes, General Manager, Airburners, Inc.
11. Pamela Houghten, Chief Financial Officer, Houghten Biomedical Sciences, LLC
12. Leslie Kristof, President, Keiser University
13. Jeannie McCall, Director of Human Resources, Sandhill Cove Retirement Living
14. Dr. John Millay, Superintendent, Martin County School Board
15. Chris Dzadovsky, Commissioner, St. Lucie County Board of County Commissioners
16. Dr. David Moore, Superintendent, School District of Indian River County
17. Terrance Moore, CEO, Moore Solutions, Inc.
18. Dr. Timothy Moore, President, Indian River State College
19. Wayne Olson, VR Area Director, Vocational Rehabilitation
20. Debbie Perez, Senior Dir. Total Rewards & Talent Acquisition of Florida, Cleveland Clinic Martin Health Systems
21. Pete Tesch, Executive Director, St. Lucie County Economic Development Council

22. Angella Williams, VP of Human Resources, Treasure Coast Hospice

23. Maddie Williams, Executive Director, Treasure Coast Builder's Association

**CAREERSOURCE RESEARCH COAST, LWDB20,
TREASURE COAST WORKFORCE CONSORTIUM MEMBERS**

1. Susan Adams, Commissioner

Indian River County

2. Doug Smith, Commissioner

Martin County

3. Sean Mitchell, Commissioner

St. Lucie County

DRAFT

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

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.

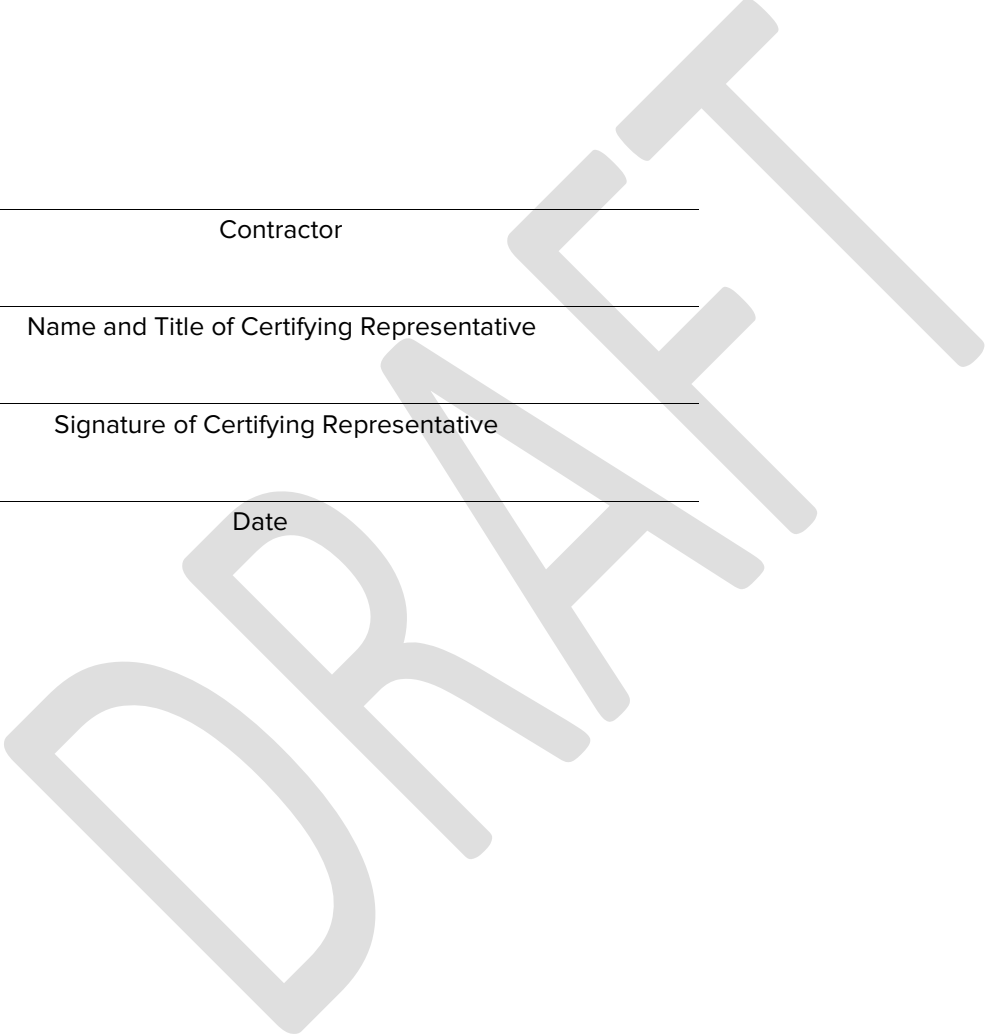
8. This agreement shall be construed in accordance with the laws of the State of Florida as may exist from time to time. The parties hereto agree to venue and jurisdiction in the courts of St. Lucie County, Florida for the resolution of all disputes connected hereto. In any event of any litigation to 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



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 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 F**).
- 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 CSRC's General Provisions & Assurances (**Attachment F**).

Proposer

Name and Title of Certifying Representative

Signature of Certifying Representative

Date

GENERAL PROVISIONS AND ASSURANCES

This attachment is part of the Subrecipient agreement held between The Workforce Development Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast (CSRC) and Subrecipient for described in the Agreement attached hereto. In consideration of the mutual covenant and stipulations set forth in the contract and Attachment herein, the parties hereby agree as follows:

1. COMPLIANCE WITH POLICIES AND LAWS

The warranty of this Section specifically includes compliance by Subrecipient 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: Subrecipient agrees that, if applicable, it shall comply with all applicable OMB circulars, such as 2 CFR 200. Subrecipient 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 DEBARMENT, SUSPENSION AND OTHER MATTERS

Subrecipient certifies that it is not currently debarred, suspended, or excluded from or for participation in Federal assistance programs, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency within a three-year period preceding the effective date of the Agreement in accordance with 29 CFR Parts 45, 74, 95 and 98. No contract shall be awarded to parties listed on the GSA List of Parties Excluded from Federal Procurement or Non-Procurement Programs.

3. NON-DISCRIMINATION, EQUAL OPPORTUNITY ASSURANCES, CERTIFICATIONS, OTHER PROVISIONS

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 based on race, color, religion, sex, national origin, age, disability, political affiliation, or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title I- 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 based on 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 Subrecipient also assures that it will comply with 29 CFR Part 37 and all other regulation implementing the laws listed above.

For contracts more than \$10,000, the Subrecipient 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.

4. 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 more than \$100,000, Subrecipient 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 Subrecipient shall report any violation of the above to the contract manager. Energy Efficiency: The Subrecipient 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).

Subrecipient 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 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 Subrecipient will comply with the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act (42 U.S.C. 6962).

5. CERTIFICATION REGARDING LOBBYING AND INTEGRITY

Subrecipient shall comply with the provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352) 29 CFR Part 93. When applicable, if this Agreement is more than \$100,000, Subrecipient must, prior to contract execution, complete the Certification Regarding Lobbying Form.

6. CONFIDENTIALITY

It is understood that the Subrecipient 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. Subrecipient 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 Subrecipient, if such release is required by Federal or State law, shall be construed as a breach of this Section.

7. 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.

8. 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, Subrecipient 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 Subrecipient expense, at reasonable locations as determined by CSRC. Subrecipient 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.

9. TERMINATION FOR DEFAULT/CONVENIENCE

This modified agreement may be terminated as follows:

- a. Either party may request termination of modified agreement upon 60 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. Subrecipient fails to provide any of the services it has contracted to provide; or
 - ii. Subrecipient 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 Subrecipient disagrees with the reasons for termination, they may file a grievance in writing within ten days of notice of termination to the CSRC Executive Committee, 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, Subrecipient shall be liable to CSRC for damages sustained for any breach of this modified agreement by the Subrecipient, including court costs and attorney fees, when cause is attributable to the Subrecipient.

In instances where Subrecipient violates or breaches 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.

10. PUBLIC ANNOUNCEMENTS AND ADVERTISING

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

11. PUBLIC ENTITY CRIMES

Subrecipient shall comply with subsection 287 .L33(2)(a), F.S., whereby a person or affiliate who has been placed on the convicted Lessor list following a conviction for a public entity crime may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a Lessor, supplier, sub-Lessor or consultant under a contract with any public entity and may not transact business with any public entity in excess of the threshold amount provided in section 287.Ot7, F.S., for Category Two for a period of thirty-six (36) months from the date of being placed on the convicted Lessor list.

12. THE PRO-CHILDREN ACT

Subrecipient agrees to comply with the Pro-Children Act of 1994, 20 U.S.C. 6083. Failure to comply with the provisions of the law may result in the imposition of civil monetary penalty up to \$1,000 for each violation and/or the imposition of an administrative compliance order on the responsible entity. This clause is applicable to all approved sub-contracts. In compliance with Public Law (Pub. L.) LO3-277, the Contract shall not permit smoking in any portion of any indoor facility

used for the provision of federally funded services including health, day care, early childhood development, education, or library services on a routine or regular basis, to children up to age 18.

13. PROCUREMENT OF RECOVERED MATERIALS

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

14. DOMESTIC PREFERENCES FOR PROCUREMENTS

Subrecipient agrees to comply with the provisions of 2 CFR Appendix II to part 200 and 2 CFR part 200.322 and the requirements stated therein.

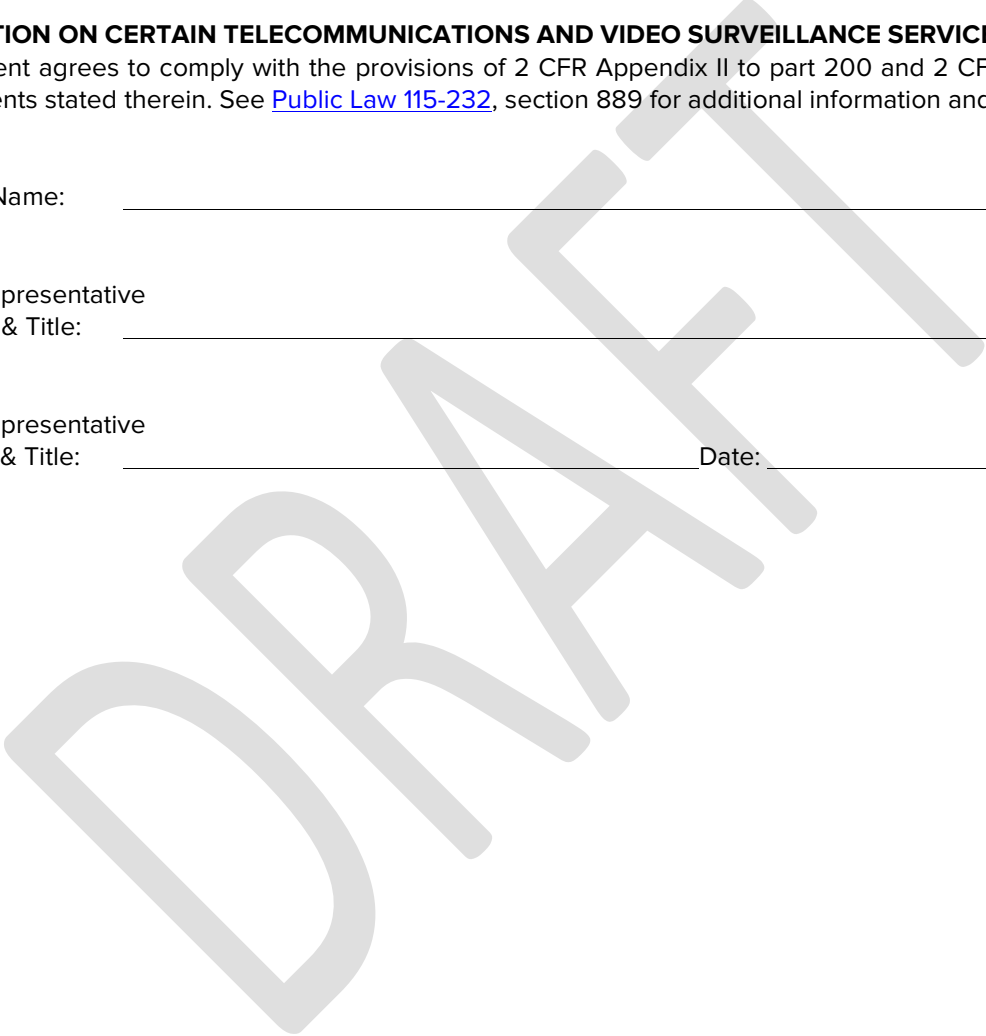
15. PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT

Subrecipient agrees to comply with the provisions of 2 CFR Appendix II to part 200 and 2 CFR part 200.216 and the requirements stated therein. See [Public Law 115-232](#), section 889 for additional information and 2 CFR part 200.471.

Subrecipient Name: _____

Authorized Representative
Printed Name & Title: _____

Authorized Representative
Signed Name & Title: _____ Date: _____



INITIAL TECHNICAL REVIEW – ONE-STOP OPERATOR RFP #21-001-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: _____

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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: _____

6. Conduct, at 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 1-6):

(Total)

RATED BY: _____
Signature

Other comments or concerns: _____

AGENDA ITEM SUMMARY

Title	Career Center Extended Hours Pilot
Strategic Plans/Goals	Optimal Use of Resources
Policy/Plan/Law	Productive, Collaborative Plan for Florida's Research Coast
Action Requested	Review Career Center Extended Hours Pilot
Background	<p>DEO addressed the role of the LWDB's staff in supporting unemployed Floridians and re-employment assistance claimants, utilizing enhanced communication and customer service. To address the needs of DEO re-employment assistance for our LWDA, CSRC recommended expanding our regular work hours schedule for our career centers as a pilot project. CSRC regular work schedule 8:00am to 5:00pm, Monday through Friday now includes Saturday hours of 8:00am to 1:00pm. The intent of this pilot is to offer RA claimants the ability to receive services outside of the normal work week. The pilot began during the month of September. CSRC prepared a marketing campaign marketing this pilot to include our social media platforms. CSRC is looking to have pilot run through the end of the calendar year based on foot traffic.</p>
Staff Recommendations	Review Career Center Extended Hours Pilot
Supporting Material	N/A
Board Staff	<p>Brian Bauer President/CEO bbauer@careersourcerc.com (866) 482-4473 ext. 418</p>