

CareerSource

Central Florida

Local Workforce Development Area 12

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INTRODUCTION

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

CareerSource Central Florida (CSCF), the local workforce development board for Lake, Orange, Osceola, Seminole and Sumter counties, four-year plan (2016-2020) was based on current and projected needs of the workforce investment system, and an increased emphasis on coordination at all levels to ensure a seamless system for employers and job seekers, including those with disabilities. Assessment information, evidence of effectiveness, and performance information for specific service models and a plan to improve program delivery have been reviewed, adjusted, and provided in this plan for adoption. The plan modification also further articulates actions to coordinate service delivery and reduce duplication of services with core programs through the Division of Vocational Rehabilitation, the Division of Blind Services and the Division of Adult Education and Family Literacy.

CSCF presents the following plan modification to address how the organization has moved toward fostering strategic alignment, improving service integration, and ensuring the workforce system is industry-relevant, responding to the economic needs of the local workforce development area and matching employers with skilled workers. CSCF strives to align with CareerSource Florida's business and market-driven principles to be the global leader for talent. These principles include:

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

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

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

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

- Enhance alignment and market responsiveness of workforce, education and economic development systems through improved service integration that provides businesses with skilled, productive, and competitive talent and Floridians with employment, education, training and support services that reduce welfare dependence and increase opportunities for self-sufficiency, high-skill and high-wage careers and lifelong learning.
- Promote accountable, transparent and data-driven workforce investment through performance measures, monitoring and evaluation that informs strategies, drives operational excellence, leads to the identification and replication of best practices and empowers an effective and efficient workforce delivery system.
- Improve career exploration, educational attainment and skills training for in-demand industries and occupations for Florida youth that lead to enhanced employment, career development, credentialing and post-secondary education opportunities.

CAREERSOURCE ORGANIZATIONAL STRUCTURE

(1) Chief Elected Official(s) (CEO):

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

Consortium Chair & Orange County Representative: Mayor Teresa Jacobs 201 S. Rosalind Ave. County Administration Building Orlando, FL 32801-3527	(407) 836-7370	Mayor@OCFL.net
Lake County Representative: Commissioner Leslie Campione P.O. Box 7800 (Mailing Address) 315 W. Main St. Tavares, FL 32778	(352) 343-9850	lcampione@lakecountyfl.gov
Osceola Representative: Commissioner Brandon Arrington 1 Courthouse Square, Suite 4700 Kissimmee, FL 34741-5440	(407) 742-2000	brandon.arrington@osceola.org
Seminole Representative: Commissioner Lee Constantine 1101 E. First St. Sanford, FL 32771-1468	(407) 665-7209	lconstantine@seminolecountyfl.gov
Sumter Representative: Commissioner Al Butler 7375 Powell Rd. Wildwood, FL 34785	(352) 689-4400	al.butler@sumtercountyfl.gov

The Workforce Development Board of Central Florida (Board) d/b/a CareerSource Central Florida (CSCF) is a private not-for-profit corporation registered under Section 501(c)(3) of U.S. Internal Revenue Code and serves Region 12 - a five-county area that includes Osceola, Orange, Seminole, Lake and Sumter Counties. A Board of Directors comprised of volunteers,

represented by majority private sector business, economic development, education, organized labor, community-based organizations, veterans, and state and local government agencies representing all five counties in the region, governs CSCF. Joint oversight is provided through an agreement between the CareerSource Central Florida Board of Directors and County Commissioners from each of the five counties in Region 12, which make up the region's Workforce Consortium. The Consortium oversees CareerSource Central Florida.

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

The Inter-local Agreement outlines the roles and responsibilities of the chief elected officials of each of the counties represented by CSCF. Each county's legal counsel reviewed the agreement to ensure the intent and responsibilities outlined in WIOA were clear and acceptable to each governing body. *Please see Attachment A.*

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

Please see Attachment A.

Q (D). Describe the by-laws established by the Chief Elected Official(s) to address the criteria contained in §679.310(g) of the proposed WIOA regulations:

- i. The nomination process used by the CEO to elect the local board chair and members;
- ii. The term limitations and how the term appointments will be staggered to ensure only a portion of membership expire in a given year;
- iii. The process to notify the CEO of a board member vacancy to ensure a prompt nominee
- iv. The proxy and alternative designee process that will be used when a board member is unable to attend a meeting and assigns a designee as per the requirements at §679.110(d)(4) of the proposed WIOA regulations;
- v. The use of technology, such as phone and Web-based meetings, that will be used to promote board member participation;
- vi. The process to ensure board members actively participate in convening the

workforce development system's stakeholders, brokering relationships with a diverse range of employers, and leveraging support for workforce development activities; and

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

CareerSource Central Florida's Board Governance Committee (i.) annually reviews officer candidates and provides a slate of officers for recommendation to the Board of Directors for discussion and a vote. The Governance Committee is engaged in recruiting potential Board Members who meet the required categories as outlined by the Workforce Innovation and Opportunity Act. Individuals who are interested in serving on the Board of Directors are nominated by business or other community organizations and presented to the Local Elected Consortium for consideration and appointment. Consortium members review candidate qualifications and interest in serving prior to approving an appointment. Appointments to the Board are voted by the Consortium members at the bi-annual meetings.

Each Board members is (ii.) appointed for a three-year term, beginning July 1 and terminating June 30 in three years hence. (iii) If a seat is not filled, a Director may serve until December of the last term or until action regarding the seat is taken, whichever comes first. Subject to applicable law, one third of all terms will expire annually.

(iv.) CSCF bylaws do not provide for proxy or designee to Board members. (v.) CareerSource Central Florida Board of Directors may participate in a meeting via telephone or other conferencing method by which all members can communicate and participate. Conference phone capabilities are provided at all Board and Committee meetings and is accessible to any member who cannot attend in person and to the public. *See Attachment B for the Board's bylaws.*

(vi.) The CareerSource Central Florida Board of Directors actively engages stakeholders through:

- focus groups with key representatives of high growth industries;
- informational presentations on high growth industry trends by industry leaders;
- conversation and information sharing with economic development partners, such as the Orlando Economic Partnership, local chambers, the University of Central Florida's School of Business; industry advisory groups; and
- the Board's business and required members.

(vii.) There are no other conditions that govern membership or appointment to the Board.

Q (E). Provide a description of how the Chief Elected Official(s) is involved in the development, review and approval of the local plan and its two-year modification.

At the bi-annual Joint Consortium and Board Meetings, the Board regularly discusses its goals and strategies with the Chief Elected Officials. Additionally, senior CSCF leaders meet at least quarterly with Consortium members' staff to present updates on planned activities, enhanced collaborations, and system outcomes.

The Chief Elected Officials Consortium has designated a Chair to act on behalf of the Consortium and to work with the CSCF Board Chair to review and approve items as required. Members of the Consortium received a draft copy of the plan and are provided a single point of contact at CSCF to receive their feedback. Orlando County Mayor – The Honorable Teresa Jacobs – will work with CareerSource Central Florida Board Chair and President & CEO to finalize the plan update and present for adoption at it June 2018 meeting.

(2) Local Workforce Development Board (LWDB)

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

Local Workforce Development Board Chair:

Debbie Clements, Duke Energy
c/o CareerSource Central Florida
390 N. Orange Avenue, Suite 700
Orlando, FL 32801
Debbie.clements@duke-energy.com

Local Workforce Development Board Vice-Chair:

Mark Wiley
Central Florida Chapter Associated Builders and Contractors, Inc.
c/o CareerSource Central Florida
390 N. Orange Avenue, Suite 700
Orlando, FL 32801
mwylie@abccentralflorida.org

Q (B). Provide a description of how the LWDB was involved in the development, review, and approval of the local plan and its two-year modification.

For the past five years, the CareerSource Central Florida Board of Directors has dedicated itself to building an organization that will make Central Florida the best destination for talent. A complete overhaul of the organization's leadership, both at the Board and Staff level, has led to the highest level of fiduciary and programmatic checks and balances. The Board is structurally sound and well prepared to increase its focus on improving its response to labor market needs and connecting Board performance to outcomes outlined in WIOA. This Board along with key staff has committed to annual retreats that are structured to establish goals and objectives that are tied to specific performance metrics. The Board reviews achievement of those metrics through its efficient committee structure that reports at each meeting of the Board of Directors.

CareerSource Central Florida Board Strategies	Raise the profile of CareerSource Central Florida by convening business for education and awareness.	Create a business-driven system supported by all providers that is intentional, focused, and coordinated.	Plan for ongoing board-level planning discussion to ensure a balance of board member responsibility to oversight and insight, and define what it will mean for the Board to become an innovative thought leader on workforce development.
	Implement an education and outreach plan to increase business' awareness on workforce development issues and talent development opportunities. Engage each Board Member for quality referrals to obtain new business opportunities and raise the profile of CSCF. Formalize an ad hoc group to create a process for feedback to the Board on the referral process. Validate assumptions about business needs through formal and informal processes, and analyze results to deliver market-defined services. Convene strategic events for business that provide value to attendees and opportunities for CSCF Business Service staff to make new connections.	Support and champion the need for a comprehensive workforce system in Central Florida. Conduct a regional inventory of workforce programs and services to identify potential partners and areas of duplication. Research and inventory current programs and outcomes tied to high growth industries. Convene a collective group of key regional non-profit organizations' Board Chairs and staff to discuss and create a shared vision and approach to develop the talent supply for business.	Continue to structure Board agendas and meetings to address oversight and allow time for Board members to gain insight by providing business intelligence on industry needs / trends, economic factors, and talent supply needs. Conduct an annual retreat that is sufficient in length to fully engage Board members in discussion on goals, strategies, and organizational performance.
	Continue advocacy for the workforce system as a valuable resource that can support and enhance business growth.	Reshape current career centers to link to high growth industries through targeted strategies that connect business to needed talent. Create youth engagement centers that provide comprehensive services and support youth connection to high growth industries. Engage local youth providers to develop a shared vision and strategy to help young people become more connected to educational opportunities, jobs and careers.	

As part of its work to further outline the organization's goals, the Board is currently engaged in a strategic planning process to assist in the further development of its priorities that align to key customer groups. The Board's strategic goals (see table above) lay the foundation for strategically positioning the organization within the Central Florida region.

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

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

The Workforce Development Board of Central Florida (Board) d/b/a CareerSource Central Florida (CSCF) serves as both the administrative and fiscal entity to receive and disburse funds.

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

CSCF is responsible for staffing the local board staff and the operational staff to deliver services to business and career seekers.

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

CSCF's submitted a request in 2014 to CareerSource Florida through the Department of Economic Opportunity (DEO) for a waiver to continue to provide services, including training, to career seekers. As part of the requirement to validate performance of the delivery model, CSCF submits a program status report to DEO for review and approval to continue its operating model. Attachment C of this plan includes the initial request to CareerSource Florida and subsequent performance report submitted in 2017 to DEO.

The Board has a process for declaring conflict for matters relating to procurement and policy, which is provided to all Board members during training and its annual refresher training. CSCF is very diligent in managing its internal procurement process to minimize conflicts of interest. The policy is provided in this plan – *Description of One Stop System*.

(4) One-Stop System

Q (A). Provide a description of the local one-stop system (including the number, type and location of the comprehensive center(s), and other service delivery points).

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

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

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

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

Q (F). Pursuant to the CareerSource Florida Administrative Policy for One-Stop Certification, provide the required attestation that at least one comprehensive one-stop center in the local area meet the certification requirements.

CareerSource Central Florida currently offers services to business and career seekers through one full-service center, four affiliate centers, and an administrative office. (B) The centers are open Monday- Thursday, 8 a.m.-5 p.m., Fridays 9 a.m. – 5 p.m., and after hours as needed. (C) CareerSource Central Florida currently operates all career centers and (D) delivers business and talent development activities, including youth services via its centers. (E) CSCF does not have contracted service providers that offer career services. (F) Currently, the West Orange County One-Stop Career Center is in development to meet and continue to meet the certification requirements as outlined in CareerSource Florida's Administrative Policy. Over the next 18 months, CSCF will be reviewing and analyzing the delivery models of its locations to ensure services meet the needs of career seekers and business in the county.



ANALYSIS OF NEED AND AVAILABLE RESOURCES

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

- A. Information on existing and emerging in-demand industry sectors and occupations; and**
- B. The employment needs of employers in those industry sectors and occupations (WIOA §108(b)(1)(A)).**

In 2016, CSCF selected six key industries to align its talent development resources to address the current and emerging needs of business. According to the University of Central Florida Institute for Economic Competitiveness, College of Business Administration 2015-2018 Florida and Metro Orlando Forecasting report, the sectors that were expected to have the strongest average job growth in Florida were:

- Construction (6.7%)
- Professional and Business Services (3.6%)
- Trade, Transportation & Utilities (3.6%)
- Education and Health Services (2.7%)
- Leisure & Hospitality (2.5%).

A review of the University of Central Florida Institute for Economic Competitiveness, College of Business Administration 2017-2021 Florida and Metro Orlando Forecasting report, confirm that the target industries chosen in 2016 continue to lead in growth for the Metro Orlando area. According to the UCF 2017-2021 report, Construction is expected to be the fastest growing sector in the Metro Orlando area, averaging 6.5 percent growth annually. The Professional and Business Services sector will see the second highest average annual growth rate at 6.0 percent, followed by the Financial and Other Services sectors at 3.2 and 2.1 percent average annual growth, respectively. The Federal Government sector will experience a decline, contracting at an average rate of -0.2 percent per year. Leisure and Hospitality continue to have steady growth to support the more than 106 million visitors to the region. CSCF's focus areas as outlined also align to four of the eight industries identified by the state legislature – Manufacturing, Financial & Professional Services, Logistics & Distribution, and Healthcare – through the Florida Chamber Foundation, Florida Jobs 2030 plan.

Based on December 2017 FL Department of Economic Opportunity Bureau of Labor Statistics data, the industries that continue to grow, align with the targeted industries previously outlined in our plan, however, new projections indicate that the “gig” economy – which is an “unknown” in how it will change the job market – will grow by 12.9%.

As we look into the occupations that continue to have the greatest supply gap by industry, they include:

- Construction: cement masons and finishers, brick and block masons, roofers, plaster and stucco masons, construction laborers;
- Professional and Business Services: insurance claim adjusters, examiners, loan officers; accountants;
- Information Technology: application software developers, web developers, computer systems analyst;
- Trade, Transportation and Utilities: electrical power line installers and repairers; cargo and freight agents
- Education and Health care: registered nurses, physical therapist, medical sonographers, surgical technologist, and medical equipment repairers; STEAM teachers; special education teachers;
- Leisure & Hospitality: frontline supervisors of personal services or food services; meeting, convention, and event planners; chefs and head cooks; and
- Advanced Manufacturing: sales representative in manufacturing / technical scientific products, maintenance and repair workers, frontline supervisors of mechanics, industrial machinery mechanics.

Jobs by Industry Growth				
Workforce Development Area 12 - Lake, Orange, Osceola, Seminole and Sumter Counties				
	2017 Employment	2025 Employment	Total	Percent
Education and Health Services	158,738	196,554	37,816	23.8
Construction	74,163	87,552	13,389	18.1
Leisure and Hospitality	263,785	302,384	38,599	14.6
Professional and Business Services	215,814	245,736	29,922	13.9
Self-Employed and Unpaid Family Workers	93,686	105,731	12,045	12.9
Financial Activities	77,763	87,026	9,263	11.9
Trade, Transportation, and Utilities	240,256	267,267	27,011	11.2
Other Services (Except Government)	60,522	66,403	5,881	9.7
Government	130,058	141,423	11,365	8.7
Manufacturing	44,369	46,263	1,894	4.3
Information	24,379	25,249	870	3.6
Mining	281	268	-13	-4.6
Agriculture, Forestry, Fishing and Hunting	5,214	4,900	-314	-6.0

Source: FL Department of Economic Opportunity, Bureau of Labor Statistics, December 2017

Understanding changes in supply and demand is critical to CSCF's ability to address the region's talent development needs. With an intentional focus on this data, CSCF can shift its resources when, and if, the talent supply is exceeding demand, and emerging needs are identified.

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

Regardless of the industry that CSCF engages in discussion about the skills needed to be competitive, many businesses and industry leaders share their experiences and challenges with recruiting talent that understands the importance of company culture, appropriate workplace behaviors, customer services skills and commitment to continual learning. Companies share that they seek candidates with “interpersonal and people skills” when hiring for most positions. Indeed.com, the leading job site, has shared the most valuable seven soft skills for job seekers and employees:

- **Acting as a team player** – not only being cooperative, but also displaying strong leadership skills when necessary.
- **Flexibility** – this is an extremely valuable asset to employees. Those who can adapt to any situation are dependable.
- **Effective communication** – this is paramount to almost any job. Communication involves articulating oneself well, being a good listener and using appropriate body language.
- **Problem-solving and resourcefulness** – no matter what your profession, these skills are critical when unexpected issues inevitably arise.
- **Accepting feedback** – not only accepting feedback gracefully but also applying that feedback, fosters professional growth.
- **Confidence is key** – it's also important to always have the knowledge and skills to support self-assurance. By being confident and capable, supervisors, employees, and clients believe in what you are saying.
- **Creative thinking** – being able to come up with unique solutions or alternatives is invaluable; it drives innovation and increases efficiency.

Feedback from employers is also validated with the advertised job skills found in job openings advertised on line (Help Wanted Online - HWOL). A review of HWOL jobs found that the top five skills required by employers were: customer service, problem solving, interpersonal skills, flexibility, and ability to be a team player. CSCF continues to seek innovative to incorporate these skill areas into its soft skills training options for job seekers.

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

In Central Florida's five counties – Lake, Orange, Osceola, Seminole, and Sumter – there are diverse cultural and demographic communities. The region is estimated to be home to more than 2.4 million residents by 2020 (Source: U.S. Census Bureau, American Community Survey 2016) and continues growing with the recent migration of Puerto Ricans to Orlando and Kissimmee areas, as well as immigrants from around the world and new residents attracted to Florida's geographic location. According to the Migration Policy Institute, three-quarters of Florida's immigrant residents ages 16 and over hail from Latin America, as compared to 53% nationwide; only 10% are of Asian origin; and 10% are European. The diversity in languages has also grown, with almost 25% of the region's residents speaking Spanish, 2.3% of residents speaking Creole, and 3% of residents speaking Asian and Pacific Islander languages.

The Central Florida region continues to see a continued decline in the unemployment rates. The unemployment rate in the CareerSource Central Florida region (Lake, Orange, Osceola, Seminole, and Sumter counties) was 3.5 percent in November 2017, down a percentage point from November 2016 (See table below) . There were 1,280,869 individuals in the labor force, there were 46,322 unemployed residents in the region; however, the number is not reflective of those individuals who have stopped seeking employment or those who have simply taken themselves out of the labor force (See table below). About 57,300 individuals with disabilities

Local Area Unemployment Statistics by Workforce Region (Not Seasonally Adjusted)												
Region	November 2017				October 2017				November 2016			
	Labor Force	Employment	Unemployment Level	Unemployment Rate	Labor Force	Employment	Unemployment Level	Unemployment Rate	Labor Force	Employment	Unemployment Level	Unemployment Rate
WDA 12	1,327,201	1,280,869	46,332	3.5%	1,329,210	1,286,701	42,509	3.2%	1,294,179	1,236,299	57,880	4.5%
Source: U.S. Bureau of Labor Market Statistic, LAUS program.												
Region	Labor Force Status (2016 Estimates)											
	Persons with Disability			Labor Force Status by Race: American Indian and Alaska Native			Labor Force Status by Race: Native Hawaiian and Other Pacific Islander			Labor Force Status for Persons Aged 55 and Older		
	Labor Force	Unemployment	Unemployment Rate	Labor Force	Unemployment	Unemployment Rate	Labor Force	Unemployment	Unemployment Rate	Labor Force	Unemployment	Unemployment Rate
WDA 12	57,278	10,110	17.7%	2,995	506	16.9%	695	7	1.0%	234,806	14,200	6.05%
Region	Educational Attainment for the Civilian Labor Force Aged 25 - 64 (2016 Estimates)											
	Less than high school graduate:	High school graduate (includes equivalency):	Some college or associate's degree:	Bachelor's degree or higher:								
	128,073	340,558	425,897	394,603								
WDA 12	9.9%	26.4%	33.0%	30.6%								
Source: U.S. Census Bureau, American Community Survey. Prepared by: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, January 2018.												

who are within working age are unemployed, with the population posting an almost 18% unemployment rate. Under WOA, CSCF also identified an opportunity to support those

individuals who are underemployed or are currently in income-maintenance jobs who wish to move back to the industries from which they were displaced.

WIOA mandates that individuals with barriers to employment defined as: low-income, basic skill levels below 8.9 grade level, individuals with disabilities, out-of-school youth, and individuals whose primary language is not English, have access to programs and services that assist in removing those barriers to successfully enter employment in a career pathway.

Education levels of potential candidates who are registered and utilize Employ Florida Marketplace (EFM), the state's labor exchange system, in program year 2017 underscores the need to advocate for increased education and skill development of Central Florida residents, as 5% of candidates have no high school diploma; 63.4% have a high school diploma or some college; 16.3% a BA/BS degree; 5% a master's degree or higher. Although graduation rates have increased in the region, with Seminole County having the highest rates with 88.6%, estimates indicate that approximately 4,500 youth do not graduate high school every year within the region, and does not account for those youth who left secondary school prior to their senior year in high school (Florida Department of Education Updated 2016).

As employers increasingly seek talent with technical skills and there are more opportunities for middle-skilled jobs, CSCF will work to strategically identify new talent pipelines to facilitate connection to the region's employers, and identify strategies to increase skills levels for the region's talent currently earning less than \$15 per hour. CSCF is also interested in working with its education and community partners to identify strategies that help reconnect young people to opportunities to earn a high school diploma, connect to post-secondary training or education, and college graduates who are not able to connect to employment opportunities, and a first career.

In the State of Florida, approximately 7,500 Individuals with Disabilities are registered with the Division of Blind Services and the Division of Vocational Services and, according to these organizations, an estimated 20,000 unregistered disabled individuals and disabled Veterans live in the region. Employed individuals with disabilities are underrepresented in management, professional, and technical jobs, compared with an overrepresentation in service, production, and transportation jobs. Further, individuals with disabilities, while educated, are not often considered for STEM-related occupations. CSCF will partner with employers, vocational rehabilitation, and community agencies to support increased options for viable employment.

Q 4. Please provide a description and assessment of the type and availability of adult and dislocated worker employment and training activities in the local area (WIOA §108(b)(7)).

The WIOA Adult program is one of three Core Title I programs authorized under WIOA designed to assist participants in attaining employment. This program is specifically targeted toward individuals, 18 and older, who are in need of training, employment, and career advancement. Dislocated Worker programs assist workers who have been displaced due loss of work, and can include activities such as on-the-job training and work experience to facilitate rapid re-employment. As part of its process, CSCF Career Consultants meet with customers to understand their employment needs and assess skills, both soft skills and technical skills. The system utilizes several online tools including TABE, Provelt, Metrix Learning system, Work Keys assessment in Employ Florida, Virtual Jobshadow, and CareerScope.

CSCF offers a variety of training activities for adults and dislocated workers that includes: career planning, job placement assistance, training, and work-based learning opportunities such as internships and on-the-job training. With the new requirements and expectations under WIOA, CSCF has evaluated its policies, procedures, and strategies to better address the skill gaps identified by employers.

CSCF has identified the following strengths of its current activities:

- The system currently offers a variety of options for talent development – internships, training, and on-the-job training – based on career seeker's needs.
- A diverse secondary and post-secondary education and training network exists in the region that supports WIOA eligible participant's access to skill-building skills in demand occupations.
- Collaboration with diverse community partners, non-profit agencies, economic development organizations, and community action and neighborhood organizations that provide employment readiness and training services to remove significant barriers to employment.
- An innovative call center to provide frontline services including scheduling, state system account support for customers, SNAP and TANF case status support, and information on key services.

- Promising partnerships with its WIOA core and mandatory partners focused on collaboration and coordination of services through the region's full-service One Stop and its other Career Centers as appropriate.
- A youth program that is driven by strong relationships with participants and dedicated efforts to engage business interested in mentoring and hiring this population.

CSCF has identified the following opportunities for improvement:

- Continue to increase the number of training completers who enter into a training-related employment opportunities.
- Integrate and align workforce programs to serve specific populations, such as Temporary Assistance for Needy Families (TANF) and Supplemental Nutrition Assistance Program.
- Develop data collection strategies that support organization goals and align to activities that position the organization to the achieve negotiated federal measures.
- Increases collaboration with apprenticeship programs to increase access to training to underrepresented populations.

Q 5. Please provide a description and assessment of the type and availability of youth workforce investment activities in the local area, including activities for youth who are individuals with disabilities. The description and assessment must include an identification of successful models of such youth workforce investment activities (WIOA §108(b)(9)).

CareerSource Central Florida's goal is to prepare youth and young adults for successful careers through continued education and work-based learning in targeted industries. Under WIOA, services to youth and young adults are now focused on individuals who are considered out-of-school and between the ages of 16 and 24. Of a region's youth formula funds, 75% must be spent on out-of-school youth individuals, and 20% of its funds must support work experience activities. Youth programming under WIOA is designed to serve eligible youth and young adults through high-quality case management support toward educational attainment that includes career guidance and exploration, summer and year-round work experience, and skills training along a career pathway for in-demand occupations, along with support services.

In 2016, CSCF began providing services to qualifying youth and young adults, and has served approximately 1000 young people per program year (July 1-June 30). CSCF continues to implement a service delivery models that works with young people where they are in their development and supports their engagement in the 14 required program elements as outlined in WIOA §129(c)(1)(2). CSCF's model includes designated business consultants to find youth appropriate employment opportunities. Additionally, new Youth Navigators were procured to provide additional outreach and support to WIOA targeted populations – youth with disabilities, justice-involved youth, teen parents, urban youth, and other underserved populations. The Youth Navigators identify eligible youth, support enrollment into program activities, and coordinate with CSCF youth consultants to provide services. CSCF will ensure the provision of services by procuring education, training, and youth development-type services as needed.

CSCF seeks to continue to develop and implement a youth program model that include multi-year services that focus on career pathways that target high growth sectors – Healthcare; Advanced Manufacturing; Construction; Business and Professional Services; Trade, Transportation & Utilities; Leisure & Hospitality– and are supported by culturally competent career coaches who are proficient in workforce development and youth engagement principles. CSCF has implemented the use of individual training accounts for education and training for youth and has seen an increase number of youth engage in those activities and earn meaningful credentials. In PY 16-17, 352 number of youth entered employment or entered post-secondary, 315 number of youth earned a credential, and 57 youth earned a high school diploma.

CSCF partners with community organizations, secondary school partner, post-secondary institutions, and vocational rehabilitation to identify best practices to support youth with disabilities transition to training and/or employment. CSCF will continue to partner with the Greater Orlando Inter-Agency Council - a collaborative effort comprised of community organizations, schools, and vocational rehabilitation - to better understand how to coordinate services and address challenges for youth with disabilities. Additionally, CSCF's One Stop Operator is focused on creating referral and coordination processes with vocational rehabilitation to increase access to services and achieve common outcomes.

The Department of Juvenile Justice (DJJ) and Department of Economic Opportunity entered into a statewide Memorandum of Agreement in January 2015 to establish general conditions

and joint processes that will enable each agency to collaborate as partners to ensure juvenile offenders under the supervision of DJJ have information about and access to services provided by the state's workforce system. CSCF is working with Circuit 5, 9, and 18 to develop a referral system with agreements to share information with probation officers who are working with youthful offenders. Training workforce staff on the juvenile justice and corrections process is expected to be completed by June 2018, and continue on a bi-annual basis. DJJ and workforce staff will work collaboratively to provide work preparation services to this targeted population.

CSCF will continue to research best practices that align with the region's urban, suburban and rural demographics to design a collaborative approach that will lead to an increase the number of youth and young adults who gain industry-relevant skills and enter employment, military, apprenticeship, or post-secondary training / education.

WORKFORCE DEVELOPMENT AREA VISION AND STRATEGIC GOALS

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

Through Board of Director's meetings and retreats, the Board's discussions have focused on its oversight and insight responsibilities, and how the organization must move from a compliance-oriented oversight body to a regional organization recognized as the thought leader, convener and catalyst for developing a business-driven workforce system that is intentional, focused and coordinated. The Board has developed and has focused over the last two year on the following strategic priorities to guide its work over the last two years:

- CareerSource Central Florida will become business focused in all efforts;
- CareerSource Central Florida will identify ways to measure progress and return on investment (ROI).
- CareerSource Central Florida will become the backbone organization for workforce development in the Central Florida region.

The Board's strategies focus on improving engagement and service delivery to the region's niche career seeker and business customers, and creating a system that is responsive to talent needs, thereby increasing employment, wage gain, and retention indicators. Through the Board's strategy to realign recruitment and training opportunities to those high growth industries, individuals with barriers to employment and youth / young adults will access intentional services and training to better prepare them with the skills necessary for the current and emerging workplace.

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

The core programs under the Act are WIOA programs for Adults, Dislocated Workers, Youth; Adult Education and Family Literacy programs; Vocational Rehabilitation; Division of Blind Services; and Wagner Peyser services. The Act requires state and local provider organizations to collaborate in order to achieve better results in connecting key populations into the workforce and building career paths that will allow individuals to stay connected to jobs and sustainable careers. Representatives of core and mandatory partners, participate at both the Board and Committee levels and participate in strategic discussions to better align the workforce system and engage in new approaches needed to meet the service and performance requirements of WIOA.

CareerSource Central Florida identified the need to create a new demand-driven system supported by all providers that is intentional, focused and coordinated. As such, the Board has adopted this as one of its strategic priorities, which is a primary oversight role for the Career Services Committee. Representatives of core programs continue to be identified to participate on the Board and join Board committees through the Board's Governance Committee. To date, representatives of the Division of Blind Services, Adult Education and Family Literacy, and Career and Technical Education, and Department of Children and Families programs participate in Board and Committee-level activities. CSCF, working with its One Stop Operator, will continue to work with each core partner to understand their organizations' missions, process, and strategies to then develop opportunities for alignment.

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

The CareerSource Central Florida Board of Directors has dedicated itself over the last three years to building an organization that will make Central Florida the best destination for talent. The Board has implemented an efficient Board structure with focused committees that have established charters for their area of work. There are specific metrics that each committee has established and monitors as part of its oversight responsibilities. The Board reviews state program and fiscal audit reports, as well as external fiscal compliance monitoring, through its committee structure and reports notable findings, observations, and/or best practices to the full Board. Through Board meeting, Directors review established goals, objectives, and performance metrics to ensure alignment with business and talent development initiatives.

The Board provides oversight and leadership on “policies affecting the coordinated provision of services through (its) one-stop delivery system, including policies concerning objective criteria for the Board to assess one-stop centers, guidance for the location of one-stop center infrastructure funds, and policies relating to the roles and contributions of one-stop partners within the one-stop delivery system” (§ 101(d)(6) of WIOA). CSCF has developed this plan with the understanding that portions of this plan continue to evolve and modifications to its annual activities will be made based on the experiences gained by implementing it strategies.. CSCF will also continue to work with the Florida Sterling Council to implement a management framework consistent with Baldrige Criteria that will assist the organization in aligning its leadership and strategies to its workforce, operations, and results. Integration of these areas will result in clear processes that lead to better management of performance.

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

CareerSource Central Florida recognizes the unique barriers individuals with disabilities may face in finding a job or engaging in a meaningful career. The goal is to ensure that all job seekers are competitive, regardless of barrier. CSCF will continue to invest and participate in local and state initiatives to connect these individuals to employers who are ready to hire, while making an intentional effort to not duplicate work by other partners, including vocational rehabilitation. Below are some of the activities CSCF will continue to support and implement services that intentionally provide resources and assist individuals with disabilities in gaining employment. CSCF has also solidified its partnership with the

Central Florida Disability Chamber through its participation of a CSCF senior leader on its Board of Directors.

- **Ticket to Work** – CSCF is one of 17 Florida LWDBs designated as an Employment Network provider by the Social Security Administration enabling its participation in the federally funded Ticket to Work program. Through Ticket to Work, recipients of Social Security Disability Insurance and/or Supplemental Security Income receive priority assistance such as job search, career planning and skill building to enhance their efforts to find and retain a job, and work toward becoming self-sufficient. Participating LWDBs receive funding for workforce services provided to “ticketholders” from the Social Security Administration. CSCF has expanded staff knowledge of the program and improved how data is collected to measure the impact of the services provided. Moving forward, the organization will identify staff to engage in training to support social security benefit analysis through a Additionally, CSCF is working with Vocational Rehabilitation and the Division of Blind Services to understand the services they offer as Ticket to Work network partners, how to improve referrals to their services, and better provide shared services for Ticket holders.
- **Family Café** – CSCF continues to support the annual Family Café that attracts about 7,000 Floridians with disabilities and their families. It provides a forum for the CareerSource Florida network to offer employment workshops and educate individuals with disabilities and their families about how to access local workforce services and special resources through career centers such as incentives for businesses that hire people with disabilities.
- **Veteran’s Business Initiative** - CareerSource Central Florida has joined in partnership with the Central Florida Disability Chamber of Commerce, Manpower, Regions Bank, and Florida Hospital in presenting the Veterans’ Business Initiative, or VBI. Now in its fourth year, this free, eight-week program combines workshops, presentations, interactive discussions, and role-playing scenarios to assist veterans with everything from resume writing and interview preparation to networking sessions and interviews with local companies. The Veterans Business Initiative provides veterans with entrepreneurship opportunities, employment, continuing education, and invaluable access to local company hiring managers. The program is available to all US Military Veterans, whether disabled or not.

Other populations identified in Section 188 of WIOA, such as English Limited or low income individuals, will be provided services that meet their unique needs. Please see other sections of the plan for more details on strategies to provide services.

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

The CSCF Board of Directors Chair convenes an annual retreat of the Board to discuss and develop the region's vision and strategic goals. Through small group discussions, information provided by Board staff, and feedback from the organization's stakeholders, the Board aligns the organization's vision and goals to support the needs of the region's career seekers and business. Since aligning its responsibilities and goals articulated with WIOA in 2016, the Board has moved from a compliance focused body, to one that has created a balance between oversight and insight – sharing their industry expertise and inviting other lead partners to share perspective on workforce issues. The Board of Directors, whose majority represents business, continues to work on the three strategic goals it adopted in 2016:

- Raise the profile of CareerSource Central Florida by convening business for education and awareness.
- Create a business-driven system supported by all providers that is intentional, focused and coordinated.
- Plan for ongoing board-level planning discussion to ensure a balance of board member responsibility to oversight and insight, and define what it will mean for the Board to become an innovative thought leader on workforce development

The Board of Directors has taken new action steps to develop metrics to measure progress which is regularly reported by Board staff to the Career Services Committee for workforce services, and the Finance Committee for fiscal benchmarks. Board agendas have been restructured allow time to discuss the Board's strategic goals and the organization's operational activities that align with those goals.

CSCF senior leadership has also worked with outside consultants to help craft its organizational strategies and identify key customer groups by which program services are designed and engaged. As a result of this work, the group has established its core areas

of work, its unique value proposition to the community, and its differentiators compared to other like services. This work, along with the Board's insight and direction, has shaped the vision and goals for our region, and guides our operational strategies.

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

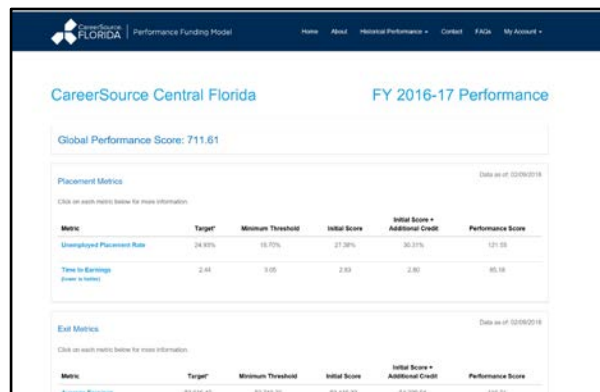
CSCF is focused on meeting the talent needs of business by providing intentional, valuable services that ultimately satisfy both supply and demand. CSCF has re-engineered its operational structure to strategically interface with business and industry, and expand its partnership with economic development, education, small business development centers, and other organizations that serve business and industry throughout the region. By best understanding the needs of business, workforce solutions can then be focused to ensure that career seekers, including the WIOA-focused populations of out of school youth, individuals with disabilities, and those in adult education programs, are entering career pathways that increase earning potential, while ensuring the demand for a skilled workforce for business is met.

New Federal performance measures, effect on July 1, 2016, focus on key indicators that are highly dependent on the economic climate in the local workforce area. The core measures include:

- Percentage of participants in unsubsidized employment during second quarter after exit;
- Percentage of participants in unsubsidized employment during fourth quarter after exit;
- Median earnings of participants during second quarter after exit;
- Percentage of participants who obtain a postsecondary credential or secondary school diploma within 1 year after exit;
- Achievement of measureable skill gains toward credential or employment
- Effectiveness in serving employers (criteria to be developed)

Credential rates and measurable skills gain measures appear focused on talent development activities, but the ultimate measure of successful attainment of skills will be validated by the business seeking skilled talent.

CareerSource Funding Model: CareerSource Central Florida has actively participated in the development of a data-driven, outcome-based Performance Funding Model (<https://pfm.careersource.com>) for the CareerSource Florida network that it will use to inform policy discussions, align resources to shared goals, reward excellence, and showcase improvement through a series of critical metrics. CareerSource Florida has established long-horizon metrics and short-horizon metrics for job placements, employer engagement, cost of doing business, and customer satisfaction. CareerSource Central Florida will continue to participate in the process to support the improved alignment to WIOA federal performance measures.



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

The local levels of performance negotiated with the Department of Economic Opportunity for the period of July 1, 2017 – June 30, 2018 is in alignment with the new benchmarks implemented July 1, 2017 that now require local workforce boards to achieve 90% of the

Measures	DEO / CSCF Negotiated Goals PY 17-18	90% Threshold PY 17-18
Adults:		
Employed 2nd Qtr After Exit	80.10%	72.09%
Employed 4th Qtr After Exit	76.50%	68.85%
Median Wage 2nd Quarter After Exit	\$7,065	\$6,358.50
Dislocated Workers:		
Employed 2nd Qtr After Exit	76%	68.40%
Employed 4th Qtr After Exit	74%	66.60%
Median Wage 2nd Quarter After Exit	\$6,850	\$6,165
Youth:		
Employed / Entered into Education 2nd Qtr After Exit	76%	68.40%
Employed / Entered into Education 4th Qtr After Exit	69%	62.10%
Wagner-Peyser:		
Employed 2nd Qtr After Exit	64%	57.60%
Employed 4th Qtr After Exit	66%	59.40%
Median Wage 2nd Quarter After Exit	\$4,850	\$4,365

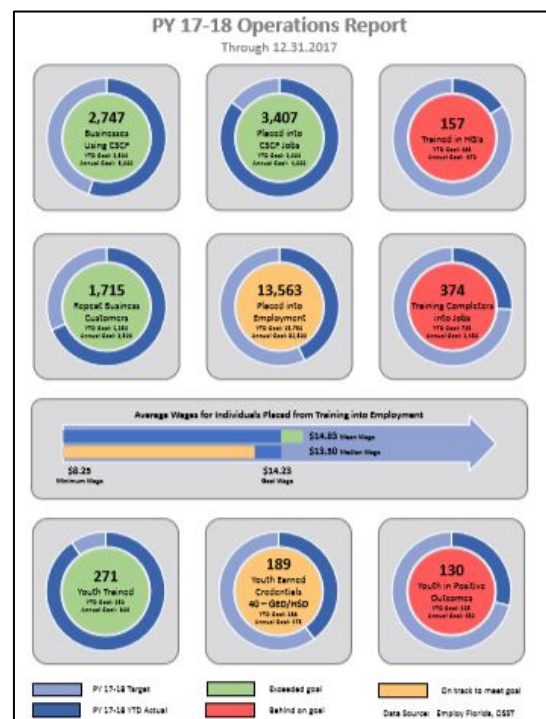
benchmark to have successfully met the defined measure. In program year July 1, 2016 – June 30, 2017, CSCF exceeded seven measures, met one measure, and did not meet three measures – Adult Employed fourth quarter after exit, Median wage second quarter after exit, and Dislocated Worker fourth quarter after exit. A review of second quarter of Program Year 17-18, shows CSCF meeting or exceeding all performance metrics.

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

CSCF serves as the administrative and fiscal agent for local workforce development area. Fiscal audits are conducted semi-annually by the Department of Economic Opportunity; a monitoring firm conducts quarterly reviews; and the Board's Finance Committee regularly reviews budgets and expenditures in detail to ensure fiscal compliance and effective stewardship of federal resources. Annual Audits are conducted by an outside CPA firm, which is procured every five years, in accordance with Federal Regulations in 2 CFR 200. Audit reports assist with measuring the performance and effectiveness of the fiscal processes and policies. All audits performed include testing policies, processes, samples of invoices and payments, and compliance testing of contracted services.

In reviewing the One-Stop delivery system, Operational Leadership utilizes reporting tools that contain data from Employ Florida, the Florida Workforce Integrated Performance Reporting System, and One-Stop System Tracking to monitor:

- program activities;
- case progression;
- training enrollments and completions;
- talent needs through analysis of job orders;
- status of job orders; and
- employment placements.



Additionally, CSCF monitors operational strategy metrics that have been locally identified and outlined in CSCF's Operational Strategic Goals.

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

CareerSource Central Florida has used the income threshold outlined in the United Way ALICE (Asset Limited, Income Constrained Employed) Florida Report (<http://www.uwof.org/alice>) and the U.S. Department of Housing and Urban Development (HUD) to define the local criteria for “self-sufficiency.” In developing the ALICE Project, United Way has partnered with Rutgers University-Newark’s School of Public Affairs and Administration (SPAA), an educational leader in government and non-profit management and governance. The 2017 Report includes findings on households that earn below the ALICE Threshold, a level based on the actual cost of basic household necessities in each county in Florida. Florida has 1.1 million households with income below the Federal Poverty Level (FPL) but also has 2.1 million ALICE households, which have income above the FPL but below the ALICE Threshold. These numbers are staggering: in total, 3.2 million households in Florida are struggling to support themselves. In the CSCF region, there are about 390,00 households that meet the ALICE definition. A survival budget in Orange County for a family of four is \$45,624, while the median income is \$49,635. A survival budget in rural Lake County for a family of four is \$48,023, while the median income is \$41,083.

Based on the 2017 ALICE Report:

- The ALICE population is aging;
- Lower paying jobs are growing faster than higher paying jobs over the next 10 years;
- Technology is changing the workplace and transforming jobs in the skills needed by ALICE workers, job availability, and hours worked;
- The cost of living has increased 19% since 2007, higher than the nation rate of inflation of 14%;
- Increased costs of healthcare and housing has impacted a family’s ability to move from a survival budget to a stability budget;
- The industries that employ ALICE families are Trade, Transportation and Utilities, Government, Education and Health, Professional Business Services, and Leisure and Hospitality;

The U.S. Department of Housing and Urban Development (HUD) defines the median family income for the Orlando-Kissimmee-Sanford Metropolitan Statistical Area (MSA) as \$58,420 (HUD FY 2017 Income Limits, Median Family Income). In order to have a defined threshold to serve business clients and job seeker customers, CSCF is establishing a self-sufficiency threshold of \$58,000, which aligns with HUD and is higher than the local ALICE thresholds. Strategically this will allow CSCF resources to provide training and skills upgrade services to a broader range of individuals while still meeting the intent of WIOA. This local self-sufficiency level represents what it takes to have basic stability in our area with housing, food, clothing, transportation and basic healthcare. See Attachment D.

COORDINATION OF SERVICES

Q 1. Coordination of programs/partners: Describe how individualized career services are coordinated across programs/partners in the one-stop centers, including Vocational Rehabilitation, TANF and Adult Education and Literacy activities. Specify how the local area coordinates with these programs to prevent duplication of activities and improve services to customers (TEGL 3-15).

CareerSource Central Florida has been working collaboratively with the core programs – Adult, Dislocated Worker, Youth, Adult Basic Education, Vocational Rehabilitation, and Wagner Peyser – to effectively serve job seekers and employers, and leverage resources to meet outcomes. The alignment of the core programs includes:

- Collaborating to learn about each core partners' programs, processes, and goals;
- Establishing career pathways aligned to high growth industries, and developing an outreach and awareness campaign to educate career seekers about career options;
- Developing strategies for a common intake and assessment process to streamline access to training;
- Developing a process to quickly engage individuals in job search preparation and connect them to available jobs;
- Combining career guidance, education/training, and support services through, community resources; and
- Preparing individuals for careers that are in demand through training activities.

CSCF has developed Memorandums of Understanding that detail the specific goals to create streamlined referral and assessment processes, strategies to leverage resources and avoid duplication, and opportunities for co-enrollment in adult education courses and occupational skills training. Co-enrollments were piloted over the last two years with Orange County Public Schools and Lake Technical College through an agreement that outlined direct support for young adults in GED preparation programs who are co-enrolled in vocational training, such as plumbing, welding, HVAC, health unit coordinator, and automotive repair. These pilot programs had challenges, and highlighted the issue of participants needing to work and many, after receiving their occupational skills certificates, went to work and did not complete their adult education courses. Lessons learned through these pilots continue to shape how CSCF supports Adult Education and Family Literacy partners and has increased collaborative efforts to find the right solution.

CSCF continues to work to implement the established MOUs to support specific WIOA activities with adult education and family literacy services, vocational rehabilitation, and the division of blind services to increase coordination, address confidentiality issues, identify resource sharing opportunities, and avoid duplication of services. CSCF developed a “Back to Basics” training to help staff understand WIOA’s core programs are how they operate, with updates provided on a quarterly basis. CSCF will continue to coordinate learning opportunities to foster relationships that support co-enrollment and leveraging of services through warm referrals. Fostering these relationships will lead to improved services to customers who are connected to the partner with the specific expertise needed to move forward.

CSCF has also worked diligently with the region’s community action agencies to better understand and coordinate the use of Community Service Block Grant dollars that support work readiness and training activities. CSCF is one of two boards funded to work with a CSBG grantee – Lake County Community Action Agency – to develop coordinated strategies create a process to share data, and increase employment opportunities for targeted populations.

Coordination between workforce programs and Temporary Assistance for Needy Families (TANF) programs is also priority for CSCF. While the TANF program, maintains a high level of administrative responsibilities, there are a variety of opportunities to align training and employment opportunities for program participants to gain the necessary skills to be

competitive in the workplace. CSCF is developing opportunities to engage participants in meaningful, intentional skill building to increase their competitiveness and rapidly connect participants to employment, while meeting participation rates.

Additionally, CSCF will support youth education and training by providing work readiness skill building and work experience opportunities funded with TANF resources. CSCF is actively engaged with local leaders of priority communities who are experiencing high crime and dropout rates among youth, who also have limited access to work opportunities and struggle with significant transportation barriers. A program model with the City of Apopka was launched in 2015 to serve 35 youth in a work readiness and work experience program, 90% of the youth completed the program and 51% were hired by their host employer after the program. Local funds were leveraged by CSCF's TANF resources to fund the program pilot. CSCF expanded its 2017 summer youth employment efforts with its original partner, the City of Apopka, and added seven communities by coordinating local municipal and workforce development dollars. Programming was added to the communities of Sanford, Sumter County, Lake County, and the Orange County neighborhoods of Holden Heights, LIFT, Bithlo, and Oakridge, increasing from 137 summer 2016 participants to 300 participants in 2017.

CSCF will have worked with the Orlando Housing Authority to establish an agreement by June 2018 that outlines how to collaborate to better support and coordinate employment and training activities to meet the needs of those residents in Orlando and Sanford. The Orlando Housing Authority is a Housing and Urban Development (HUD) designated Moving to Work (MTW) program, one of 39 in the nation. Through MTW activities, the Housing staff is able to work with residents who are head of household and increase their earning potential for up to two years. CSCF has worked with the MTW program, however, accessing training services and information sharing can be greatly improved.

The region does not have federal Native American or Second Chance Programs.

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

To support CSCF's focus to increase collaboration with business, an Economic Development Liaison position is shared with the Orlando Economic Partnership, formerly the Metro Orlando EDC. The Liaison position also supports CSCF's Senior Leadership's work with economic development partners, including Lake and Sumter EDCs, to better align workforce investment activities and strategically support the needs of new and expanding businesses. CSCF is actively engaged in several advisory / work teams to align recruitment, hiring, and training services, and future plans include sharing data systems and aligning industry focus areas. Additionally, the Liaison supports CSCF's ability to serve as a convener of other resources provided by other industry partners.

CSCF's Business Team works closely with the local chamber of commerce partners to support connections to qualified talent for business, access to non-workforce resources, labor market information, and extending business networks. CSCF is engaged with the National Entrepreneurship Center in connecting entrepreneurs who need assistance in accessing capital, supporting resources, and growing their business. Small business that are receiving services at the Center are also connected with CSCF staff if they are interested in attracting and developing talent. CSCF actively partners with the Greater Orlando Hispanic Chamber and the African American Chamber that are housed at the Center, to ensure their members can access workforce business services.

In continued efforts to understand the needs of business, CSCF's Board has developed feedback and insight sessions with industry and economic development leaders to continue its learning and collaboration with business. Through regular feedback sessions, forums, and business events, CSCF can gain industry knowledge and help other core partners to support the needs of business by providing valuable talent.

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

CSCF has analyzed its data on training participants over the last two years to better understand the impact CSCF has had in training individuals in its targeted industries, and how it can continue to improve program alignment to develop talent that meets the needs of business, while increasing the number of training completers entering jobs identified by CSCF. In an effort to enhance and improve program alignment to demand occupations, CSCF is further analyzing demand and supply data – from the industry and occupation perspective - to understand talent needs and further validate with industry. In realigning its efforts to targeted industries, CSCF has increased training in the construction, manufacturing, and logistics and distribution industries with its education partners, and has seen increases in wages that positively contribute to the region’s performance benchmarks (See *Industry Analysis Chart*).

Industry Analysis						
Targeted Industry	Employed In General	Employed In Industry	Average Industry Wage	Employed In General	Employed In Industry	Average Industry Wage
	PY 15-16			PY16-17		
Business and Professional	385	127	\$13.20	311	198	\$16.31
Construction	98	75	\$12.64	113	104	\$14.74
Healthcare	339	252	\$15.83	285	228	\$14.30
Hospitality	396	186	\$8.88	140	63	\$10.11
Manufacturing	75	47	\$15.21	78	50	\$15.78
Trade and Logistics	76	53	\$17.38	87	67	\$15.11
Numbers represent unique individuals - not a subset of one another						

CSCF is working with educational partners to coordinate Pell Grant resources to reduce program duplication and connect program completers – those supported by the system and those who are not – to employment opportunities. CSCF has worked with Lake Sumter State College, Lake Technical College, the Technical Education Center of Osceola, Orange County Technical College, and Valencia College to house a CSCF Career Consultant on their respective campuses to deliver services and coordinate resources. By imbedding team members into the education setting, CSCF staff can more effectively document necessary information to document program performance which includes enrollments, program

completers, employment placements, employment placements that are training related, and program costs. Agreements have been executed with each education partner to collaboratively work on these efforts.

CSCF also works with the region's school districts to understand the Career Academies that were created under the Career and Professional Education Act (CAPE), created by the Florida Legislature in 2007, to improve Florida's talent pipeline in critical industries and create relevant curriculum opportunities for middle and high school students to earn industry certifications. Although CSCF has been part of the CAPE curriculum review process, opportunities still remain for increased alignment to employment and additional training post high school.

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

CareerSource Central Florida understands the need to address barriers to increase an individual's chances of accessing and engaging in work activities. Due to inconsistent transportation schedules and limited access in many areas in the region, transportation issues are still a consistent barrier for individuals. CSCF is working to create a better relationship and collaboration with the new Chief Executive Officer at Lynx, which provides transportation in Osceola, Orange and Seminole counties, to continue to advocate for options that support employment.

CareerSource Central Florida currently allocates resources to provide program participants with gas cards and bus passes to travel to work and training opportunities. These supports are limited and may require additional collaboration with other community partners such as county and municipal transportation supports (seniors, veterans, individuals with disabilities, low-income, rural areas). Referrals to other community providers for support services is a consistent strategy utilized by CSCF as it does not have the necessary resources to remove all transportation barriers of our region.

Q 5. Coordination of Wagner-Peyser Services: Describe plans and strategies for, and assurances concerning maximizing coordination of services provided by the state

employment service under the Wagner-Peyser Act (29 U.S.C 49 et seq.) and services provided in the local area through the one-stop delivery system to improve service delivery and avoid duplication of services (WIOA §108(b)(12)).

The Wagner-Peyser program provides labor exchange services to job seekers and employers. Job seeker services include understanding the job market; job readiness and placement assistance, including job referrals; career advising; interest assessments and skills verification; workshops; career exploration via online modules; and other labor exchange services. Employer services include assistance in finding qualified talent via a job posting; talent referrals of qualified job seekers; pre-screening candidates for open positions; and recruitment events. CSCF's designated DEO staff alongside CSCF staff support these functions through the five universally accessible careers centers.

CSCF has restructured the “front of the house” in CSCF’s career centers to better direct customers to the most appropriate program – core or partner – that will address their needs with a high level of customer service. This targeted approach identifies the needs of the career seeker allows Career Consultant staff to move the career seekers quickly to the service(s) that best meets their employment goals. These efforts will avoid duplication of assessment and evaluation by multiple staff or organizations, decrease customer’s wait time to access services, and change the perception of the system from “self-service first” to concierge, tailored services.

Business services has been re-engineered with a more intentional focus to deliver customized solutions, training, and qualified talent to business. This new model addresses the need for broader customized solutions being offered to each businesses’ needs. At times, the customized solution may fall outside of workforce development and will require referrals to other, more targeted community partners. CSCF has also worked to realign its priority to deliver recruitment and hiring services to business, and as a result has seen increased its direct placements over the last three years (*See chart below*).

	WP Staff Assisted	WP Placed	WP Placement %	WIOA Closed	WIOA Placed	WIOA Placement %
PY1415	57952	18342	31.65%	3798	2417	63.64%
PY1516	45426	16316	35.92%	2144	1545	72.06%

PY161 7	35908	13949	38.85%	2187	1933	88.39%
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Business Consultants work cooperatively to assist business in locating top talent for open positions. Services include candidate recruitment, candidate pre-screening, hiring events, and job promotion in various mediums. This strategy continues to be enhanced by aligning processes and staff functions across all programs to support the focus on identifying qualified talent to fill the needs of business.

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

Coordination with Adult Education and Family Literacy efforts are required under Title II of WIOA and CSCF has been working with the region's Adult Education and Family Literacy partners (Lake Technical College, Orange County Public Schools, Seminole State College Foundation, the Adult Learning Center of Osceola, and Sumter Adult Education) who are well-positioned to fill the gaps in academic knowledge needed by individuals who want to transition to careers and secure better paying jobs. Collaborative efforts have been focused on increasing referrals to services, providing financial support to youth and TANF customers, and working with GED graduates to support their efforts to enter employment and/or enroll in post-secondary education or training. CSCF has partnered with the Osceola School District to bring ALCO services to the Osceola Career Center and Lake Technical Center to provide services in the Lake / Sumter Career Center to offer daytime GED classes and expand to English as a Second Language services. Continued work is happening to increase access to adult literacy activities, connect graduates to career pathways, and support increased high school diploma education attainment rates.

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

recipients, to help such recipients become self-sufficient. Additionally, describe the strategies the local area uses to meet CareerSource Florida's goal of reducing welfare.

CSCF is focused on creating more meaningful interactions with TANF customer to increase their opportunities to moving into employment. Through the use of increased technology (MyTESS), CSCF is able to manage cases more effectively and decrease response times to customer. Program efforts are focused on providing workplace skills training, GED remediation and testing supports, enhanced community service and work experience activities, and occupational skills training, TANF customer will increase their ability to compete for employment opportunities within the region. New sessions on becoming employment ready are being provided to customers that focus on soft skills, resume development, communication skills, and workplace expectation prior to engaging in job search activities. CSCF will also partner with education and community partners, including the region's early learning coalitions, to address barriers to employment and reduce dependency on the public system.

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

Establishing cooperative agreements was a priority for CSCF in 2016-2017. Agreements have been established with Vocational Rehabilitation, Division of Blind Services, Adult Education and Family Literacy providers, the Migrant Seasonal Farmworker program in Orange County, Community Services Block Grant agencies, Senior Community Employment Services, Career and Technical Education. CSCF will also work to complete its agreement with the Orlando Housing Authority to outlie shared resources, facilities / office space, service coordination, referral processes, and information sharing protocols.

In 2017-2018, CSCF's priority is to ensure there is documented service coordination and referral processes that can be quantified and evaluated. The partners are interested in what

services are delivered by each core and mandatory partner, what are the gaps in service, how best to leverage each organization's expertise, and how best to compliment service strategies. Partner forums will be scheduled quarterly to collectively work on the areas of interest and to ensure all partners are in compliance with funding requirements. Cross-training, information sessions, data sharing efforts, and shared employment outreach efforts will be shared during Partner Forums. As the state further defines the roles of each core partner statewide, cooperative agreements will incorporate those items into a locally developed Memorandums of Understanding or Collaboration agreements with local partners.

DESCRIPTION OF THE LOCAL ONE-STOP SYSTEM

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

- A. Describe how required WIOA partners contribute to your planning and implementation efforts. If any required partner is not involved, explain the reason.**
- B. Identify any non-required partners included in the local one-stop delivery system.**
- C. The LWDB, with the agreement of the chief elected official, shall develop and enter a memorandum of understanding between the local board and the one-stop partners. Please provide a copy of sector executed MOUs (WIOA §108(b)(6)(D)).**

CSCF continues to work toward the development of One-Stop delivery system that is demand-driven, intentional, and coordinated.

- Demand-driven: services are provided to connect the “right” talent to the needs of business and training options are available to prepare those individuals requiring skills building or upgrade to enter a targeted industry.
- Intentional: services are tailored based on the needs of the business or individual customer, and delivered in a way that creates a relationship with each customer and moves the customer through needed services to employment.
- Coordinated: services are coordinated with core and community partners to develop holistic, effective solutions that meet and exceed the expectation of our customers and partners.

All required (core and mandatory) partners are either engaged in our career centers, serve

on CSCF's Board of Directors or Board committees, participate in strategic focus groups, or are accessible via their website. CSCF's One Stop Operator is regularly working with required partners to facilitate discussions about how best to coordinate services and plan strategies. Agreements have been developed with required partners, but further work is needed to meet the requirement of the incorporating an infrastructure cost agreement. As part of developing the system, MOUs between the local workforce board and the one-stop partners will have the support of the chief elected officials and the Board.

CSCF does not currently have any non-required partners included in the one-stop delivery system, however moving forward there may be an opportunity to share facilities and resources with other organizations who share in CSCF's mission.

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

- A. Describe how entities within the one-stop delivery system, including one-stop operators and one-stop partners comply with the Americans with Disabilities Act regarding physical and programmatic accessibility of facilities, programs and services, technology and materials for individuals with disabilities, including providing staff training and support for addressing needs of individuals with disabilities. Describe how the LWDB incorporates feedback received during consultations with local Independent Living Centers on compliance with Section 188 of WIOA (WIOA §108(b)(6)(C)).**
- B. Describe how entities within the one-stop delivery system use principles of universal design in their operation.**
- C. Describe how the LWDB facilitates access to services provided through the local delivery system, including remote areas, using technology and other means (WIOA §108(b)(6)(B)).**

All career service centers meet the standards set by the Americans with Disabilities Act. All facilities are accessible and technology is available to assist those individuals who have a physical, visual, or hearing impairment. CSCF ensures all locations meet Title III of the ADA that requires public accommodations to provide good and services with disability on an equal basis with the rest of the public. CSCF utilizes the ADA Checklist for Readily Achievable

Barrier Removal created by Adaptive Environments Center, Inc. and Barrier Free Environments, Inc. The checklist is also used to ensure all eligible training providers meet the standards necessary to allow participants to access training. Staff training is provided on all resources available to individuals with disabilities, including those resources provided through the Ticket to Work program, Vocational Rehabilitation, Division of Blind Services, community organization such as Lighthouse for the Blind and the Center of Independent Living. CSCF expects to continue to provide training opportunities for staff as part of its WIOA implementation strategies, including its Pathways to Prosperity grant funded by CareerSource Florida to offer call center training for visually impaired individuals in partnership with Lighthouse for the Blind.

The region's career service center facilities are equipped to serve individuals with disabilities. Specifically:

- The signs for parking spaces at the one-stop career centers are mounted at appropriate heights and contained requisite language.
- The accessible restrooms at all one-stop career centers contain extended grab bars, pipe covers, placards for identification, and full-length mirrors.
- All doorways are clear of obstruction and meet the width requirements.
- All signs are at the appropriate height and have raised characters.
- All workstations are accessible and accommodate wheelchairs if necessary.

As centers are upgraded, CSCF will maintain set ups consistent with the principles of universal design.

The LWDAs one-stop career centers each contain accessible workstations with software appropriate to assist customers with disabilities. All computers in resource areas use Zoom Text 10 by AI Squared to assist visual impaired persons appropriately utilize computer-based programs and services such as Employ Florida and Metrix Learning suite. CSCF will partner with the Division of Blind Services to further explore other software that may assist career seekers in adapting to the workplace.

Q 3. Integration of Services: Describe how one-stop career centers implemented and transitioned to an integrated, technology-enabled intake and case management

information system for programs carried out under WIOA and programs carried out by one-stop career center partners (WIOA §108(b)(21)).

CSCF will use Employ Florida Marketplace (EFM), the One Stop Tracking System (OSST), the Florida Workforce Integrated Performance Reporting System (FWIPRS), to collect and manage participant activities and data. CSCF continues to research all features available in EFM to support operational strategies, and as such is piloting the new VOS Greeter functionality in the system, and the integrated use of Salesforce. A new call center to support call volume received by the organization can now assist callers with information about services, accessing training, SNAP and TANF status and appointments, and efficient connections to consultant staff. CSCF continues to seek technology solutions for all of the organization's efforts to increase efficiency and improve cycle time in processes. Regular, consistent training on the state managed systems, along with revised data collection protocols, will be implemented to increase staff's effectiveness in using these tools.

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

As part of the new law, local workforce boards are required as part of its duties to define the role of the One Stop Operator and determine how to competitively procure the entity or entities (§678.600 -678.635). CSCF worked to move forward on this work to establish a One Stop Operator by July 1, 2017.

In December 2016, the Board of Directors adopted a definition of a Career Services Provider and a One Stop Operator.

The Career Services Provider is defined as: The local workforce development board, through its President & CEO, will deliver actions and strategies outlined in the WDB's four-year plan for the local area, inclusive of required career service programs, in partnership with the chief elected official(s) consistent with WIOA requirements. The LWDB will be responsible for oversight of programs to ensure state and federal requirements are met.

The One Stop Operator is defined as: An entity or entities that will strategically coordinate all mandatory partners across five counties represented by Career Source Central Florida as required by WIOA, and whose responsibilities will not include service delivery and

overseen by the Chief Operations Officer. The One Stop Operator will work with CSCF to meet all state and federal requirements.

Based on these definitions, an RFP was issued in February 2017, with a bidder's conference held the same month. In March 2017, proposals were reviewed and a recommendation for selection was presented to the Board's Career Services Committee. The Committee presented its recommendation to the full Board in May 2017 and approved. Staff began contract negotiations and had the provider in place for July 1, 2017. The One Stop Operator will continue to facilitate strategy development with core and mandatory partners focused on the region's full service center.

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

CSCF has developed a key executive position who is responsible for analyzing customer demographics, labor market information, economic trends, demographic composition of its five counties, and education levels to continually understand our customer base and the needs of our region. Workforce intelligence will allow CSCF to intentionally create strategic partnerships that align with the talent development strategies needed to create the competitive talent.

DESCRIPTION OF PROGRAM SERVICES

Q 1. System description: Describe the local workforce development system. Identify programs included in the system and how the local board works with each entity to carry out core programs and other workforce development programs supporting alignment in provision of services. Identify programs of study authorized under the Carl D. Perkins Career and Technical Education Act of 2006 (20 U.S.C. 2301 et seq.), that support the strategy identified in the Florida Unified Plan under WIOA section 102(b)(1)(E) (WIOA §108(b)(2)).

Under WIOA, workforce boards are encouraged to convene partners to develop a demand driven, intentional, and coordinated system that supports the development of our region's talent pipeline. To continue to develop this system, coordination of core and partner programs is essential. CSCF's programs include:

- Workforce Investment and Opportunity Act programs: Adult, Dislocated Worker, Youth;

- Wagner-Peyser programs: Reemployment Services and Eligibility Assessment (RESEA) Grant, Trade Act Assistance (TAA), Veteran's Programs, Labor Exchange.
- Temporary Assistance for Needy Families
- Supplemental Assistance & Nutrition Program
- Adult education and Family Literacy Act programs
- Vocational Rehabilitation
- Division of Blind Services
- Community Service Block Grants
- Migrant Seasonal Farmworkers Program (MSFW)
- Senior Community Employment Program
- Career and Technical Education Program (Perkins)

CSCF seeks to better coordinate current WIOA, Wagner-Peyser, and TANF activities to reduce duplication and improve performance, while planning for the incorporation of Adult Education, Vocational Rehabilitation, and Community Service Block Grant (CSBG) funded activities. Programs of study authorized under the Perkins Career and Technical Education Act are currently reviewed and validated by CSCF for inclusion on the Eligible Training Provider List (ETPL). CSCF will be working with Perkins programs and other career programs to align continued training and employment activities for program completers.

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

It is CSCF's policy to competitively procure all goods and services (See Attachment E). The extent of competition will be consistent with the dollar amount, but in general, procurements will be conducted in an open manner, available to the public for response and all procurement decisions will be documented. In general, except for small purchases, all procurements will be publicly advertised and a minimum of three responses will be required in order to make a purchase. If fewer than three responses are received, and there is sufficient time before the good or service is needed, CSCF will attempt to obtain additional responses. After a public solicitation, if only one bid is received, it will be evaluated under the rules governing sole

source purchases and a cost analysis.

ETHICAL CONSIDERATIONS IN PROCUREMENT: CareerSource Central Florida has adopted a code of conduct related to the conduct of procurements, which is contained in CareerSource Central Florida's Contracting Policies and Procedures. CareerSource Central Florida Board of Directors and staff must comply with state and federal rules and regulations governing the conflict of interest and appearance of conflict of interest in the procurement process.

- a) Regardless of the type of procurement, if CareerSource Central Florida desires to enter into a contract with an organization or individual represented on the Board of Directors, the contract must be approved by a two-thirds vote of the Board members present, a quorum having been established, and the Board member who could benefit financially from the transaction must declare a conflict and abstain from voting on the contract. Board members must disclose any such conflicts in accordance with the requirements of the Florida law and complete appropriate conflict-of-interest forms.
- b) Board members and the CEO/President will complete financial disclosure forms required by the state of public officers on an annual basis
- c) The following are prohibited in connection with any solicitation:
 - i. Acceptance or payment of gratuities, kickbacks;
 - ii. Providing confidential procurement information not made available to the general public;
 - iii. Improper communications between CareerSource Central Florida and any proposer (or its agents or representatives);
 - iv. Collusion or noncompetitive pricing practices between proposers.

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

Establishing and designing a robust career pathway process for all sectors is needed to better educate career seekers and stakeholders about how to move into high-growth occupations, and the need for continual learning, including the need to acquire ongoing industry-recognized credentials. By partnering with education, CSCF has increased its understanding of career pathways offered by career and technical education programs, certificate programs, and degree programs, and how to better advise career seekers on available options. CSCF consultants will continue to intentionally work with career seekers to identifying career choices that offer competitive wage progression and opportunities for advancement.

CSCF regularly reviews its training matrix, and analyzes completion and placement rates to ensure training programs are meeting the needs of industry partners, and career seekers are obtaining the skills needed to be competitive. Upon review, if a training need is identified to respond to an emerging business need, CSCF will work with education and business partners to develop customized training options. CSCF will also work with adult education and vocational rehabilitation partners to inform the system on needed talent development and how it may align with partner mandates under WIOA.

CSCF recognizes the need to cultivate significant community collaborations to address the need for additional supports for eligible individuals. CSCF has identified a network of community providers who have the resources available to address transportation, housing, mental health and substance abuse, and legal issues. Many of CSCF's communities have significant resources to assist with these issues, however, in the region's most rural areas, addressing these issues may be challenging and will require CSCF to advocate and encourage collaborative discussion to find solutions to support employment and training efforts.

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

CSCF has redesigned its training opportunities, including support of individual training accounts (ITA), based on historical data of participant success, labor market information validated by industry, and industry research. More than 90% of CSCF's ITA financial resources are invested in targeted industries; however, as the Board of Directors through its Career Services Committee continues to review industry trends and program performance, it

may consider supporting targeted occupations in key industries to further narrow its focus and investment. The Career Services Committee is an active committee that has focused its work over the last two years (2016-2018) on developing and measuring key outcomes, and offering strategies to improve service delivery. The evaluation of these programs has determined that some sectors have limited training aligned to their talent needs, such as construction; while other sectors have an overabundance of training options, such as healthcare. The analysis of participant data over a two-year period also revealed that certificate programs appear to have higher completion rates than degree programs, but wage for certificate programs were less than those of degree programs. As part of its evaluation, the Career Services Committee adopted a new policy in 2017 (Attachment F) to better align training initiatives and ITAs to CSCF's targeted industries, and leverage the flexibility of WIOA to develop innovative training solutions

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

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

(A) CSCF continually reviews industry and sector activity through a variety of resources available, including:

- Department of Economic Opportunity Bureau of Labor Statistics;
- UCF Institute for Economic Competitiveness;

- ESMI data tool;
- U.S. and Florida chambers of commerce;
- Federal Reserve – workforce development; and
- Industry focused publications.

(B) CSCF has intentionally sought key industry partnership to inform the development of sector strategies and goals. As part of CSCF's work with CareerSource Florida, CSCF focused its efforts to learn about sector strategy development and how best to move its work from responding to sector needs, to sitting with industry in identifying specific needs and how to best provide talent development activities that met the identified needs. **(C)** Through its learning, CSCF is working on sector strategy grant activities in the areas of construction and hospitality, two industries that continue to grow in our region. CSCF is building on its initial work with the Associated Builders and Contractors, Inc. Central Florida Chapter, to continue to identify apprenticeships and industry-led training opportunities that support the industry in filling construction jobs that continue to grow in the region. In working with hospitality, CSCF is facilitating discussions on how to support career ladders that lead to mid-career opportunities, and specialized positions that often do not have a specific training program offered by education. CSCF plans to collaborate with its post-secondary partners who have existing industry advisory boards to continue to validate industry needs.

(D, E) CSCF has worked with the industries it originally identified in its plan, and has been able to track and analyze its results over the last two years. With a focus on industry-focused strategies, CSCF increased talent development activities for construction, manufacturing, and trade & logistics; while maintaining its efforts to support healthcare and business and finance related occupations. Through this analysis, CSCF found that it was not providing strong talent development activities to hospitality, but rather providing job matching support and missing opportunities to engage in supporting occupations in need. With this new learning, CSCF leadership is engaging with the industry to further understand its needs and develop industry-led solutions. **(F)** CSCF has developed a dashboard that includes investment into targeted industries, talent development outcomes, and individuals entering employment in those sectors. To continue to improve and sustain sector strategies, CSCF expects to:

- Conduct quarterly learning conversations with industry groups;
- Reposition its service efforts to identify industry subject matter experts within the organization that engage industry leaders to identify needs and articulate strategies for talent development;

- Develop industry-led information sessions for career seekers to understand opportunities to enter and grow in an industry; and
- Validate data projections with industry leaders.

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

On an annual basis, the Board reviews industry data to review opportunities for talent development activities that will allow an individual career seeker to gain meaningful skills and compete for a job in the industries identified. All training options are designed or selected based on the industries of focus and are tracked for investment and outcomes.

Q 7. Employer Engagement: Describe strategies and services used in the local area to:

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

The Board has a key priority – being business focused in all efforts – closely aligning with the new expectation under WIOA. CSCF’s business engagement plan, created with the assistance of Full Capacity Marketing Inc., has helped to focus the organization’s efforts on growing and retaining businesses, and offering services that are more specialized than was previously offered. Based on this work the following strategies have been implemented and further developed:

- Business Consultants in each county who reach out to local businesses on a regular basis to share CSCF information with them, as well as gather information on business’ hiring and/or training needs.
- Consultants use a consultative approach to build relationships and understand the needs of the business, thus providing solutions and not focusing on transactional activities.
- Increased ongoing relationships with community business support organizations, chambers, nonprofit business support organizations and economic development agencies to develop referrals of businesses that need our assistance.
- Business Consultants with industry-specific knowledge and experience are aligned to those industries to create intentional relationships.

- Business Consultants attend industry-related trade shows and events where they can engage with specific industry partners to share labor market information, talent development efforts, and understand hiring needs.

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

- Developed a strategy to actively connect qualified candidates with the positions the companies require;
- Established a more consultative approach with employers to better identify their individual needs and align CSCF services as solutions if appropriate;
- Gather ongoing information from businesses about the types of positions they need, what skill gaps they are seeing in job candidates, and how to address those gaps in CSCF's talent development efforts; and
- Continuously evaluate and improve processes to increase the speed and efficiency of our service delivery, and offer a greater value to the businesses we serve.

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

CSCF has a dedicated Economic Development Liaison who maintains an ongoing relationship with the Orlando Economic Partnerships and the local EDC's by acting as the main point of contact for support in their work. The Liaison coordinates with the local economic development staff to:

- Provide relevant job market data, information about CSCF services, and how CSCF programs may assist businesses with hiring and/or training;
- Follow-up with the EDC on talent recruitment opportunities for referral companies;
- Share information about EDC initiatives with other businesses and internal CSCF teams;
- Partner with EDC staff to make business retention calls; and
- Collaborate with site selection efforts to provide labor market information and regional talent development strategies.

Moving forward, CSCF will be working with the Orlando Economic Partnership to increase its efforts to share data on industry and workforce trends, and work to understand and potentially align strategic priorities.

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

CSCF will work to engage the business to provide services to affected employees if a business experiences a reduction in labor force. The services offered – job search assistance, resume writing, job referral, connection with training, and access/information on unemployment compensation – will be coordinated by the Business Manager, and involve staff who can identify like open positions to move those affected to employment quickly. For those individuals who have experienced job loss due to skills gap issues, training and/or certification support will be offered.

For individuals receiving unemployment insurance support, CSCF has created a process to ensure updated resumes and skills inventories are completed to assist in targeted placement support from a Career Consultants. Team members will work with those individuals to best market their skills and experience, connect them to hiring opportunities, and prepare for interviews to quickly re-enter employment. As the business team is developing hiring opportunities, they will intentionally look to identify employers who are interested in talent with the skills available.

Q8. Priority for Services: Describe local policies and procedures are established to prioritize recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient for individualized career and training services in the adult program.

CSCF's Priority for Services Policy aligns with WIOA's intent to be flexible on how services are delivered (*See Attachment D*). The policy meets the guidance outlined by the Department of Labor Employment and Training Administration and is in compliance with WIOA §680.600, §680.640. CSCF's priority of funds is established for adults ages 17-72 with veterans, veteran's spouses, recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient. Basic skills deficient criteria is established as an individual that is unable to compute or solve problems, or read, write, or speak English, at a

level necessary to function on the job, in the individual's family, or in society. The established priority will be used in the provision of individualized career and training services regardless of funding levels.

Priority for Adult eligibility must be provided in the following order:

1. Veterans and eligible spouses who are WIOA eligible and who also have one or more of the barriers listed in the chart below.
2. Individuals who are not veterans or eligible spouses, but who have any one or more of the barriers listed in the chart below.
3. Veterans and their eligible spouses who do not have any of the barriers listed below:
 - i. Military spouses who have lost employment as a direct result of a relocation to accommodate a permanent change in duty station of the spouse.
 - ii. Military spouses who are a dependent spouse of a member of the Armed Forces on active duty whose family income is significantly reduced as determined by the State or CSCF because of a deployment, a call or order to active duty, a permanent change of station, or the service-connected death or disability of the service member.
 - iii. Military spouses who are unemployed or underemployed and are experiencing difficulty in obtaining or upgrading employment.
4. Individuals who are not veterans and do not have any of the barriers listed below.

Adult Barriers used to Determine Priority of Service (in alphabetical order):

- Disabled individuals, as defined in WIOA section 3, paragraph 25
- Displaced homemakers, as defined in WIOA section 3, paragraph 16
- English language learners, as defined in WIOA section 204
- Ex-offender, as defined in WIOA section 3, paragraph 38
- Homeless individuals, as defined in section 41403(6) of the Violence Against Women Act of 1994 (42 U.S.C) 14043e-2(6)
- Indians, Alaska Natives and Native Hawaiians as defined in WIOA section 166
- Individuals who have a low level of literacy, as defined in WIOA section 203
- Individuals facing substantial cultural barriers, as defined in WIOA section 203
- Individuals within two years of exhausting the lifetime eligibility for TANF assistance part A of Title IV of the Social Security Act (42 U.S.C. 601 et6 seq.)
- Long-term unemployed individuals, defined as individuals who have not been employed

within the last 27 weeks.

- Low-income individuals as defined in WIOA section 3 paragraph 36 and locally as:
 - a. An individual receiving, or who in the past six months, has received federal, state or local public assistance;
 - b. An individual with a family income that does not exceed the federal poverty level;
 - c. An individual with a family income that does not exceed 200% of the lower living standard income level;
 - d. An individual who is homeless as defined above;
 - e. A disabled individual whose own income meets the definition of low income regardless of family income.
- Low-income also includes individuals who are underemployed as defined below:
 - a. Individuals working part-time who are seeking full-time employment;
 - b. Employed individuals in a position that is inadequate with respect to their skills and training;
 - c. Individuals who are employed, but whose current earnings are 20% lower than their previous employment.
- Older individuals, aged 55 or older as defined in WIOA section 3 paragraph (39)
- Migrant and/or seasonal farmworkers as defined in WIOA section 167 (1)
- Single parents
- Single pregnant women

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

CSCF plans to offer a variety training options via contract or training vendor agreements to provide traditional classroom training, short-term training, and work-based learning to support career seekers in gaining competitive, industry-specific skills. CSCF will develop criteria to evaluate training programs that are considered short-term training (less than six months) for saturation rates. A ratio will be established of training completers and open jobs, and once the threshold is met, referrals to those programs will be suspended to those occupational areas as not to flood the market. CSCF will identify credential options to assist career seekers in entering or growing in a career path. As career seekers gain skills, career consultants will

support transition to additional career exploration, internship, on-the-job training, or employment placement options as needed.

CSCF will provide work-based learning activities as part of its training options. Work-based learning options will include internship/work experience, on-the-job training, customized training, individual training supports, pre-vocational training, and apprenticeship. These services will be delivered based on the assets and needs identified in the individual's service plan. Specialized services may be crafted for individuals with significant barriers and/or limited work history.

Training services may also be delivered in partnership with community organization whose work supports specific populations such as those individuals with disabilities, are English language learners, or are homeless. CSCF is engaged with its adult education and vocational rehabilitation programs to understand best practices in those systems in providing training activities and how each core partner can better support its efforts. An example of this is the collaboration with the Lighthouse for the Blind to increase access to its successful call center training program.

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

CSCF posts its ITA programs available for customers on the organization's website. Information displayed include program name, provider, locations, program fees and performance. Performance reflects program completion rates and placement rates of all students enrolled in the program (as reported to Florida Education and Training Placement Information Program - FETPIP) and performance of WIOA participants. The information will be sortable and allow the participant to view program/course descriptions. Customers will work with a Career Consultant during the selection process to analyze cost and how to coordinate financial resources, but the consultant will not influence an individual's decision. Staff will support a customer in making an informed decision, including how to pay for training through WIOA supports, Pell Grant resources, or personal investment.

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

- A. Describe any ITA limitations established by the board;**
- B. Describe any exceptions to the use of ITAs.**

CSCF's Individual Training Account process encourages customers to review all program information to make an informed choice about the training options available. Career Consultants work with individuals to understand their interests, skills, aptitude, and occupational expectations (credentials, licensure, work culture) as part of the evaluation process prior to selecting a program.

(A) Currently, ITA vouchers are capped at \$5,000 for occupation training in a high-growth industry. The maximum investment for direct customer costs includes the actual cost of tuition, books and training fees. The maximum amount does not include supportive services required for participation in training.

(B) Training programs are limited to two years in duration; therefore, ITA funding will generally not pay for a full bachelor's, master's or doctorate degree. Under CSCF's current policy for those currently enrolled in a bachelor's degree program (only those approved programs on the TOL), CSCF will pay for the last 30 credit hours of training. Funding for education and training beyond the baccalaureate level is limited to licensure/exam fees for targeted occupation list disciplines.

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

As our region's economy improves and industry projections for 2025 indicate that 12% of our region's workforce will be self-employed and engaged in the "gig" economy (Department of Economic Opportunity, Bureau of Labor Statistics, December 2017), CSCF is interested in exploring more opportunities for entrepreneurial training, and learning more through the National Entrepreneurship Center and its post-secondary partners. CSCF will continue to develop relationships with a variety of community business support organizations, such as the Small Business Development Center, the Hispanic Business Initiative Fund, the African American Chamber, the University of Central Florida Incubator, and others to explore promising practices to develop entrepreneurs.

Q 13. Enhancing Apprenticeships: Describe how the LWDB enhances the use of apprenticeships to support the local economy. Describe how the LWDB works with industry representatives and local businesses to develop registered apprenticeships, in collaboration with apprenticeship training representatives from the Florida DEO and other partners, including educational partners. Describe how job seekers are made aware of apprenticeship opportunities (TEGL 3-15).

Apprenticeships are a rather new service to our system, and CSCF continues to explore the various training models offered within the region. CSCF currently has three apprenticeship programs to its training matrix. Through its Career Services Committee, CSCF plans to add additional apprenticeship programs over the next two years, including a new innovate apprenticeship with The Hartford Insurance Company, Seminole State College and CSCF to increase benefit analyst professionals in the region. CSCF expects to launch that apprenticeship model in 2018. CSCF is also exploring various opportunities to engage underrepresented customer groups in apprenticeship activities moving into 2020.

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

CSCF is engaged in a number of special projects that involve industry-specific strategies and opportunities to align career pathways. The Operations Manager provides oversight and performance management activities for these special projects that include on-the-job training, and understanding career pathways.

U.S. Department of Labor Trade Adjustment Community College and Community Training (TAACCT): CSCF is a sub-recipient to Valencia in its efforts to offer training and industry credentials in the advanced manufacturing industry by providing skills necessary to re-employ displaced workers into the industry, and supporting the upskilling of employed workers. CSCF has partnered with Valencia in two separate initiatives under TAACCT grants.

Training for Manufactured Construction Consortium (TRAMCON): CSCF has partnered with Seminole State College to support the coordination and activities as part of the U.S. Department of Labor's TAACCT grant programs. CSCF will co-locate with Seminole State College staff to support business outreach activities, employment preparation, and placement of program completers as part of its construction technologies training.

Sector Partnership National Emergency (NEG) Grant: CSCF is one of 10 LWDBs to partner with CareerSource Florida and DEO on a nearly \$7 million Sector Partnership NEG to build sector strategies in manufacturing and healthcare. The NEG resources will allow CSCF to provide ITAs, internship, and OJT opportunities to individuals who lack the experience to enter the manufacturing or healthcare industry. In healthcare, NEG resources will be used to provide a variety of training opportunities that may include employed worker training or customized career path initiatives. All grant strategies will include intensive services and training to program participants so they may obtain industry-recognized credentials and ultimately employment.

Pathways to Prosperity: This grant provides for call center training to 40 WIOA Adult and Dislocated Worker eligible participants with visual impairments. Grant participants will be case managed by the Ticket-to-Work staff in each office. This will allow the customer to be case managed in both programs (TTW and this grant) simultaneously. The established training program, offered through Lighthouse of Central Florida, is 140 hours and lasts four weeks. CSCF will work with Lighthouse, the Division of Blind Services, and Vocational Rehabilitation, to identify candidates and coordinate job placement activities.

Sector Strategies: This grant provides training for 100 WIOA Adult and Dislocated Worker eligible participants in the construction, and hospitality and tourism industries (50 participants in each). Both industries are experiencing tremendous growth and have talent supply challenges that, in some instances, may affect their ability to sustain growth or keep up with demand.

America's Promise: Partnering with CareerSource Brevard, this grant provides training and employment opportunities in the IT industry for up to 200 individuals over four years. The participant target groups are women, African-American, Hispanic, and low-income individuals.

YouthBuild: This grant provides education, leadership, mentoring, counseling, and hands-on work experience to unemployed young adults between ages 16 and 24. A key target group is high school drop outs who are in need of a high school diploma and interested in the construction industry. Under this grant, CSCF partners with Valencia College to serve 62 youth.

Q15. Service Provider Continuous Improvement: Describe the local board's efforts to ensure the continuous improvement of eligible providers of services, including contracted services providers and providers on the eligible training provider list, so they meet the needs of local employers, workers and job-seekers (WIOA §108(b)(6)(A)).

CareerSource Central Florida has a contracted, external party that reviews all CSCF and service provider-operated programs for compliance and quality. Service Provider contracts are reviewed quarterly– at a minimum – while CSCF-operated programs are reviewed monthly. A sample is identified monthly and includes cases and activities at various stages of implementation.

CSCF's Operations Manager, Youth Director, and Senior Career Service managers meet with their respective service providers monthly to review program goals and operational milestones. Through these monthly meetings, reinforcement of policies and procedures and recommendations for improvement are reviewed and discussed. Desk reviews are also conducted by the Operations Manager and Program Advisors to ensure funds are expended according to the negotiated budget and are in compliance with OMB.

Eligible training provider performance is reviewed annually by the Board to ensure training resources are utilized to increase the skills of individuals in targeted industries. The Board's Career Services Committee reviews training provider completion rates, placement rates, and average wages for those who complete programs. As indicated previously in the plan, the Board has established a policy on how it will determine the eligibility of training providers consistent with the state's policy to establish a statewide list approved by the Governor.

Q16. Youth Program Design: Describe the design framework for local youth programs and how the 14 program elements required in §681.460 of the WIOA regulations are made available within that framework (WIOA §129(c)(1)).

- A. Define the term “a youth who is unable to compute or solve problems, or read, write, or speak English at a level necessary to function on the job, in the individual’s family, or in society.” Describe how the local board defines whether a youth is unable to demonstrate these skills sufficiently to function on the job, in their family, or in society and what assessment instruments are used to make this determination (20 C.F.R. §681.290).**
- B. Define “requires additional assistance.” Describe how the local board defines the term “requires additional assistance” used in determining eligibility for WIOA-funded youth programs (20 CFR §681.300).**

The design framework of the youth programs provided by CSCF includes:

- An objective assessment of each youth participant, including a review of the academic and occupational skill levels and service needs, for the purposes of identifying appropriate services and career pathways for participants and informing the individual service strategy. A new assessment of a participant is not required if the assessment has been completed within the previous six months, including assessments conducted as part of another education or training program.
- An individual service strategy developed for each youth participant that:
 - is directly linked to one or more indicators of performance (skills gain, credentials);
 - identifies appropriate career pathways that include education and employment goals;
 - considers career planning and the results of the objective assessment; and
 - prescribes achievement objectives and services for the participant;
- Case management and career coaching of youth participants, including follow-up services.

CareerSource Central Florida will ensure that the following 14 services outlined in WIOA are available to youth participants through collaboration and/or procured services:

- Tutoring, study skills training, instruction, and evidence-based drop-out prevention and recovery strategies;
- Alternative secondary school services, or dropout recovery services, as appropriate;
- Paid and unpaid work experiences;
- Pre-apprenticeship programs;
- Internships and job shadowing;
- On-the-job opportunities;
- Occupational skills training programs that lead to a credential (industry-recognized);
- Leadership development;
- Comprehensive guidance and counseling;
- Financial literacy;
- Entrepreneurial skills training
- Supportive services;
- Adult mentoring; and

- Follow-up services.

All of the activities provided in the program are designed to prepare youth to transition to post-secondary education or training, employment, military, or apprenticeship.

Youth Program Policy Definitions

CSCF has chosen to define “a youth who is unable to compute or solve problems, or read, write or speak English at a level necessary to function on the job, in the individual’s family, or in society” as follows: A youth who meets one of the below criteria:

- Reading, math, or language comprehension at or below the 8th grade level as indicated on the Test for Adult Basic Education (TABE) assessment tool.
- Is unable to compute or solve math problems to include word problems at or below the 8th grade level as indicated on the TABE assessment.
- Is unable to complete a basic computer literacy assessment through an online assessment.
- Is unable to communicate in English via everyday conversation/interaction. If the youth is unable to interact socially or professionally with staff, they are unlikely to successfully communicate to the standards expected in the workplace.

These barriers will be documented through an attestation completed by the staff member and approved by the Youth Program Manager or designee.

CSCF defines “Requires Additional Assistance” (Attachment G) as an individual who requires “additional assistance” to complete an educational program, or to secure and hold employment, if one of the following conditions exist:

- Personal/family substance abuse
- Gang involved/affiliated/affected
- Youth who has received a district certificate of completion
- Youth in an alternative school placement
- A school history of being over age for their grade
- High crime rate areas
- Lack of affordable housing
- Youth who are, or a family member considered to be, a Migrant Seasonal Farmworker
- Youth that have one or more parents incarcerated, institutionalized, or sentenced by

the courts to incarceration / institutionalization for more than one year.

- Youth who are unemployed and lack a significant or positive work history.
- Individual or member of a family that recently exhausted TANF or UI benefits
- An emancipated youth as defined by the court
- Lesbian, gay, bisexual, transgendered, questioning (LGBTQ) youth

Documentation of why the youth requires additional assistance is required at enrollment.

PUBLIC COMMENT PROCESS

Describe the process used, in accordance with the criteria below, to provide opportunities for public comment and input into the two-year modification of the local plan.

- (1) Make copies of the proposed local plan available to the public through electronic and other means, such as public hearings and local news media (WIOA §108(d)(1)).**
- (2) Provide a 30-day period for comment on the plan before its submission to CareerSource Florida, Inc., beginning on the date on which the proposed plan is made available, prior to its submission to the Governor (WIOA §108(d)(2)).**

Copies of the plan have been made available through CSCF's website and via email upon specific request. 2) Public comment on the plan opened February 29, 2018 and ended March 29, 2018 via CSCF's website – www.careersourcecf.com. Additionally, CSCF will keep the public comment period open to receive comments until the plan modification is approved.

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

An email address (CSCFStrategy@careersourcecf.com) was established to collect and review public comment. Input and comment by business was obtained through a number of focus groups with representative of targeted industries. Industry representatives shared ideas on how to engage with CSCF through these discussions and helped to impact the Board's strategic goals. Information from the Metro Orlando EDC (growth industries/demographics), the

University of Central Florida (industry growth), and the United Way (ALICE report) provided input to the plan.

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

A Partners Forum was held on March 1, 2018 to solicit input and ideas from CSCF's core and mandatory partners. Suggestions on strategies and efforts to collaborate are included in this plan modification. Partners were also invited to review the document and provide comment.

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

No comments had been received as of the submittal date of March 29, 2018.

ATTACHMENT A

ATTACHMENT B

ATTACHMENT C

ATTACHMENT D

ATTACHMENT E

ATTACHMENT F

ATTACHMENT G

ATTACHMENT A

DRAFT

APPROVED
BY ORANGE COUNTY BOARD
OF COUNTY COMMISSIONERS

JAN 05 2016 *SLK/LC*

**CENTRAL FLORIDA AREA WORKFORCE DEVELOPMENT CONSORTIUM
INTERLOCAL AGREEMENT**

This INTERLOCAL AGREEMENT is made and entered into by and between LAKE COUNTY, a political subdivision of the State of Florida, ORANGE COUNTY, a charter county and political subdivision of the State of Florida, OSCEOLA COUNTY, a political subdivision of the State of Florida, SEMINOLE COUNTY, a political subdivision of the State of Florida, SUMTER COUNTY, a political subdivision of the State of Florida, and the Central Florida Regional Workforce Development Board, Inc., d/b/a CareerSource Central Florida, a not-for-profit corporation established in the State of Florida, hereinafter referred to as "CSCF" for the purposes of establishing the CENTRAL FLORIDA AREA WORKFORCE DEVELOPMENT CONSORTIUM, hereinafter referred to as the "CONSORTIUM", and establishing the roles and responsibilities of the CONSORTIUM and CSCF.

WHEREAS, the Congress of the United States of America has enacted and the President has executed the WORKFORCE INNOVATION AND OPPORTUNITY ACT (Public Law 113-128) (hereinafter referred to as the "ACT") which authorizes the establishment of local areas to, coordinate and align key employment, education, training, adult literacy, and vocational rehabilitation programs in the United States; and

WHEREAS, the ACT supersedes the Workforce Investment Act of 1998 and amends other related laws; and

WHEREAS, the State of FLORIDA enacted the Workforce Innovation Act of 2000 and reaffirmed its intent in 2011 by establishing Chapter 445 of the Florida Statutes to re-designate regional workforce boards and require the development of procedures to increase accountability among workforce system partners; and

WHEREAS, CSCF has operated successfully as the administrative entity and fiscal agent for all programs and services promulgated under the Act and Florida's Workforce Innovation Act of 2000; and

STATE OF FLORIDA, COUNTY OF ORANGE
I HEREBY CERTIFY this is a copy of a document
approved by the BCC on **JAN 05 2016**
MARTHA D. HAYNIE, COUNTY COMPTROLLER
By *Lalala Muftic* **JAN 07 2016**
Deputy Clerk Clerk Seal



WHEREAS, the State of FLORIDA, pursuant to the ACT, has mandated the re-certification of local workforce development areas and local workforce development boards; and

WHEREAS, the Governor has re-designated the five county area, described herein, to be designated a local workforce development area under the ACT and Florida's Workforce Innovation Act of 2000.

NOW THEREFORE, we, the participating counties, do hereby agree to and accept the designation of the area comprised of the five counties as a local workforce development area under the ACT and do hereby establish the CONSORTIUM in accordance with the provisions set forth herein.

I. CONSORTIUM MEMBERS.

- A. The CONSORTIUM shall be comprised of either the Mayor/Chairman or a currently serving County Commissioner designated by the Mayor/Chairman.
- B. The CONSORTIUM shall elect from among its five (5) members, one member to act as Chairman of the CONSORTIUM and one member to act as the Vice Chairman.
- C. The Chairman of the CONSORTIUM shall act as the chief elected official for the local workforce development area.
- D. The CONSORTIUM designates CSCF as the local workforce development board ("CSCF Board").
- E. The CONSORTIUM shall appoint the membership of the CSCF Board in accordance with the ACT, Florida's Workforce Innovation Act of 2000, Section 445.007, Florida Statutes, other applicable regulations, and the corporate bylaws of CSCF, which are attached hereto and incorporated by reference as a material part of this INTERLOCAL AGREEMENT as **Attachment "A."** Unless otherwise precluded by law, the CONSORTIUM may remove any member of CSCF Board at any time by majority vote of the CONSORTIUM. Such removal by the CONSORTIUM may be with or without cause.
- F. The CONSORTIUM, having been designated the local grant recipient pursuant to section 106(b)(1) of the ACT, hereby designates CSCF as the administrative entity

and fiscal agent for all programs promulgated under the ACT and Florida's Workforce Innovation Act of 2000.

- G. The CONSORTIUM shall meet from time to time as it may deem necessary, but no less than semi-annually, to conduct such business as may be necessary. One of the two (2) required meetings shall include the CSCF Board. All meetings of the Consortium shall be open to the public and notice shall be provided in accordance with the State Sunshine Law requirements, as set forth in Section 286.011, Florida Statutes.
- H. The CONSORTIUM shall approve the budget of CSCF Board each year during one of the required meetings which shall be processed by the CSCF Board in accordance with requirements set forth in Section 445.007, Florida Statutes.

II. LOCAL WORKFORCE DEVELOPMENT BOARD

- A. CSCF shall ensure that the composition of the local workforce development board shall at all times comply with requirements of the federal ACT (sec. 107(b)(2)(A)), the Florida Workforce Innovation Act, and Section 445.007, Florida Statutes and shall include:
 - 1. Representatives of the private sector, who shall constitute, at a minimum, a majority of the total active membership and who shall be appointed proportionately to the relative population of the five (5) counties, except that all counties shall have at least two (2) members. Members of the private sector shall be appointed by CONSORTIUM members of their respective Counties. Said appointments shall be announced by the appointing member at a duly called CONSORTIUM meeting. The appointment of private sector members shall not be subject to approval or removal by the remainder of the members of the CONSORTIUM.
 - 2. Representatives of other organizations as required by applicable State and federal law.
- B. All appointments to the CSCF Board shall be for a period of three (3) years, with one-third of the appointments being made annually, pursuant to the bylaws of CSCF. Re-appointment for an additional three-year term shall be automatic so long as the

duly appointed board member is in good standing, the seat on the Board continues to exist, and the Board member wishes to serve another term.

- C. All vacancies will be appointed in the same manner as the original appointments.
- D. A member of the CONSORTIUM may be present at each meeting as a liaison to the CSCF Board but shall have no voting powers and shall not be considered a member of the CSCF Board.

III. ADMINISTRATION REQUIREMENTS AND OBLIGATIONS OF CSCF

A. Pursuant to section 107(d) of the ACT and Section 445.0007, Florida Statutes, CSCF shall:

1. Develop and submit the local plan to the Governor of Florida (section 118.107(d)(1) of the ACT).
2. Designate one-stop operators and providers (section 121 of the ACT).
3. Ensure the appropriate use, management, and investment of associated funds received to maximize performance outcomes (section 116 of the ACT).
4. Designate eligible providers of youth services, (section 123 of the ACT).
5. Develop an annual budget for the purpose of carrying out the duties of CSCF including, but not limited to, all programs promulgated under the ACT for the region.
6. Provide for the conduct of an annual audit of all funds managed by CSCF and submit a copy of that audit and copies of financial statements prepared for the conduct of CSCF business to the CONSORTIUM.
7. Provide oversight for the one-stop delivery system, local employment and training activities, and youth activities conducted pursuant to the ACT.
8. Provide such staff and other support to the CONSORTIUM, as deemed necessary by the CONSORTIUM, for the conduct of CONSORTIUM business.
9. Submit to the CONSORTIUM, for review and approval, the local plan, the one-stop operator designation, and the annual budget. If the Budget is not approved by the CONSORTIUM, CSCF shall submit an amended budget until a budget is approved. This provision shall be included in the CSCF corporate

documents.

10. Provide an annual report to the CONSORTIUM.
11. Coordinate the activities of the workforce development system with economic development strategies and other business and employer activities as may be appropriate and allowable.
12. Promote generally the participation of the private sector in all aspects of the conduct of CSCF business and services provided.

B. CSCF shall furnish a Commercial Crime Fidelity Bond for Employee Dishonesty on blanket basis with a maximum limit of One Million Dollars (\$1,000,000). The bond shall be endorsed to cover "Third Party" liability including a third-party beneficiary clause in favor of each of the participating counties. The bond shall include a minimum twelve (12) month discovery period when written on a loss sustained basis.

C. Notwithstanding any provisions of the law to the contrary, none of the parties hereto shall be liable for any claims, damages, injuries, losses, or expenses arising out of or resulting from any act, omission, or negligence of any other party, their officers, employees, or agents. Nothing in this INTERLOCAL AGREEMENT shall be construed as waiving the sovereign immunity afforded to the participating counties under Section 768.28, Florida Statutes.

IV. GENERAL CONDITIONS

- A. This INTERLOCAL AGREEMENT contains all the terms and conditions agreed upon by the parties hereto, and shall supersede all previous agreements, either oral or written, by or between two or more of the parties hereto with respect to the subject matter hereof. No other agreements, oral or written, regarding the subject matter of this INTERLOCAL AGREEMENT shall be deemed to exist.
- B. This INTERLOCAL AGREEMENT may be amended or modified upon the written request of any party hereto. Such written request shall be distributed to all parties at least thirty days prior to requested actions effective date. Any alterations, amendments, modifications or waivers in the terms and conditions of this

INTERLOCAL AGREEMENT shall not be effective unless reduced to writing, approved by all parties, signed by duly authorized representatives and filed with each participating county's Clerk of the Court or Clerk of the Board, as may be applicable.

- C. The term of this INTERLOCAL AGREEMENT shall be from date of filing with the respective Clerks of the Court and Clerk of the Board after execution of all participating Counties, and shall remain in effect until May 3, 2022, unless otherwise modified in accordance with section C. above.
- D. In the event of any changes in State or federal law wherein this INTERLOCAL AGREEMENT shall no longer be valid, this INTERLOCAL AGREEMENT shall be automatically deemed void.

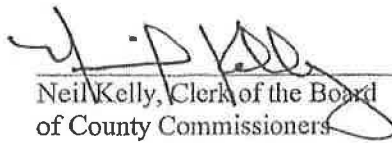
IN WITNESS WHEREOF, the parties hereto have executed this INTERLOCAL AGREEMENT, by and through their duly authorized representatives, on the respective dates shown below.

[Signatures to follow on next page]

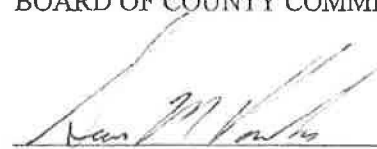
COUNTY

LAKE COUNTY, through its
BOARD OF COUNTY COMMISSIONERS

ATTEST:



Neil Kelly, Clerk of the Board
of County Commissioners
of Lake County, Florida



Sean M. Parks
Chairman

This 6th day of Jan, 2016.

Approved as to form and legality:

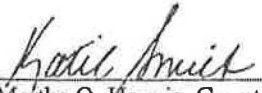



Melanie Marsh
County Attorney

COUNTY

ORANGE COUNTY, through its
BOARD OF COUNTY COMMISSIONERS

ATTEST:


Martha O. Haynie, County Comptroller
As Clerk of the Board of County
Commissioners
of Orange County, Florida


Teresa Jacobs
Orange County Mayor

This 5th day of January, 2016.

Approved as to form and legality:

County Attorney



COUNTY

OSCEOLA COUNTY, through its
BOARD OF COUNTY COMMISSIONERS

ATTEST:

Debra A. Dennis
Secretary, Clerk of the
Board of County Commissioners
of Osceola County, Florida
BCC approved 12/07/15

William J. J. J.
Chairman

This 7th day of December, 2015.

Approved as to form and legality:

A

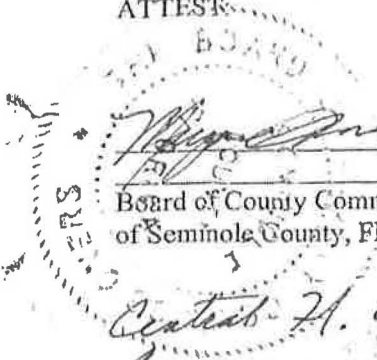
County Attorney



COUNTY

SEMINOLE COUNTY, through its
BOARD OF COUNTY COMMISSIONERS

ATTEST


_____, Clerk of the
Board of County Commissioners
of Seminole County, Florida



John Horan, Chairman

This 10th day of December, 2015.

*Central Fl. Area Workforce Dev.
Consortium Interlocal Agreement*


Approved as to form and legality:



County Attorney



ATTEST:


Connie Webb, Deputy Clerk of the
Board of County Commissioners
of Sumter County, Florida

COUNTY

SUMTER COUNTY, through its
BOARD OF COUNTY COMMISSIONERS



Garry Breeden
Chairman

This 24th day of November, 2015.

Approved as to form and legality:



George Angeliadis
County Attorney

ATTEST:

Pamela Nabors

CENTRAL FLORIDA REGIONAL
WORKFORCE DEVELOPMENT
BOARD, INC.

Eric Jackson
Eric Jackson, Chairman

This 28 day of January, 2016.

ATTACHMENT A
CAREERSOURCE CENTRAL FLORIDA
BYLAWS

AMENDED and RESTATED BYLAWS
of
**CENTRAL FLORIDA REGIONAL
WORKFORCE DEVELOPMENT BOARD, INC.
d/b/a CAREERSOURCE CENTRAL FLORIDA
*a not-for-profit Florida Corporation***

ARTICLE I

NAME

This Corporation will be known as CareerSource Central Florida.

ARTICLE II

DEFINITIONS

- A. **Articles:** means the Articles of Incorporation of the Corporation including any amendments or restatements.
- B. **Corporation:** means Central Florida Regional Workforce Development Board, Inc. doing business as CareerSource Central Florida.
- C. **Board of Directors** or **Board:** means the Board of Directors of the Corporation.
- D. **Region:** means the five Florida counties served by the Corporation: Lake, Orange, Osceola, Seminole and Sumter.
- E. **Director:** means an individual member of the Board of Directors.

ARTICLE III

PURPOSE

CareerSource Central Florida is dedicated to putting Central Florida residents to work, and finding and developing talent to help Central Florida businesses stay competitive.

ARTICLE IV
POWERS OF THE CORPORATION

1. General Powers. Except as limited by the Articles or these Bylaws, the Corporation will have and exercise all rights and powers in furtherance of its purpose now or hereafter conferred on not-for-profit corporations under the laws of the state of Florida.

2. Workforce Powers. The Corporation will have and exercise all rights and powers granted to regional workforce boards under the laws of the state of Florida and workforce investment boards under Public Law No. 105-220, Title I, Section 117(b), Unites States Code, and all other applicable federal and state workforce laws, regulations and directives.

ARTICLE V
RESPONSIBILITIES AND AUTHORITIES OF THE BOARD OF DIRECTORS

1. General. All corporate powers will be exercised by or under the authority of the Board of Directors, and the business and affairs of the Corporation will be managed under the Board's direction.

2. Functions. The Directors' general functions will be to:

- a. establish policies and guidelines for the operation of the Corporation;
- b. exercise and fulfill the specific powers and responsibilities of the Board, as specified in the Articles and these Bylaws and as required under applicable law; and
- c. discharge their duties in good faith, with the care an ordinary prudent person in a like position would exercise under similar circumstances, and each Director will act in a manner he or she reasonably believes to be in the best interests of the Corporation.

3. Powers and Responsibilities of Directors. Without limiting the generality of the functions in section 2 of this Article, the Directors' specific powers and responsibilities will be to:

- a. adopt, amend, repeal or alter the Articles and these Bylaws;
- b. elect and remove the officers of the Corporation;
- c. ensure accountable management of real and personal property and the general business of the Corporation, including authorization and approval of material contracts and agreements on behalf of the

Corporation, all in accordance with applicable law, the Articles and these Bylaws;

- d. establish policies, including monetary or other limits, within which the administration and staff of the Corporation may function independently, including any sale, lease, purchase or other transfer or disposition of any real or personal property of the Corporation, and how exceptions or over-limit transactions are handled;
- e. approve general rules and regulations for the administration of the Corporation and its personnel, and approve any substantial change in employee benefits of the Corporation;
- f. designate the person or persons authorized to make and sign bills, notes, checks, contracts, or other documents that are binding on the Corporation;
- g. establish and develop additional committees necessary or appropriate to fulfill the responsibilities of the Corporation's mission and purposes;
- h. approve the establishment, scope of activity and bylaws of any auxiliary organizations, advisory boards, development councils and other such related organizations;
- i. delegate authority to the President/CEO of the Corporation;
- j. develop and approve business plans;
- k. approve any affiliation by the Corporation with one or more entities in any partnership, joint venture or joint enterprise;
- l. authorize any change in the character or business purpose of the operations of the Corporation; and
- o. approve any merger or consolidation of the Corporation with any other organization or entity.

ARTICLE VI

MEMBERSHIP OF THE BOARD OF DIRECTORS

1. Appointment. Members of the Board of Directors will be appointed by the Region's chief elected officials in accordance with applicable local intergovernmental agreements and in compliance with criteria established by the state of Florida and the federal government, and will be composed of at least the following:

- a. representatives of the private sector, who must constitute a minimum of fifty-one percent (51%) of the Board, and who will be representatives of private, for-profit businesses and be chief executives, chief operating officers or other executives who have substantial management or policy responsibility; and

- b. such other representatives as may be required or permitted by applicable federal or state law, regulations or directives.

2. Term. Unless otherwise indicated under the terms of a Director's appointment, the term of each Director's appointment will be three (3) years, beginning the first day of July of the year of appointment, and continuing through the last day of June in the year three (3) years hence, except that a Director may serve until December of the last year of the term, or until action regarding that Director's seat is taken, whichever occurs first. Subject to applicable law, one third (1/3) of all terms will expire annually. Directors will be eligible for re-appointment without re-nomination for an additional term having a maximum of three (3) years.

3. Qualifications. Directors must be citizens or permanent residents of the United States of America, duly appointed pursuant to Section 1 of this Article, and will, at all times, comply with the requirements established by the state of Florida, the federal government and any applicable intergovernmental agreement.

4. Vacancies. Vacancies during the term of a Director's appointment will be filled in an appropriate timeframe upon receipt of sufficient nominations for the vacancy. The person appointed to fill the vacancy will serve the remaining term of the prior Director and may be re-appointed as provided in Section 2 of this Article.

ARTICLE VII OFFICERS AND THEIR DUTIES

1. Election of Officers. All officers will serve 1 year terms. The Chairman can serve for 2 consecutive terms. At the conclusion of the Chairman's term, he or she will serve as immediate Past Chair on the Executive Committee. In addition, the Board of Directors will have the power to:

- a. appoint such other officers it deems necessary or appropriate;
- b. fill any vacancy in any office occurring for any reason whatsoever, by election, by majority vote of a quorum; and
- c. employ a President/CEO who will (i) be responsible and accountable to the Board, (ii) act on the Board's behalf in the conduct of its directives, and (iii) be responsible for employment, oversight and management of all other staff and employees of the Corporation.

2. Removal of Directors and Officers. Any Director or officer may be removed by a vote of two thirds (2/3) of the Board at a properly noticed meeting whenever, in the judgment of the Board, the best interests of the Corporation will be served. Failure to attend (in person or by teleconference) at least seventy-five percent (75%) of the

regularly scheduled Board meetings or regularly scheduled committee meetings of which a Director is a member without approval by the Chairman of the Board may result in the immediate removal of any Director or officer.

3. Delegation. For any reason it deems appropriate, the Board may delegate any power or duty to any Director or officer, including to the President/CEO or his or her staff designee, but no Director or officer will execute, acknowledge or verify any document or instrument in more than one capacity.

4. Compensation. No compensation will be paid to the Directors for the services performed by them for the Corporation as Directors. Directors may be reimbursed for expenses incurred when traveling on official business of the Corporation if approved by the Chairman of the Board. Such reimbursement must conform to the Corporation's established travel policy.

5. Duties of the Chairman. The Chairman will:

- a. preside at all meetings of the Board and determine the agenda for all Board meetings in consultation with the President/CEO;
- b. make all committee appointments other than the officers elected under Section 1 of this Article;
- c. be a member ex-officio of all committees with the exception of the Executive Committee, for which the Chairman may opt to serve either as committee chairman or as a regular committee member; and
- d. perform all other duties assigned to the Chairman under these Bylaws and those usually pertaining to the office of Chairman.

6. Duties of the Vice Chairman: The Vice Chairman will:

- a. preside at all meetings of the Board in the absence of the Chairman;
- b. be a member of the Executive Committee;
- c. assist the Chairman, when requested, in the performance of the Chairman's duties; and
- d. perform all such other duties usually pertaining to the office of Vice Chairman, including acting as the Chairman during the absence or disability of the Chairman.

7. Duties of the Treasurer. The Treasurer will:

- a. oversee the custody of all funds and securities of the Corporation and the collection of interest thereon;
- b. oversee the accounts of the Corporation and report thereon at each regular meeting of the Board of Directors;
- c. make a report at each meeting of the Board of Directors and special reports when requested;

- d. oversee the preparation and filing of reports and returns required by all governmental agencies; and
- e. serve as Chairman of the Finance Committee.

8. Duties of the Secretary. The Secretary will:

- a. ensure that minutes of each meeting are recorded;
- b. be responsible for advising the Board of omissions and corrections to the minutes;
- c. ensure that copies of the minutes are timely transmitted to all members of the Board of Directors;
- d. ensure that all meetings are noticed as required by statute, these Bylaws or regulations;
- e. ensure that attendance is recorded at meetings;
- f. ensure that committee reports are maintained;
- g. ensure that the record books of the Corporation are maintained; and
- h. perform such other duties as may be delegated by the Board of Directors.

9. President and Chief Executive Officer. The President and Chief Executive Officer ("**President**") will be nominated by the Executive Committee and confirmed by the Board of Directors. The President will be a full-time employee of the Corporation and not a member of the Board of Directors. The President will be reviewed annually by the Executive Committee and the President's salary and bonuses will be set by the Executive Committee. The President may only be terminated upon the recommendation of a majority of the members of the Executive Committee and a majority vote of the Board of Directors. The President will be the chief executive officer of the Corporation and will be responsible for the general and active management of the business and affairs of the Corporation, subject to the direction of the Executive Committee and the Board of Directors.

10. Chief Operating Officer. The Chief Operating Officer ("**COO**") will be hired by the President with the advice of Executive Committee. The COO will not be a member of the Board of Directors, but will be an officer and full-time employee of the Corporation. The COO will direct, administer and coordinate the day-to-day activities of the Corporation consistent with the directions, policies, goals and objectives established by the President and the Board of Directors and as set forth in the job description for this position.

11. Chief Financial Officer. The Chief Financial Officer ("**CFO**") will be hired by the President with the advice of the Chairman. The CFO will not be a member of the Board of Directors, but will be an officer and full-time employee of the Corporation. The CFO will direct the Corporation's financial operations and accounting practices

consistent with the directions, policies, goals and objectives established by the COO, President, and the Board of Directors and as set forth in the job description for this position approved by the Executive Committee.

ARTICLE VIII

BOARD COMMITTEES

1. Committees. The Board will create standing committees as follows: Executive, Finance, Audit, Career Services, Governance, , and Community Engagement. In addition, the Chairman of the Board of Directors will have the authority to establish such other standing or ad hoc committees deemed necessary or desirable to the conduct of the Corporation's business. The Chairman of the Board will make appointments to all committees and will appoint the chairman of each committee. Any committee may include members appointed by the Chairman of the Board who are voting members of the committee but not members of the Board of Directors. Any item voted on by a committee (other than approval of meeting minutes and meeting adjournments) will be reported to the Executive Committee at its next meeting.

2. Executive Committee. The Executive Committee will have a minimum of five (5) members, consisting of the officers elected under Article VII, Section 1, and the chairs of the standing committees. The Chairman will endeavor to ensure that each of the five (5) counties in the Region is represented on the Executive Committee. The Executive Committee will have and exercise the full authority of the Board of Directors in the management of the Corporation's business between meetings of the Board of Directors. The Chairman of the Board may choose to serve as chairman of the Executive Committee or may choose to appoint another member of the Executive Committee to serve in such capacity. In the event that the Chairman of the Board chooses not to serve as Chairman of the Executive Committee, he or she will serve as a voting member of the Executive Committee. After completion of the Chairman term, he or she will serve on Executive Committee for 1 year as Immediate Past Chairman. Except as otherwise set forth in these Bylaws, the Executive Committee will serve as the personnel committee with the delegated authority to take final action on all appropriate executive personnel matters.

3. Finance Committee. The Finance Committee will be chaired by the Treasurer and will consist of those Directors recommended by the Treasurer and appointed by the Chairman of the Board of Directors. The Finance Committee will be responsible for assisting the Treasurer in the conduct of his or her responsibilities as set forth in Article VII, Section 7; reviewing periodic reports on the financial activities of the Corporation;

controlling and supervising the financial affairs of the Corporation; overseeing the Corporation's retirement plan; and approving budgets and budget amendments.

4. Audit Committee. The Audit Committee will be chaired by a Director appointed by the Chairman of the Board of Directors and will consist of members appointed by the Chairman of the Board. The Audit Committee will be responsible for:

- a. overseeing the annual audit(s) of the Corporation's programs required under applicable laws, regulations or directives (including OMB Circular A-133), including selection of the auditor and approval of annual audit plans;
- b. providing oversight of the Corporation through review of monitoring reports and audits of the Corporation;
- c. making recommendations to the Board of Directors on the selection of an independent auditor and regarding such auditor's compensation and terms of engagement;
- d. receiving and reviewing the annual audit reports from the independent auditor;
- e. reviewing and approving the Corporation's responses to any adverse findings regarding the financial affairs of the Corporation, including, but not limited to, adverse monitoring reports, financial audits, management decision letters, Office of Inspector General's investigative reports and final determination letters;
- f. reviewing, in consultation with the independent auditor and management, the Corporation's financial statements;
- g. reviewing and evaluating the adequacy of internal accounting controls and practices and making recommendations for revisions and additions as necessary or appropriate; and
- h. reviewing and evaluating the Corporation's ethics and conflict-of-interest policies and procedures and, whenever the Chairman of the Board or the committee deems appropriate, investigating any alleged violations of such policies and procedures.

5. Career Services Committee. The Career Services Committee will be chaired by a Director appointed by the Chairman of the Board of Directors and will consist of members appointed by the Chairman of the Board. The Career Services Committee will oversee the Corporation's operations plan as part of the Workforce Innovation and Opportunity Act ("WIOA") and all other program activities that support job seekers and businesses in the Region.

6. Governance Committee. The Governance Committee will be chaired by a Director appointed by the Chairman of the Board of Directors and will consist of

members appointed by the Chairman of the Board. The Governance Committee will be responsible for reviewing the Corporation's Articles and By-laws and recommending changes to the Board of Directors; identifying a process to recruit board members and officers; and evaluating the Board's effectiveness.

7. 8. Community Engagement Committee. The Community Engagement Committee will be chaired by a Director appointed by the Chairman of the Board of Directors and will consist of members appointed by the Chairman of the Board representing expertise in outreach marketing and media relations. The Community Engagement Committee will recommend strategies and policies to ensure the Corporation is, through appropriate outreach, aligned and engaged with other community, civic and economic-development activities.

ARTICLE IX

CONDUCT OF BUSINESS

1. Annual Meeting. The Annual Meeting of the Board of Directors of this Corporation will be held in the month of June.

2. Regular Meetings. At a minimum, regular meetings of the Board of Directors will be held quarterly, in the months of September, December, April and June.

3. Special Meetings. Special meetings of the Board of Directors may be held at the call of the Chairman or by written request of ten (10) or more members of the Board of Directors.

4. Notice. Reasonable notice in writing of each meeting, whether annual, regular, special or emergency, will be provided to each member of the Board of Directors of the Corporation at his or her contact place on file with the Secretary. Such notice may be by e-mail or other reliable means of electronic transmission. The Corporation's meetings will be publicly announced in accordance with Section 286.011, Florida Statutes.

5. Order of Business. Business will be conducted to the extent feasible in accordance with Roberts' Rules of Order, as newly revised.

6. Quorum. A quorum for all Board meetings will require that at least fifty percent (50%) of the Board members be present. If there is less than a quorum at any meetings, a majority of those present may adjourn the meeting. A quorum for all committee meetings will be the same as the quorum for Board meetings and require that at least fifty percent (50%) of the Board members who are committee members be present.

7. Voting. Directors may not be represented at any meeting by an alternate, nor may proxies be given. Each Director will have one (1) vote upon every issue properly submitted to vote at any meeting of the Corporation, except that no Director may cast a vote on any matter on which he or she has or appears to have a conflict of interest, as defined by federal or state law or under the Corporation's policies then in effect. Any Director who has such a conflict of interest must declare the same and refrain from discussion at the meeting and voting on the issue.

8. Majority Rule. All matters before the Board will be determined by a majority vote of Directors present at the meeting with a quorum present, with the exception of the following, either of which must be approved by a vote of two-thirds (2/3) of the Board's total membership:

- a. amendments to these Bylaws (as provided under Section 13 below); and
- b. any contract or agreement between the Corporation and a Director, a relative (as defined in s. 112.3143[1][b], Florida Statutes) of a Director, or any contract or agreement that would be a conflict for any such Director as defined by federal or state law or under the Corporation's policies then in effect.

9. Meetings by Telephone or Teleconference. Members of the Board of Directors or any committee may participate in a meeting by means of telephone conference or similar communication method by which all persons participating in the meeting can hear each other at the same time. Any such participation will constitute presence in person at the meeting.

10. Business Affairs; External Audit. Subject to applicable law, the Board of Directors may solicit, borrow, accept, receive, invest and expend funds from any public or private source. The award of procurement contracts with vendors and the award of subrecipient contracts will be in accordance with applicable federal and state law and regulations. The Corporation's accounts and records will be audited annually by a firm of certified public accountants at the expense of the Corporation; and a copy will be available on request for each Director to review.

11. Investments. Any investments of funds of the Corporation must first be approved by the Finance Committee and recommended to the Board of Directors for its approval.

12. Fiscal Year. The fiscal year of the Corporation will be July 1 to June 30.

13. Amendments to Bylaws. Amendments to these Bylaws of the Corporation may be proposed by any member of the Board of Directors. The Board of Directors, by a two thirds (2/3) vote of the its membership, may amend, revise, add to, repeal or rescind these Bylaws or adopt the new bylaws at any meeting of the Board of Directors,

provided that written notice of any amendment, revision, addition, repeal or rescission of these Bylaws or adoption of new bylaws must be published and given to the Directors at least thirty (30) days preceding the date of the meeting of the Board of Directors at which such action is to be considered.

14. Conflicts with Laws. The Corporation will abide by all applicable federal and state laws and regulations, which will supersede any provision of these Bylaws in conflict with any such law or regulation.

15. Books and Records. The Corporation will keep correct and complete books and records of account and financial statements and will also keep minutes of the proceedings of the Board of Directors and all committees. Such books and records will be available to all Directors on request and to members of the general public in accordance with applicable law.

16. Indemnity. Subject to applicable law, any current or former member of the Board of Directors or officer who is made a party to or called as a witness with respect to any threatened or pending legal proceeding will be indemnified by the Corporation against all costs and expenses (including attorneys' fees, judgments, fines and amounts paid in settlement) reasonably incurred by him or her in connection with such proceeding, including any appeal thereof, if he or she acted in good faith and in a manner he or she reasonably believed to be in or not opposed to the best interests of the Corporation and, with respect to any criminal action or proceeding, had no reasonable cause to believe his or her conduct was unlawful. The termination of any proceeding by judgment, order, settlement, conviction or upon a plea of nolo contendere or its equivalent, will not create a presumption that the person did not act in good faith and in a manner which he or she reasonably believed to be in or not opposed to the best interests of the Corporation, and, with respect to any criminal action or proceeding, did not have reasonable cause to believe that his or her conduct was unlawful. The Board of Directors will determine, by a majority vote of a quorum consisting of Directors who are not parties or witnesses to the proceeding, whether indemnification is appropriate as provided in this section. If this section or any portion of it is invalidated on any ground by a court of competent jurisdiction, the Corporation will nevertheless indemnify each director and officer of the Corporation to the fullest extent permitted by portions of this section not invalidated and to the fullest extent permitted by law.

17. D&O Insurance. The Corporation will purchase and maintain in full force and effect a policy or policies of directors and officers insurance covering its Directors and officer with minimum coverage of \$1 million, unless the Executive Committee, in consultation with the Treasurer, finds that such insurance is no longer available on commercially reasonable terms or that the premiums for such will be unreasonably high. In addition, the Corporation may purchase and maintain insurance on any person

who is or was a Director, officer, employee, or agent of the corporation against any liability asserted against such person and incurred by him or her in any such capacity or arising out of his or her status as such, whether or not the Corporation would have the power to indemnify the person against such liability under the provisions of Section 16 of this Article. .

ATTACHMENT B

DRAFT

AMENDED and RESTATED BYLAWS
of
**CENTRAL FLORIDA REGIONAL
WORKFORCE DEVELOPMENT BOARD, INC.
d/b/a CAREERSOURCE CENTRAL FLORIDA**
a not-for-profit Florida Corporation

ARTICLE I

NAME

This Corporation will be known as CareerSource Central Florida.

ARTICLE II

DEFINITIONS

- A. **Articles:** means the Articles of Incorporation of the Corporation including any amendments or restatements.
- B. **Corporation:** means Central Florida Regional Workforce Development Board, Inc. doing business as CareerSource Central Florida.
- C. **Board of Directors** or **Board:** means the Board of Directors of the Corporation.
- D. **Region:** means the five Florida counties served by the Corporation: Lake, Orange, Osceola, Seminole and Sumter.
- E. **Director:** means an individual member of the Board of Directors.

ARTICLE III

PURPOSE

CareerSource Central Florida is dedicated to putting Central Florida residents to work, and finding and developing talent to help Central Florida businesses stay competitive.

ARTICLE IV
POWERS OF THE CORPORATION

1. General Powers. Except as limited by the Articles or these Bylaws, the Corporation will have and exercise all rights and powers in furtherance of its purpose now or hereafter conferred on not-for-profit corporations under the laws of the state of Florida.

2. Workforce Powers. The Corporation will have and exercise all rights and powers granted to regional workforce boards under the laws of the state of Florida and workforce investment boards under Public Law No. 105-220, Title I, Section 117(b), Unites States Code, and all other applicable federal and state workforce laws, regulations and directives.

ARTICLE V
RESPONSIBILITIES AND AUTHORITIES OF THE BOARD OF DIRECTORS

1. General. All corporate powers will be exercised by or under the authority of the Board of Directors, and the business and affairs of the Corporation will be managed under the Board's direction.

2. Functions. The Directors' general functions will be to:

- a. establish policies and guidelines for the operation of the Corporation;
- b. exercise and fulfill the specific powers and responsibilities of the Board, as specified in the Articles and these Bylaws and as required under applicable law; and
- c. discharge their duties in good faith, with the care an ordinary prudent person in a like position would exercise under similar circumstances, and each Director will act in a manner he or she reasonably believes to be in the best interests of the Corporation.

3. Powers and Responsibilities of Directors. Without limiting the generality of the functions in section 2 of this Article, the Directors' specific powers and responsibilities will be to:

- a. adopt, amend, repeal or alter the Articles and these Bylaws;
- b. elect and remove the officers of the Corporation;
- c. ensure accountable management of real and personal property and the general business of the Corporation, including authorization and approval of material contracts and agreements on behalf of the

Corporation, all in accordance with applicable law, the Articles and these Bylaws;

- d. establish policies, including monetary or other limits, within which the administration and staff of the Corporation may function independently, including any sale, lease, purchase or other transfer or disposition of any real or personal property of the Corporation, and how exceptions or over-limit transactions are handled;
- e. approve general rules and regulations for the administration of the Corporation and its personnel, and approve any substantial change in employee benefits of the Corporation;
- f. designate the person or persons authorized to make and sign bills, notes, checks, contracts, or other documents that are binding on the Corporation;
- g. establish and develop additional committees necessary or appropriate to fulfill the responsibilities of the Corporation's mission and purposes;
- h. approve the establishment, scope of activity and bylaws of any auxiliary organizations, advisory boards, development councils and other such related organizations;
- i. delegate authority to the President/CEO of the Corporation;
- j. develop and approve business plans;
- k. approve any affiliation by the Corporation with one or more entities in any partnership, joint venture or joint enterprise;
- l. authorize any change in the character or business purpose of the operations of the Corporation; and
- o. approve any merger or consolidation of the Corporation with any other organization or entity.

ARTICLE VI

MEMBERSHIP OF THE BOARD OF DIRECTORS

1. Appointment. Members of the Board of Directors will be appointed by the Region's chief elected officials in accordance with applicable local intergovernmental agreements and in compliance with criteria established by the state of Florida and the federal government, and will be composed of at least the following:

- a. representatives of the private sector, who must constitute a minimum of fifty-one percent (51%) of the Board, and who will be representatives of private, for-profit businesses and be chief executives, chief operating officers or other executives who have substantial management or policy responsibility; and

- b. such other representatives as may be required or permitted by applicable federal or state law, regulations or directives.

2. Term. Unless otherwise indicated under the terms of a Director's appointment, the term of each Director's appointment will be three (3) years, beginning the first day of July of the year of appointment, and continuing through the last day of June in the year three (3) years hence, except that a Director may serve until December of the last year of the term, or until action regarding that Director's seat is taken, whichever occurs first. Subject to applicable law, one third (1/3) of all terms will expire annually. Directors will be eligible for re-appointment without re-nomination for an additional term having a maximum of three (3) years.

3. Qualifications. Directors must be citizens or permanent residents of the United States of America, duly appointed pursuant to Section 1 of this Article, and will, at all times, comply with the requirements established by the state of Florida, the federal government and any applicable intergovernmental agreement.

4. Vacancies. Vacancies during the term of a Director's appointment will be filled in an appropriate timeframe upon receipt of sufficient nominations for the vacancy. The person appointed to fill the vacancy will serve the remaining term of the prior Director and may be re-appointed as provided in Section 2 of this Article.

ARTICLE VII

OFFICERS AND THEIR DUTIES

1. Election of Officers. All officers will serve 1 year terms. The Chairman can serve for 2 consecutive terms. At the conclusion of the Chairman's term, he or she will serve as immediate Past Chair on the Executive Committee. In addition, the Board of Directors will have the power to:

- a. appoint such other officers it deems necessary or appropriate;
- b. fill any vacancy in any office occurring for any reason whatsoever, by election, by majority vote of a quorum; and
- c. employ a President/CEO who will (i) be responsible and accountable to the Board, (ii) act on the Board's behalf in the conduct of its directives, and (iii) be responsible for employment, oversight and management of all other staff and employees of the Corporation.

2. Removal of Directors and Officers. Any Director or officer may be removed by a vote of two thirds (2/3) of the Board at a properly noticed meeting whenever, in the judgment of the Board, the best interests of the Corporation will be served. Failure to attend (in person or by teleconference) at least seventy-five percent (75%) of the

regularly scheduled Board meetings or regularly scheduled committee meetings of which a Director is a member without approval by the Chairman of the Board may result in the immediate removal of any Director or officer.

3. Delegation. For any reason it deems appropriate, the Board may delegate any power or duty to any Director or officer, including to the President/CEO or his or her staff designee, but no Director or officer will execute, acknowledge or verify any document or instrument in more than one capacity.

4. Compensation. No compensation will be paid to the Directors for the services performed by them for the Corporation as Directors. Directors may be reimbursed for expenses incurred when traveling on official business of the Corporation if approved by the Chairman of the Board. Such reimbursement must conform to the Corporation's established travel policy.

5. Duties of the Chairman. The Chairman will:

- a. preside at all meetings of the Board and determine the agenda for all Board meetings in consultation with the President/CEO;
- b. make all committee appointments other than the officers elected under Section 1 of this Article;
- c. be a member ex-officio of all committees with the exception of the Executive Committee, for which the Chairman may opt to serve either as committee chairman or as a regular committee member; and
- d. perform all other duties assigned to the Chairman under these Bylaws and those usually pertaining to the office of Chairman.

6. Duties of the Vice Chairman: The Vice Chairman will:

- a. preside at all meetings of the Board in the absence of the Chairman;
- b. be a member of the Executive Committee;
- c. assist the Chairman, when requested, in the performance of the Chairman's duties; and
- d. perform all such other duties usually pertaining to the office of Vice Chairman, including acting as the Chairman during the absence or disability of the Chairman.

7. Duties of the Treasurer. The Treasurer will:

- a. oversee the custody of all funds and securities of the Corporation and the collection of interest thereon;
- b. oversee the accounts of the Corporation and report thereon at each regular meeting of the Board of Directors;
- c. make a report at each meeting of the Board of Directors and special reports when requested;

- d. oversee the preparation and filing of reports and returns required by all governmental agencies; and
- e. serve as Chairman of the Finance Committee.

8. Duties of the Secretary. The Secretary will:

- a. ensure that minutes of each meeting are recorded;
- b. be responsible for advising the Board of omissions and corrections to the minutes;
- c. ensure that copies of the minutes are timely transmitted to all members of the Board of Directors;
- d. ensure that all meetings are noticed as required by statute, these Bylaws or regulations;
- e. ensure that attendance is recorded at meetings;
- f. ensure that committee reports are maintained;
- g. ensure that the record books of the Corporation are maintained; and
- h. perform such other duties as may be delegated by the Board of Directors.

9. President and Chief Executive Officer. The President and Chief Executive Officer (“**President**”) will be nominated by the Executive Committee and confirmed by the Board of Directors. The President will be a full-time employee of the Corporation and not a member of the Board of Directors. The President will be reviewed annually by the Executive Committee and the President’s salary and bonuses will be set by the Executive Committee. The President may only be terminated upon the recommendation of a majority of the members of the Executive Committee and a majority vote of the Board of Directors. The President will be the chief executive officer of the Corporation and will be responsible for the general and active management of the business and affairs of the Corporation, subject to the direction of the Executive Committee and the Board of Directors.

10. Chief Operating Officer. The Chief Operating Officer (“**COO**”) will be hired by the President with the advice of Executive Committee. The COO will not be a member of the Board of Directors, but will be an officer and full-time employee of the Corporation. The COO will direct, administer and coordinate the day-to-day activities of the Corporation consistent with the directions, policies, goals and objectives established by the President and the Board of Directors and as set forth in the job description for this position.

11. Chief Financial Officer. The Chief Financial Officer (“**CFO**”) will be hired by the President with the advice of the Chairman. The CFO will not be a member of the Board of Directors, but will be an officer and full-time employee of the Corporation. The CFO will direct the Corporation’s financial operations and accounting practices

consistent with the directions, policies, goals and objectives established by the COO, President, and the Board of Directors and as set forth in the job description for this position approved by the Executive Committee.

ARTICLE VIII

BOARD COMMITTEES

1. Committees. The Board will create standing committees as follows: Executive, Finance, Audit, Career Services , Governance, , and Community Engagement. In addition, the Chairman of the Board of Directors will have the authority to establish such other standing or ad hoc committees deemed necessary or desirable to the conduct of the Corporation's business. The Chairman of the Board will make appointments to all committees and will appoint the chairman of each committee. Any committee may include members appointed by the Chairman of the Board who are voting members of the committee but not members of the Board of Directors. Any item voted on by a committee (other than approval of meeting minutes and meeting adjournments) will be reported to the Executive Committee at its next meeting.

2. Executive Committee. The Executive Committee will have a minimum of five (5) members, consisting of the officers elected under Article VII, Section 1, and the chairs of the standing committees. The Chairman will endeavor to ensure that each of the five (5) counties in the Region is represented on the Executive Committee. The Executive Committee will have and exercise the full authority of the Board of Directors in the management of the Corporation's business between meetings of the Board of Directors. The Chairman of the Board may choose to serve as chairman of the Executive Committee or may choose to appoint another member of the Executive Committee to serve in such capacity. In the event that the Chairman of the Board chooses not to serve as Chairman of the Executive Committee, he or she will serve as a voting member of the Executive Committee. After completion of the Chairman term, he or she will serve on Executive Committee for 1 year as Immediate Past Chairman. Except as otherwise set forth in these Bylaws, the Executive Committee will serve as the personnel committee with the delegated authority to take final action on all appropriate executive personnel matters.

3. Finance Committee. The Finance Committee will be chaired by the Treasurer and will consist of those Directors recommended by the Treasurer and appointed by the Chairman of the Board of Directors. The Finance Committee will be responsible for assisting the Treasurer in the conduct of his or her responsibilities as set forth in Article VII, Section 7; reviewing periodic reports on the financial activities of the Corporation;

controlling and supervising the financial affairs of the Corporation; overseeing the Corporation's retirement plan; and approving budgets and budget amendments.

4. Audit Committee. The Audit Committee will be chaired by a Director appointed by the Chairman of the Board of Directors and will consist of members appointed by the Chairman of the Board. The Audit Committee will be responsible for:

- a. overseeing the annual audit(s) of the Corporation's programs required under applicable laws, regulations or directives (including OMB Circular A-133), including selection of the auditor and approval of annual audit plans;
- b. providing oversight of the Corporation through review of monitoring reports and audits of the Corporation;
- c. making recommendations to the Board of Directors on the selection of an independent auditor and regarding such auditor's compensation and terms of engagement;
- d. receiving and reviewing the annual audit reports from the independent auditor;
- e. reviewing and approving the Corporation's responses to any adverse findings regarding the financial affairs of the Corporation, including, but not limited to, adverse monitoring reports, financial audits, management decision letters, Office of Inspector General's investigative reports and final determination letters;
- f. reviewing, in consultation with the independent auditor and management, the Corporation's financial statements;
- g. reviewing and evaluating the adequacy of internal accounting controls and practices and making recommendations for revisions and additions as necessary or appropriate; and
- h. reviewing and evaluating the Corporation's ethics and conflict-of-interest policies and procedures and, whenever the Chairman of the Board or the committee deems appropriate, investigating any alleged violations of such policies and procedures.

5. Career Services Committee. The Career Services Committee will be chaired by a Director appointed by the Chairman of the Board of Directors and will consist of members appointed by the Chairman of the Board. The Career Services Committee will oversee the Corporation's operations plan as part of the Workforce Innovation and Opportunity Act ("WIOA") and all other program activities that support job seekers and businesses in the Region.

6. Governance Committee. The Governance Committee will be chaired by a Director appointed by the Chairman of the Board of Directors and will consist of

members appointed by the Chairman of the Board. The Governance Committee will be responsible for reviewing the Corporation's Articles and By-laws and recommending changes to the Board of Directors; identifying a process to recruit board members and officers; and evaluating the Board's effectiveness.

7. 8. Community Engagement Committee. The Community Engagement Committee will be chaired by a Director appointed by the Chairman of the Board of Directors and will consist of members appointed by the Chairman of the Board representing expertise in outreach marketing and media relations. The Community Engagement Committee will recommend strategies and policies to ensure the Corporation is, through appropriate outreach, aligned and engaged with other community, civic and economic-development activities.

ARTICLE IX

CONDUCT OF BUSINESS

1. Annual Meeting. The Annual Meeting of the Board of Directors of this Corporation will be held in the month of June.

2. Regular Meetings. At a minimum, regular meetings of the Board of Directors will be held quarterly, in the months of September, December, April and June.

3. Special Meetings. Special meetings of the Board of Directors may be held at the call of the Chairman or by written request of ten (10) or more members of the Board of Directors.

4. Notice. Reasonable notice in writing of each meeting, whether annual, regular, special or emergency, will be provided to each member of the Board of Directors of the Corporation at his or her contact place on file with the Secretary. Such notice may be by e-mail or other reliable means of electronic transmission. The Corporation's meetings will be publicly announced in accordance with Section 286.011, Florida Statutes.

5. Order of Business. Business will be conducted to the extent feasible in accordance with Roberts' Rules of Order, as newly revised.

6. Quorum. A quorum for all Board meetings will require that at least fifty percent (50%) of the Board members be present. If there is less than a quorum at any meetings, a majority of those present may adjourn the meeting. A quorum for all committee meetings will be the same as the quorum for Board meetings and require that at least fifty percent (50%) of the Board members who are committee members be present.

7. Voting. Directors may not be represented at any meeting by an alternate, nor may proxies be given. Each Director will have one (1) vote upon every issue properly submitted to vote at any meeting of the Corporation, except that no Director may cast a vote on any matter on which he or she has or appears to have a conflict of interest, as defined by federal or state law or under the Corporation's policies then in effect. Any Director who has such a conflict of interest must declare the same and refrain from discussion at the meeting and voting on the issue.

8. Majority Rule. All matters before the Board will be determined by a majority vote of Directors present at the meeting with a quorum present, with the exception of the following, either of which must be approved by a vote of two-thirds (2/3) of the Board's total membership:

- a. amendments to these Bylaws (as provided under Section 13 below); and
- b. any contract or agreement between the Corporation and a Director, a relative (as defined in s. 112.3143[1][b], Florida Statutes) of a Director, or any contract or agreement that would be a conflict for any such Director as defined by federal or state law or under the Corporation's policies then in effect.

9. Meetings by Telephone or Teleconference. Members of the Board of Directors or any committee may participate in a meeting by means of telephone conference or similar communication method by which all persons participating in the meeting can hear each other at the same time. Any such participation will constitute presence in person at the meeting.

10. Business Affairs; External Audit. Subject to applicable law, the Board of Directors may solicit, borrow, accept, receive, invest and expend funds from any public or private source. The award of procurement contracts with vendors and the award of subrecipient contracts will be in accordance with applicable federal and state law and regulations. The Corporation's accounts and records will be audited annually by a firm of certified public accountants at the expense of the Corporation; and a copy will be available on request for each Director to review.

11. Investments. Any investments of funds of the Corporation must first be approved by the Finance Committee and recommended to the Board of Directors for its approval.

12. Fiscal Year. The fiscal year of the Corporation will be July 1 to June 30.

13. Amendments to Bylaws. Amendments to these Bylaws of the Corporation may be proposed by any member of the Board of Directors. The Board of Directors, by a two thirds (2/3) vote of the its membership, may amend, revise, add to, repeal or rescind these Bylaws or adopt the new bylaws at any meeting of the Board of Directors,

provided that written notice of any amendment, revision, addition, repeal or rescission of these Bylaws or adoption of new bylaws must be published and given to the Directors at least thirty (30) days preceding the date of the meeting of the Board of Directors at which such action is to be considered.

14. Conflicts with Laws. The Corporation will abide by all applicable federal and state laws and regulations, which will supersede any provision of these Bylaws in conflict with any such law or regulation.

15. Books and Records. The Corporation will keep correct and complete books and records of account and financial statements and will also keep minutes of the proceedings of the Board of Directors and all committees. Such books and records will be available to all Directors on request and to members of the general public in accordance with applicable law.

16. Indemnity. Subject to applicable law, any current or former member of the Board of Directors or officer who is made a party to or called as a witness with respect to any threatened or pending legal proceeding will be indemnified by the Corporation against all costs and expenses (including attorneys' fees, judgments, fines and amounts paid in settlement) reasonably incurred by him or her in connection with such proceeding, including any appeal thereof, if he or she acted in good faith and in a manner he or she reasonably believed to be in or not opposed to the best interests of the Corporation and, with respect to any criminal action or proceeding, had no reasonable cause to believe his or her conduct was unlawful. The termination of any proceeding by judgment, order, settlement, conviction or upon a plea of nolo contendere or its equivalent, will not create a presumption that the person did not act in good faith and in a manner which he or she reasonably believed to be in or not opposed to the best interests of the Corporation, and, with respect to any criminal action or proceeding, did not have reasonable cause to believe that his or her conduct was unlawful. The Board of Directors will determine, by a majority vote of a quorum consisting of Directors who are not parties or witnesses to the proceeding, whether indemnification is appropriate as provided in this section. If this section or any portion of it is invalidated on any ground by a court of competent jurisdiction, the Corporation will nevertheless indemnify each director and officer of the Corporation to the fullest extent permitted by portions of this section not invalidated and to the fullest extent permitted by law.

17. D&O Insurance. The Corporation will purchase and maintain in full force and effect a policy or policies of directors and officers insurance covering its Directors and officer with minimum coverage of \$1 million, unless the Executive Committee, in consultation with the Treasurer, finds that such insurance is no longer available on commercially reasonable terms or that the premiums for such will be unreasonably high. In addition, the Corporation may purchase and maintain insurance on any person

who is or was a Director, officer, employee, or agent of the corporation against any liability asserted against such person and incurred by him or her in any such capacity or arising out of his or her status as such, whether or not the Corporation would have the power to indemnify the person against such liability under the provisions of Section 16 of this Article.

ATTACHMENT C

DRAFT

Annual Performance Report as a Direct Provider of Workforce Services

CareerSource Central Florida – Region 12

Career Source Central Florida is currently operating as a direct service provider under previous Department of Economic Opportunity authorization from July 1, 2014 through June 30, 2017. CSCF received continued designation as a One-Stop Operator in May 2017 to provide services from July 1, 2017 through June 30, 2020.

As stated in Final Guidance OSPS-83, a year-end report is presented to the Department of Economic Opportunity responding to the following areas:

1. An analysis of the actual cost savings realized as a result of providing the direct workforce services
2. A description of any improvements to the local service delivery system and/or performance outcomes.
3. Descriptions of “best practices” that could be shared with other regional workforce boards.

1. ANALYSIS OF COST SAVINGS AND IMPACT ON DIRECT SERVICES

CareerSource Central Florida continues to experience significant administrative cost savings as a designated direct service provider. The 2016-2017 program year ended with administrative costs at 8% and considerably lower than the state requirement of 10%, representing an annual savings of approximately \$608,588 dollars subsequently allocated to direct services. Within program services, Region 12 spent 92% on direct client services, with 64.17% on direct client intensive training activities exceeding the state requirement of 50.0%. Because of CareerSource Central Florida’s intentional focus on directing program funds to training, Region 12 consistently meets or exceeds the state goal. CSCF has never requested a waiver lowering the requirement since the inception of the 50% ITA state requirement.

RWB	SFY 16-17 Program Expenditures	Total State ITA Expenditures	% State ITA Exp.	Annual ITA Expenditure Requirement	Difference
01	1,418,923	496,761	35.01%	35.00%	0.01%
02	556,659	281,909	50.64%	30.00%	20.64%
03	723,418	153,595	21.22%	15.00%	6.22%
04	767,477	313,650	40.87%	30.00%	10.87%
05	1,809,267	584,652	32.31%	30.00%	2.31%
06	631,171	320,348	50.75%	25.00%	25.75%
07	502,064	164,924	32.85%	25.00%	7.85%
08	6,328,057	4,175,575	65.99%	40.00%	25.99%
09	851,419	248,178	29.15%	20.00%	9.15%
10	2,202,879	788,583	34.66%	25.00%	9.66%
11	3,105,596	1,589,557	51.18%	50.00%	1.18%
12	10,373,934	6,656,808	64.17%	50.00%	14.17%
13	2,379,210	762,055	32.03%	30.00%	2.03%
14	3,030,929	2,515,167	83.08%	50.00%	33.08%
15	5,760,327	3,712,731	64.45%	50.00%	14.45%
16	2,734,054	2,078,565	76.00%	50.00%	26.00%
17	3,081,590	2,157,481	70.01%	50.00%	20.01%
18	2,339,706	1,031,469	44.09%	30.00%	14.09%
19	808,329	250,210	27.85%	30.00%	-2.15%
20	2,461,724	872,035	35.42%	30.00%	5.42%
21	4,921,519	1,697,496	34.49%	30.00%	4.49%
22	6,992,823	4,217,628	60.31%	50.00%	10.31%
23	15,331,677	7,484,606	48.82%	40.00%	8.82%
24	5,310,000	3,457,569	65.11%	50.00%	15.11%
Grand Total	104,125,517	49,511,444			

Figure 1 RWB Training Expenditures

See Figure 1 – RWB FY2016-17 Training Expenditures signifying CareerSource Central Florida as one of the leading regions in percentage of funding allocated to Individual Training Accounts, Occupational Skills Training, and Internships.

CareerSource Central Florida will realize sufficient cost savings over the next five years since its consolidation of two one-stop centers to high-traffic locations. In PY 16-17, CSCF consolidated its South Orange and East Orange location into one office space near the Orlando International Airport, realizing a cost savings of \$1M in facility costs over a five year term. For PY 17-18, CSCF expects to review its Facilities Plan to identify the feasibility of increasing access to services through shared resource arrangements with community partners. To this end, CSCF is working with Lake Sumter State College on the feasibility of co-locating.

Allocating Service Dollars

As a direct operator of services, CareerSource Central Florida has demonstrated the ability to strategically plan and adjust administrative costs, and establish a reasonable cost allocation methodology, allowing more resources to support business and career services.

CSCF's budget for PY 2017-2018 represented a continued decrease in funding from the previous year of approximately 11%. The organization was able to maintain the same levels of direct services while also investing in necessary staff development and IT infrastructure to support more efficient solutions to provide workforce services.

Figure 2 - FY16-17/17-18 Budget Comparison represents a snapshot of current year budget compared to the prior year expenditures.

Funding Sources	FY 2017-18	FY 2016-17	\$ Change	% Change
Carry In Funds from FY 16 - 17	5,657,409	6,270,182	(612,773)	-9.8%
FY 17 - 18 Award	25,991,131	27,626,333	(1,635,202)	-5.9%
Award Total + Available Funds	31,648,540	33,896,515	(2,247,975)	-6.6%
LESS planned Carryover for FY 18 - 19	(3,773,540)	(3,680,301)	(93,239)	2.5%
Total Available Funds Budgeted	27,875,000	30,216,214	(2,341,214)	-7.7%
Salaries/Benefits	12,220,500	14,113,700	(1,893,199)	-13.4%
Career & Youth Services	10,500,000	10,700,000	(200,000)	-1.9%
Professional Fees	870,000	629,500	240,500	38.2%
Outreach	232,500	273,604	(41,104)	-15.0%
Infrastructure/Maintenance & Related Cost	2,622,000	2,809,710	(187,710)	-6.7%
IT Cost/Network Expenses	1,125,000	1,339,700	(214,700)	-16.0%
Staff Development & Capacity Building	305,000	350,000	(45,000)	-12.9%
TOTAL EXPENDITURES	27,875,000	30,216,214	(2,341,213)	-7.7%
ADMIN & SUPPORT				
Program Support	25,645,000	28,101,079	(2,456,079)	
Admin	2,230,000	2,115,115	114,885	
TOTAL EXPENDITURES	27,875,000	30,216,214	(2,341,213)	-8.4%
PERCENTAGE OF ADMIN TO TOTAL EXPENDITURES	8.0%	7.0%		

Figure 2 RWB Budget Comparison

2. IMPROVEMENTS TO LOCAL SERVICE DELIVERY AND PERFORMANCE

CSCF commissioned an updated a study in 2016 to again exam its effectiveness as a provider while also considering the legislative mandates under the Workforce Innovation and Opportunity Act (2016 Study Executive Summary Attached). The main finding of the 2016 program evaluation was there had been significant improvements by CSCF when comparing program outcomes from PY1213 to PY1516.

These improvements included:

- Key process data such as numbers served, numbers placed, number of services, number of job orders and number of job openings indicates that CSCF ranks near the top due to the Region's size.
- Key outcome data such as placement rates, direct placement rates and cost per job opening places have continually improved, and are a priority for CSCF.
- CSCF is delivering services in-house effectively and measures favorably when compared to those regions that contract those services.
- In general, CSCF has significantly improved its performance and relative State rankings since the original study.

Delivering Services under WIOA – First year full implementation

During PY 16-17, CSCF worked to fully implement the requirements under the Workforce Innovation and Opportunity Act. As the direct service provider, CSCF had the ability to continue its implementation of new collaborative services with apprenticeships, adult education, vocational rehabilitation, and post-secondary partners. As CSCF explored roles with its mandatory partners, increased understanding was established on how to best collaborate and increase efficiencies between partner services. These

discussions lead to CSCF and its adult education partners collaborating on an effort to combine adult education and occupational skills training for individuals that lacked a high school diploma and wanted to also gain occupational skills. CSCF and its adult education partners learned through this effort that it was difficult for participants to complete both efforts successfully, and many quickly became employed due to their newly acquired occupational skills. This experience has encourage the partners to engage in new strategies relating to placement supports, training after diploma attainment, and internships.

CSCF's Board of Directors established a definition of a Direct Service Provider and a One-Stop Operator during the program year and directed Board staff to procure a One Stop Operator responsible for coordinating services with the system's mandatory and community partners. An RFP was issued, responses obtained, and an entity selected by May 2017. The One Stop Operator was in place by July 1, 2017.

Program Performance

In providing direct workforce services to adults, dislocated workers, youth, and universal customers (Wagner Peyser), in 2016-17 CareerSource Central Florida met or exceeded 7 of the 11 measures, despite the changes of new targets

and timeframes for performance under the Common Measures. As a direct provider, CSCF is quickly working to make adjustments to its customer engagement strategies to ensure 2nd and 4th quarter performance outcomes are met.

See *Figure 3* for the DEO report on common measures.

2016 - 2017 FLORIDA WORKFORCE COMMON MEASURES – LWDA 12 PERFORMANCE
PY 2016-2017: July 1, 2016 – June 30, 2017 Outcomes

Common Measures	Performance PY 2016-2017	PY 2016-2017 Performance Goals	% of PY 2016-2017 Performance Goal Met	PY 2017-2018 Negotiated Goals	Potential % of PY 2017-18 Goal Met (Based on current performance)
Adults:					
1 Employed 2 nd Quarter After Exit	81.79%	86.00%	95.11%	80.10%	102.11%
2 Employed 4 th Quarter After Exit	65.09%	82.00%	79.38%	76.50%	85.09%
3 Median Wage 2 nd Quarter After Exit	\$6,591.00	\$7,550.00	87.30%	\$7,065.00	93.29%
Dislocated Workers:					
4 Employed 2 nd Quarter After Exit	84.80%	80.00%	106.00%	76.00%	111.58%
5 Employed 4 th Quarter After Exit	62.68%	76.00%	82.47%	74.00%	84.70%
6 Median Wage 2 nd Quarter After Exit	\$8,051.00	\$6,550.00	122.92%	\$6,850.00	117.53%
Youth Common Measures:					
7 Employed 2 nd Quarter After Exit	75.88%	73.00%	103.95%	76.00%	99.85%
8 Employed 4 th Quarter After Exit	70.27%	66.00%	106.47%	69.00%	101.84%
Wagner-Peyser:					
9 Employed 2 nd Quarter After Exit	65.87%	61.00%	107.98%	64.00%	102.92%
10 Employed 4 th Quarter After Exit	63.42%	63.00%	100.67%	66.00%	96.10%
11 Median Wage 2 nd Quarter After Exit	\$5,521.00	\$4,550.00	121.34%	\$4,850.00	113.84%

Not Met (less than 90% of negotiated)
Met (90-100% of negotiated)
Exceeded (greater than 100% of negotiated)

Figure 3 - DEO report on common measures.

Business Services

In 2016-2017, CareerSource Central Florida has worked to increase its relationships with the business community by offering tailored recruiting services and training assistance, and focusing its support of high growth industries that are key to ensuring the region's economic competitiveness. The effectiveness of the team's outreach efforts has resulted in about 60% of the previous year's businesses returning for additional services. As the unemployment rate has fallen below 4%, CSCF has increased its services to screening and connecting available talent to open employment opportunities, and less information-only services. Business Team members have worked to create connections with CSCF's industries of focus (Construction, Advanced Manufacturing, Professional and Business Services (IT), Hospitality / Tourism, and Healthcare) to increase the number of internship and employment opportunities available to career seekers within those growth industries.

3. BEST PRACTICES

2017 Summer Employment Program with Shared Resources:

CareerSource Central Florida expanded its 2017 summer youth employment program with its original partner, the City of Apopka, and added seven communities by coordinating local municipal and workforce development dollars. Programming was added to the communities of Sanford, Sumter County, Lake County, and the Orange County neighborhoods of Holden Heights, LIFT, Bithlo, and Oakridge, increasing from 137 summer 2016 participants to 300 participants in 2017.

At-risk high school student and high school graduates were given the opportunity to acquire work readiness skills and experience work in a real-world business environment while earning a wage for **seven** weeks. As the Direct Service Provider, CSCF is positioned to partner with community leaders to plan and execute a structured summer work experience program that is consistently delivered and managed.


Planning has already begun for summer 2018, and CSCF expects to add simulated work experiences that include occupational skills training. Region 12 believes that this convening of workforce and local resources is a model that can be replicated in Central Florida and across the state, and could not be achieved without the nimbleness of being a direct service provider.

ATTACHMENT D

DRAFT



POLICY TITLE: WIOA Priority of Funds Policy
POLICY NUMBER: WIOA 02

Author: Nilda Blanco, Planning and Policy Director	Effective Date: 7/01/2015	Revision Date: 3/10/2017
Description of Revision(s):	Update from Training and Employment Guidance Letter (TEGL) 19-16 which rescinds TEGL 3-15	
Approval:	Mimi Coenen, Chief Operations Officer	
Signature:		

I. PURPOSE:

The Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker programs, in coordination with the Wagner-Peyser Employment Services, are pivotal pieces of the one-stop delivery system. This policy will provide clarification on providing basic, career and training services for unemployed adults, underemployed adults and dislocated workers.

II. APPLICATION:

This document applies to all staff and/or contractor staff who are responsible for determining WIOA eligibility using Priority for Funds in Region 12

III. BACKGROUND:

The WIOA was signed into law on July 22, 2014 and is designed to help career seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need for a competitive economy.

The law authorizes career services and referral to training for adults and dislocated workers in three categories:

A. Basic Services –Services made available to all participants:

- Orientation to information and services available.
- Initial assessments of skill level, aptitudes and abilities.
- Job search and placement assistance.
- Provision of information on in-demand industry sectors, occupations and non-traditional employment.
- Labor market information to include local, regional and national requested job skills, required educational levels and wage data.
- Performance information and program cost information on eligible providers of training services.
- Information and assistance regarding filing claims for unemployment.

B. Individualized Career Services - Services made available if deemed appropriate and needed for an individual to obtain or retain employment:

- Comprehensive and specialized assessments
- In-depth interviewing and evaluation to identify challenges and appropriate employment goals.
- Development of individual employment plan
- Individual or group counseling
- Career planning
- Workforce preparation activities
- Financial literacy services
- English language acquisition service – Must be in conjunction with an occupational skills training activity.
- Short-term prevocational services – development of learning skills, communication skills, interviewing skills, personal maintenance skills and professional conduct.

C. Work-based Training (stand alone or in combination)

- Individual Training Accounts
 - Occupational Skills Training
 - Work Experience/Internship
- Customized Training
- Incumbent Worker Training
- Registered Apprenticeship
- On-the Job Training

D. Follow-up Services –

- Counseling regarding the workplace
- Confirmation of continued employment, potential wage gain and/or notification of additional employment.

Training activities can be provided in any order; with no pre-determined sequence of activities.

WIOA provides a focus on serving “individuals with challenges to employment” and seeks to ensure access to these populations by outlining a priority basis.

IV. Definitions:

Attachment B: Key Terms and Definitions

V. REFERENCES:

1. Employment and Training Administration, Training and Employment Guidance Letter WIOA No. 19-16
2. Section 134 (c)(3) (E) of WIOA
3. Section WIOA §680.600

4. Section WIOA §680.640
5. Section WIOA 134 (d)(4)
6. Section WIOA 101(d)(1) of title 10, United States Code
7. Section WIOA (16)(B)
8. Lower Living Standard Income Levels (LLSIL) – http://www.floridajobs.org/docs/default-source/2015-memoranda/memo_poverty-and-llsil_2015.pdf?sfvrsn=2
9. Asset Limited, Income Constrained, Employed (ALICE) Study of Financial Hardship – <http://unitedwayalice.org/reports.php/> ; Average Household Stability- Pg. 32 Figure 18

VI. POLICY:

A. Adult Funds – Requires Priority

Pursuant to USDOL ETA guidance in TEGL 19-16 CareerSource Central Florida (CSCF) will prioritize individuals seeking adult services. Adult is defined as an individual older than 17 and younger than 72.

Under WIOA, the term “Basic Skills Deficient” applies when an individual is unable to compute or solve problems, or read, write or speak English, at a level necessary to function on the job, in the individuals’ family or in society.

Priority for Adult eligibility must be provided in the following order:

1. Veterans and eligible spouses who are WIOA eligible and who have one or more of the barriers listed in the chart below.
2. Individuals who are not veterans or eligible spouses, but who have any one or more of the barriers listed in the chart below.
3. Veterans and their eligible spouses who do not have any of the barriers listed in the chart below.
4. Priority populations established by the Governor and/or local WDB.
5. Individuals who are not veterans and do not have any of the barriers listed below.

Adult Barriers used to Determine Priority of Service (in alphabetical order):

- Disabled individuals, as defined in WIOA section 3, paragraph 25
- English language learners, as defined in WIOA section 204
- Ex-offender, as defined in WIOA section 3, paragraph 38
- Homeless individuals, as defined in section 41403(6) of the Violence Against Women Act of 1994 (42 U.S.C) 14043e-2(6)
- Indians, Alaska Natives and Native Hawaiians as defined in WIOA section 166
- Individuals who have a low level of literacy, as defined in WIOA section 203
- Individuals facing substantial cultural barriers, as defined in WIOA section 203
- Individuals within two years of exhausting the lifetime eligibility for TANF assistance part A of Title IV of the Social Security Act (42 U.S.C. 601 et6 seq.)

- Long-term unemployed individuals, defined as individuals who have not been employed within the last 27 weeks.
- Low-income individuals as defined in WIOA section 3 paragraph 36 and locally as:
 - a. An individual receiving, or who in the past six months has received, or is a member of a family that is receiving federal, state or local public assistance;
 - b. An individual with a family income that does not exceed 200% of the lower living standard income level;
- Older individuals , aged 55 or older as defined in WIOA section 3 paragraph (39)
- Migrant and/or seasonal farmworkers as defined in WIOA section 167 (1)
- Single parents
- Single pregnant women
- Youth who are in or have aged out of the foster care system.

B. Household Self Sufficiency:

Region 12 has defined low income as 200% for a metro area based on size of the household per the Lower Living Standard Income Level (LLSIL). Low-income is based on a federally issued Lower Living Income Standard Level chart that is updated annually. Knowing what it- takes to survive in our local operating area with housing, basic food and clothing needs, CSCF determined this level will allow us to use our resources to serve more individuals.

Family Unit Size	Annual Income Threshold (200% of Poverty Level - Metro)
1	\$26,332
2	\$43,146
3	\$59,218
4	\$73,110
5	\$86,288
6	\$100,918
7	\$115,548
8	\$130,178

C. Dislocated Worker Funds – WIOA statutory priority use of funds does not apply to Dislocated Workers. Individuals may also receive career and follow up services as a dislocated worker if they meet one of the following descriptions.

A DISLOCATED WORKER is an individual who—

Dislocated Worker Category 1:

- Has been terminated, laid off, or who has received a notice of termination or layoff, from employment; and
- Is eligible for or has exhausted entitlement to unemployment compensation; and
- Is unlikely to return to a previous industry or occupation.

Dislocated Worker Category 2:

- Has been terminated, laid off, or who has received a notice of termination or layoff, from employment; and

- has been employed for a duration sufficient to demonstrate attachment to the workforce, but is not eligible for unemployment compensation due to insufficient earnings or having performed services for an employer that were not covered under a State unemployment compensation law; and
- Is unlikely to return to a previous industry or occupation.

Unlikely to return to previous occupation (clarification) –

Refers to the status of an unemployed worker as having limited opportunities within their previous industry or occupation for employment or re-employment as confirmed by labor market information. This could include personal and/or confidential information that must be determined on a case-by-case basis.

Examples include but are not limited to:

- The industry and/or occupation is in decline or the job has become obsolete.
- The dislocated industry and/or occupation is in demand and the individual's occupational skills are no longer in demand or outdated or lack the education degree/certification required by industry.
- The individual is not able to relocate to an area that has jobs in demand for which s/he is qualified.
- The individual is not able to work in another capacity in the occupational area from which s/he was dislocated because of physical or mental limitations. An individual may have been employed in an industry or occupation performing physically or mentally demanding tasks but is no longer capable of performing the essential requirements of the job.

Dislocated Worker Category 3:

- Has been terminated, laid off, or has received a notice of termination or layoff, as a result of any permanent closure of, or any substantial layoff at a plant, facility, or enterprise.

Dislocated Worker Category 4:

- Is employed at a facility at which the employer has made a general announcement that such facility will close within 180 days.

Dislocated Worker Category 5:

- Was self-employed (including employment as a farmer, a rancher, or a fisherman) but is unemployed as a result of general economic conditions in the community in which the individual resides or because of natural disasters.

Dislocated Worker Category 6:

- Is a displaced homemaker defined as an individual who has been providing unpaid services to family members in the home and has been dependent on the income of another family member but, is no longer supported by that income; or is the dependent spouse of a member of the Armed Forces on active duty and whose family income is significantly reduced because of deployment, or a call or order to active duty, or a permanent change of

station, or the service- connected death or disability of the member and is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.

Dislocated Worker Category 7:

- Is a spouse of a member of the Armed Forces on active duty, and who has experienced a loss of employment as a direct result of relocation to accommodate a permanent change in duty station of such member.

Dislocated Worker Category 8:

- Is the spouse of a member of the armed forces on activity duty and who is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.

D. Applicable to both Adult and Dislocated Worker Programs/Funding under WIOA:

Training services may be made available to employed, underemployed, unemployed adults or dislocated workers who, among other criteria are:

- Unlikely or unable to obtain or retain employment that leads to economic self-sufficiency; or
- Working part-time looking for full-time employment; or
- Employed in a position that is inadequate with respect to their skills and training; or
- Unlikely or unable to obtain or retain wages comparable to or higher than wages from previous employment; or
- Ready with the skills and qualifications to successfully participate in the selected programs of training services; or
- Able to select training programs that are directly linked to employment opportunities.

E. Employed Customers Referred by Business for Customized Training Self-sufficiency Standard

WIOA §680.140 Paragraph (b) (6) provides for local areas to adjust the economic self-sufficiency standards for local areas. Levels of self-sufficiency may vary by local area and the local economy; this flexibility allows local areas to tailor their services in a way that works in their local economy. In the spirit of the legislation, CSCF is making a distinction between low-income and self-sufficiency for purposes of serving individuals with WIOA funding.

Self-sufficiency is defined locally as an individual having income less than \$58,000. CSCF is basing this threshold on Heart of United Way's Asset Limited Income Constrained Employed (ALICE) report which is a comprehensive study done by Housing and Urban Development (HUD) who defines the median family income for the Orlando-Kissimmee-Sanford Metropolitan Statistical Area (MSA) as \$58,347 (HUD FY 2015 Income Limits, Median Family Income). In order to have a defined

threshold to serve business clients and job seeker customers, we are rounding the data to \$58,000. Strategically this will allow CSCF resources to provide training and skills upgrade services to a broader range of individuals while still meeting the intent of WIOA. This local self-sufficiency level represents what it takes to have basic stability in our area with housing, food, clothing, transportation and basic healthcare.

VII. INQUIRES:

Questions regarding this policy should be directed to the Director of Planning and Policy. Any updates to this policy will be communicated through the Chief Operations Officer or their designee and noted on page one of the policy.

VIII. ATTACHMENTS/RESOURCES:

Attachment A: WIOA Qualification Guide

Attachment B: Key Terms and Definitions

Attachment A: WIOA Qualification Guide

Fund	Age	Work Status	Veteran Status	Selective Service	Adult Program Barrier Criteria
WIOA Adult	18-71 Note: older than 71 may be served on a case by case basis	Authorized to work in U.S.	DD214 or any document that verifies service	If male, registered as required	<ul style="list-style-type: none"> • Disabled • English language learners • Justice Involved (Ex-offender—currently or previously involved with law enforcement) • Native Americans, Alaska Natives and Native Hawaiians • Individuals who are basic skills deficient • Individuals facing substantial cultural barriers • Individuals within two years of exhausting the lifetime eligibility for TANF assistance • Long-term unemployed individuals (not employed in the last 27 weeks) • Low Income individuals are defined as: <ol style="list-style-type: none"> a. An individual receiving, or who in the past six month, has received federal, state or local public assistance b. An individual with a family income that does not exceed the federal poverty level c. An individual with a family income that does not exceed 200% of the lower living standard income level d. An individual who is homeless e. A disabled individual whose own income meets the definition of low income regardless of family income • Older individuals, aged 55 or older • Migrant and/or seasonal farmworkers • Single parents • Single pregnant women • Youth who are in or have aged out of the foster care system

Fund	Age	Work Status	Veteran Status	Selective Service	Barriers
WIOA Dislocated Worker	There is no age limit.	<p>Dislocated Worker Category 1:</p> <ul style="list-style-type: none"> Has been terminated, laid off, or who has received a notice of termination or layoff, from employment; and Is eligible for or has exhausted entitlement to unemployment compensation; and Is unlikely to return to a previous industry or occupation. <p>Dislocated Worker Category 2:</p> <ul style="list-style-type: none"> Has been terminated, laid off, or who has received a notice of termination or layoff, from employment; and has been employed for a duration sufficient to demonstrate attachment to the workforce, but is not eligible for unemployment compensation due to insufficient earnings or having performed services for an employer that were not covered under a State unemployment compensation law; and Is unlikely to return to a previous industry or occupation. <p>Dislocated Worker Category 3:</p> <ul style="list-style-type: none"> Has been terminated, laid off, or has received a notice of termination or layoff, as a result of any permanent closure of, or any substantial layoff at a plant, facility, or enterprise. <p>Dislocated Worker Category 4:</p> <ul style="list-style-type: none"> Is employed at a facility at which the employer has made a general announcement that such facility will close within 180 days. <p>Dislocated Worker Category 5:</p> <ul style="list-style-type: none"> Was self-employed (including employment as a farmer, a rancher, or a fisherman) but is unemployed as a result of general economic conditions in the community in which the individual resides or because of natural disasters. <p>Dislocated Worker Category 6:</p> <ul style="list-style-type: none"> Is a displaced homemaker defined as an individual who has been providing unpaid services to family members in the home and has been dependent on the income of another family member but, is no longer supported by that income; or is the dependent spouse of a member of the 	DD214 or any document that verifies service	If male, registered as required	Barrier requirement does not apply to Dislocated Worker

		<p>Armed Forces on active duty and whose family income is significantly reduced because of deployment, or a call or order to active duty, or a permanent change of station, or the service- connected death or disability of the member and is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.</p> <p>Dislocated Worker Category 7:</p> <ul style="list-style-type: none"> • Is a spouse of a member of the Armed Forces on active duty, <u>and</u> who has experienced a loss of employment as a direct result of relocation to accommodate a permanent change in duty station of such member. <p>Dislocated Worker Category 8:</p> <ul style="list-style-type: none"> • Is the spouse of a member of the armed forces on activity duty and who is unemployed or underemployed <u>and</u> is experiencing difficulty in obtaining or upgrading employment. 			
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Attachment B: Key Terms and Definitions

Attachment III – Key Terms and Definitions

This attachment is not intended to be an exhaustive list of all program definitions, see WIOA sec. 3 and 20 CFR 675.300 for a full list of definitions.

ACTIVE DUTY (38 USC 101(21)) - means full-time duty in the active military service of the United States. Such term includes full-time training duty, annual training duty, and attendance, while in the active military service, at a school designated as a service school by law or by the Secretary of the military department concerned. Such term does not include full-time National Guard duty.

ADULT (WIOA sec. 3(2)) – means an individual who is age 18 or older.

ADULT EDUCATION AND LITERACY ACTIVITIES (§ 463.30) – means programs, activities, and services that include:

- (A) Adult education,
- (B) Literacy,
- (C) Workplace adult education and literacy activities,
- (D) Family literacy activities,
- (E) English language acquisition activities,
- (F) Integrated English literacy and civics education,
- (G) Workforce preparation activities, or
- (H) Integrated education and training

BASIC SKILLS DEFICIENT (WIOA sec. 3(5)) – means, with respect to an individual—

- (A) who is a youth, that the individual has English reading, writing, or computing skills at or below the 8th grade level on a generally accepted standardized test; or
- (B) who is a youth or adult, that the individual is unable to compute or solve problems, or read, write, or speak English, at a level necessary to function on the job, in the individual's family, or in society.

CAREER PATHWAY (WIOA sec. 3(7)) – means a combination of rigorous and high-quality education, training, and other services that—

- (A) aligns with the skill needs of industries in the economy of the State or regional economy involved;
- (B) prepares an individual to be successful in any of a full range of secondary or postsecondary education options, including apprenticeships registered under the Act of August 16, 1937 (commonly known as the “National Apprenticeship Act”; 50 Stat. 664, chapter 663; 29 U.S.C. 50 et seq.) (referred to individually in this Act as an “apprenticeship”, except in section 171);
- (C) includes counseling to support an individual in achieving the individual's education and career goals;

- (D) includes, as appropriate, education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster;
- (E) organizes education, training, and other services to meet the particular needs of an individual in a manner that accelerates the educational and career advancement of the individual to the extent practicable;
- (F) enables an individual to attain a secondary school diploma or its recognized equivalent, and at least 1 recognized postsecondary credential; and
- (G) helps an individual enter or advance within a specific occupation or occupational cluster.

CAREER PLANNING (WIOA sec. 3(8)) – means the provision of a client-centered approach in the delivery of services, designed-

- (A) To prepare and coordinate comprehensive employment plans, such as service strategies, for participants to ensure access to necessary workforce investment activities and supportive services, using, where feasible, computer-based technologies; and
- (B) To provide job, education, and career counseling, as appropriate during program participation and after job placement.

DEPLOYMENT (10 USC 991(b)) – means

- (A) A member of the Armed Forces is considered to be deployed or in a deployment on any day on which, pursuant to orders, the member is performing service in a training exercise or operation at a location or under circumstances that make it impossible or infeasible for the member to spend off-duty time in the housing in which the member resides when on garrison duty at the member's permanent duty station or homeport, as the case may be.
- (B) In the case of a member of a reserve component who is performing active service pursuant to orders that do not establish a permanent change of station, the housing referred to in paragraph (1) is any housing (which may include the member's residence) that the member usually occupies for use during off-duty time when on garrison duty at the member's permanent duty station or homeport, as the case may be.
- (C) A member is not deployed or in a deployment when the member is—
 - (i) Performing service as a student or trainee at a school (including any Government school);

- (ii) Performing administrative, guard, or detail duties in garrison at the member's permanent duty station; or
- (iii) Unavailable solely because of--
 - (1) a hospitalization of the member at the member's permanent duty station or homeport or in the immediate vicinity of the member's permanent residence; or
 - (2) a disciplinary action taken against the member.

ELIGIBLE SPOUSE – means an individual whose military active duty or veteran spouse was:

- a. Any veteran who died of a service-connected disability;
- b. Any 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; or
 - iii. Forcibly detained or interned in the line of duty by a foreign government or power;
- c. Any veteran who has a total disability resulting from a service-connected disability, as evaluated by the Department of Veterans Affairs; or
- d. Any veteran who died while a disability was in existence. A spouse whose eligibility is derived from a living veteran or service member (i.e., categories b. or c. above) would lose his or her eligibility if the veteran or service member were to lose the status that is the basis for the eligibility (e.g. if a veteran with a total service-connected disability were to receive a revised disability rating at a lower level). Similarly, for a spouse whose eligibility is derived from a living veteran or service member, that eligibility would be lost upon divorce from the veteran or service member.

ENGLISH LANGUAGE ACQUISITION PROGRAM (34 CFR 463.31) – is a program of instruction—

- (A) That is designed to help eligible individuals who are English language learners achieve competence in reading, writing, speaking, and comprehension of the English language; and;
- (B) That leads to—
 - (1)(a) Attainment of a secondary school diploma or its recognized equivalent; and
 - (b) Transition to postsecondary education and training; or
 - (2) Employment

EXIT (see 20 CFR 677.150 for full definition) – as defined for the purpose of performance calculations for the WIOA Adult, Dislocated Worker, and Employment Service programs, exit is the point after which a participant who has received services through any program meets the following criteria:

- (1) For the adult, dislocated worker, and youth programs authorized under WIOA title I, the AEFLA program authorized under WIOA title II, and the Employment Service program authorized under the Wagner-Peyser Act, as amended by WIOA title III, exit date is the last date of service.
 - a. The last day of service cannot be determined until at least 90 days have elapsed since the participant last received services; services do not include self-service, information-only services or activities, or follow-up services. This also requires that there are no plans to provide the participant with future services.

FAMILY (20 CFR 675.300) - means two or more persons related by blood, marriage, or decree of court, who are living in a single residence, and are included in one or more of the following categories:

- (A) A married couple and dependent children;
- (B) A parent or guardian and dependent children; or
- (C) A married couple.

HOMELESS INDIVIDUAL OR HOMELESS CHILDREN AND YOUTHS (WIOA sec. 3(24)(G)) – is an individual who meets any of the following criteria:

- (A) Lacks a fixed regular and adequate nighttime residence; this includes a participant who:
 - a. Is sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason;
 - b. Is living in a motel, hotel, trailer park, or campground due to a lack of alternative adequate accommodations;
 - c. Is living in an emergency or transitional shelter;
 - d. Is abandoned in a hospital; or
 - e. Is awaiting foster care placement;
- (B) Has a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings, such as a car, park, abandoned building, bus or train station, airport, or camping ground;
- (C) Is a migratory child who in the preceding 36 months was required to move from one school district to another due to changes in the parent's or parent's spouse's seasonal employment in agriculture, dairy, or fishing work; or

(D) Is under 18 years of age and absents himself or herself from home or place of legal residence without the permission of his or her family (i.e. runaway youth)

(Note- A participant imprisoned or detained under an Act of Congress or State law does not meet the definition. Additionally, a participant who may be sleeping in a temporary accommodation while away from home should not, as a result of that alone, be recorded as homeless.)

INDIVIDUAL EMPLOYMENT PLAN (20 CFR 680.170) – is an individualized career service, under WIOA sec. 134(c)(2)(a)(xii)(II), that is developed jointly by the participant and career planner when determined appropriate by the one-stop operator or one-stop partner. This plan is an ongoing strategy to identify employment goals, achievement objectives, and an appropriate combination of services for the participant to achieve the employment goals.

INDIVIDUAL WITH A DISABILITY

If an individual with a disability meets the low-income thresholds, priority can be established regardless of family size.

INDUSTRY OR SECTOR PARTNERSHIP (WIOA sec. 3(26) – means a workforce collaborative, convened by or acting in partnership with a State board or local board, that—

(A) organizes key stakeholders in an industry cluster into a working group that focuses on the shared goals and human resources needs of the industry cluster and that includes, at the appropriate stage of development of the partnership—

- (i) representatives of multiple businesses or other employers in the industry cluster, including small and medium-sized employers when practicable;
- (ii) 1 or more representatives of a recognized State labor organization or central labor council, or another labor representative, as appropriate; and
- (iii) 1 or more representatives of an institution of higher education with, or another provider of, education or training programs that support the industry cluster; and

(B) may include representatives of—

- (i) State or local government;
- (ii) State or local economic development agencies;
- (iii) State boards or local boards, as appropriate;
- (iv) a State workforce agency or other entity providing employment services;
- (v) other State or local agencies;
- (vi) business or trade associations;
- (vii) economic development organizations;
- (viii) nonprofit organizations, community-based organizations, or intermediaries;
- (ix) philanthropic organizations;
- (x) industry associations; and

(xi) other organizations, as determined to be necessary by the members comprising the industry or sector partnership.

INTEGRATED EDUCATION AND TRAINING (34 CFR 463.35) – refers to a service approach that provides adult education and literacy activities concurrently and contextually with workforce preparation activities and workforce training for a specific occupation or occupational cluster for the purpose of educational and career advancement.

LOW-INCOME INDIVIDUAL (WIOA sec. 3(36)) – means an individual who—

(A) IN GENERAL—

(i) receives, or in the past 6 months has received, or is a member of a family that is receiving or in the past 6 months has received, assistance through the supplemental nutrition assistance program established under the Food and Nutrition Act of 2008 (7 U.S.C. 2011 et seq.), the program of block grants to States for temporary assistance for needy families program under part A of title IV of the Social Security Act (42 U.S.C. 601 et seq.), or the supplemental security income program established under title XVI of the Social Security Act (42 U.S.C. 1381 et seq.), or State or local income-based public assistance;

(ii) is in a family with total family income that does not exceed the higher of—

(I) the poverty line; or

(II) 200 percent of the lower living standard income level;

(iii) is a homeless individual (as defined in section 41403(6) of the Violence Against Women Act of 1994 (42 U.S.C. 14043e-2(6))), or a homeless child or youth (as defined under section 725(2) of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a(2)));

(iv) receives or is eligible to receive a free or reduced price lunch under the Richard B. Russell National School Lunch Act (42 U.S.C. 1751 et seq.);

(v) is a foster child on behalf of whom State or local government payments are made; or

(vi) is an individual with a disability whose own income meets the income requirement of clause (ii), but who is a member of a family whose income does not meet this requirement.

LONG TERM UNEMPLOYED INDIVIDUAL (see Bureau of Labor Statistics definition) – is a person who has been unemployed for 27 or more consecutive weeks.

NONTRADITIONAL EMPLOYMENT (WIOA sec. 3(37)) – refers to occupations or fields of work, for which individuals from the gender involved comprise less than 25 percent of the individuals employed in each such occupation or field of work.

PARTICIPANT (20 CFR 677.150) – is a reportable individual who has received services other than the services described in paragraph (a)(3) of this section, after satisfying all applicable programmatic requirements for the provision of services, such as eligibility determination.

- (1) For the Vocational Rehabilitation (VR) program, a participant is a reportable individual who has an approved and signed Individualized Plan for Employment (IPE) and has begun to receive services.
- (2) For the WIOA title I youth program, a participant is a reportable individual who has satisfied all applicable program requirements for the provision of services, including eligibility determination, an objective assessment, and development of an individual service strategy, and received 1 of the 14 WIOA youth program elements in sec. 129(c)(2) of WIOA.
- (3) The following individuals are not participants:
 - a. Individuals in an Adult Education and Family Literacy Act (AEFLA) program who have not completed at least 12 contact hours;
 - b. Individuals who only use the self-service system;
 - i. Subject to paragraph (a)(3)(ii)(B) of this section, self-service occurs when individuals independently access any workforce development system program's information and activities in either a physical location, such as a one-stop center resource room or partner agency, or remotely via the use of electronic technologies.
 - ii. Self-service does not uniformly apply to all virtually accessed services. For example, virtually accessed services that provide a level of support beyond independent job or information seeking on the part of an individual would not qualify as self-service.
 - c. Individuals who receive information-only services or activities, which provide readily available information that does not require an assessment by a staff member of the individual's skills, education, or career objectives.

REPORTABLE INDIVIDUAL (20 CFR 677.150) – is an individual who has taken action that demonstrates an intent to use program services and who meets specific reporting criteria of the program, including:

- (1) Individuals who provide identifying information;
- (2) Individuals who only use the self-service system; or
- (3) Individuals who only receive information-only services or activities.

SERVICE CONNECTED (38 USC 101(16)) – means, with respect to disability or death, that such disability was incurred or aggravated, or that the death resulted from a disability incurred or aggravated, in line of duty in the active military, naval, or air service.

TRANSITIONAL JOB (20 CFR 680.190) – is a time limited work experience that is wage-paid and subsidized, and is in the public, private or non-profit sectors for those individuals with barriers to employment who are chronically unemployed or have inconsistent work history, as determined by the Local Workforce Development Board. These jobs are designed to enable an individual to establish a work history, demonstrate work success in an employee-employer relationship, and develop the skills that lead to unsubsidized employment.

UNEMPLOYED ADULT – is an individual who is not employed at the time of his/her first WIOA enrolled service.

UNDEREMPLOYED ADULT – is defined as an individual whose current wages are a minimum of 20% lower than his/her previous employment or meets the definition of low income, and CSCF staff has determined him/her unlikely or unable to retain or obtain employment that leads to self-sufficiency. CSCF staff must be able to determine and document that the individual has the skills and qualifications to successfully participate and complete a program before he/she can be enrolled in training. Individuals who are underemployed and meet the definition of a low-income individual may receive career and training services under the Adult program on a priority basis. Individuals who meet the definition of an individual with a barrier to employment who are underemployed, may also be service in the Adult program; however, unless they are a recipient of public assistance, a low income individual or are basic skills deficient, they are not eligible for service on a priority basis.

WORK EXPERIENCE (OR INTERNSHIP) (20 CFR 680.180) – is a planned, structured learning experience that takes place in a workplace for a limited period of time. Internships and other work experiences may be paid or unpaid, as appropriate and consistent with other laws, such as the Fair Labor Standards Act. An internship or other work experience may be arranged within the private for profit sector, the non-profit sector, or the public sector. Labor standards apply in any work experience setting where an employee/employer relationship, as defined by the Fair Labor Standards Act, exists. Transitional Jobs are a type of work experience.

WORKFORCE PREPARATION ACTIVITIES (34 CFR 463.34) – include activities, programs, or services designed to help an individual acquire a combination of basic academic skills, critical thinking skills, digital literacy skills, and self-management skills, including competencies in:

- (A) Utilizing resources;
- (B) Using information;
- (C) Working with others;
- (D) Understanding systems;
- (E) Skills necessary for successful transition into and completion of postsecondary education or training, or employment; and
- (F) Other employability skills that increase an individual's preparation for the workforce.

ATTACHMENT E

DRAFT



OFFICIAL POLICY DOCUMENT

Department: Finance

Revises:

Policy Name: Procurement Policies and Procedures **Date Effective:** 7/1/17

Last Review Date:

Approved by: _____
President/CEO Date

Approved by: _____
Board Chair Date

I. PURPOSE:

To ensure the purchase of goods and services is conducted in an open manner with competitive pricing, proper management and oversight controls to ensure Finance accountability and efficiency and to prevent waste, fraud and abuse and avoid acquisition of unnecessary or duplicative items.

II. APPLICATION:

This policy applies to all CareerSource Central Florida purchases as well as that of its subrecipients. Subrecipient requirements are stipulated in their contracts.

III. POLICY:

It is CareerSource Central Florida's policy to competitively procure all goods and services. The extent of competition will be consistent with the dollar amount, but in general, procurements will be conducted in an open manner, available to the public for response and all procurement decisions will be documented. In general, except for small purchases, all procurements will be publicly advertised and a minimum of three responses will be required in order to make a purchase. If fewer than three responses are received, and there is sufficient time before the good or service is needed, CareerSource Central Florida will attempt to obtain additional responses. After a public solicitation, if only one bid is received,

it will be evaluated under the rules governing sole source purchases and a cost analysis.

Procurements necessary for the day-to-day operation of CareerSource Central Florida and the one-stop career centers will be approved by the CareerSource Central Florida President/CEO or his/her designee as described herein. The CareerSource Central Florida President/CEO is authorized to approve contracts for goods, services or training, including (among others) on-the-job training, work experience, customized training and employed/incumbent worker training, for amounts of \$150,000.00 or less. Contracts involving CareerSource Central Florida Board members or their companies, however, must be approved by a minimum 2/3 vote of the Board, irrespective of the amount. Contracts for more than \$150,000.00 require approval by a majority of the Board.

These policies and procedures will also apply to all CareerSource Central Florida subrecipients purchasing goods and services with funds awarded by CareerSource Central Florida, except for governmental units subject to their own procurement guidelines or subrecipients that have submitted their procurement guidelines to CareerSource Central Florida for review and have received CareerSource Central Florida approval.

IV. DEFINITIONS

Aggregate: The total cost needed over the course of a program year. Breaking down an aggregate purchase into smaller units, which fall below the threshold for a bid or an approval requirement, is prohibited.

Award: Notice to a bidding contractor of acceptance of the submitted bid, RFP or RFQ.

Bid: A response to a formal invitation to submit a price for a good or a service.

Blanket-Purchase Order (BPO): A blanket purchase order or agreement is a simplified method of filling anticipated recurring needs for supplies or services by establishing charge accounts or credit with qualified vendors.

Credit Card: A CareerSource Central Florida corporate credit card or similar payment device issued to WCF.

Price Comparison: The collection of prices for the same or similar good or service.

Proposal: A response to a solicitation.

Purchase Order (PO): A commercial document issued by a buyer to a seller, indicating types, quantities, and agreed prices for products or services the seller

will provide to the buyer. Sending a PO to a supplier may constitute a legal offer to buy a product or service. A purchase order is a component of internal controls and follows an authorization process that begins with a Purchase Requisition.

Purchase Requisition: An authorization for the Finance Department to purchase or, if required, procure the good or service requested. It originates with the individual or department requesting the good or service and must be approved by the department's director making the request. It should contain a description and quantity of the goods or services to be purchased, the specific reason for the request, and a funding-source justification. The purchase requisition should not be changed by the Finance Department without obtaining documented approval from the originating department.

Request for Proposal (RFP): A publicly solicited request listing the technical requirements and specifications that must be met, along with criteria that will be used to evaluate the proposal. See Section 3C for dollar-threshold requirements.

Request for Qualifications (RFQ): A publicly solicited request to obtain information from potential vendors that meet desired qualifications. See Section 3C for dollar-threshold requirements.

Sole Source: Goods or services procured from one source without competitive procurement.

Solicitation: A publicly advertised RFP or RFQ issued by CareerSource Central Florida.

Specifications: A clear and accurate description of the goods and services to be purchased, including the technical requirements, quantities, and all requirements that must be fulfilled to secure the award.

V. PROCEDURE

CareerSource Central Florida will adhere to procurement standards to ensure fiscal accountability and efficiency and to prevent fraud, waste and abuse. All procurements will have sufficient explanation so that anyone monitoring the file can readily ascertain its purpose, cost and justification.

A. PROCUREMENT of GOODS and SERVICES

1. All purchases of goods and services, other than those described herein, will be initiated with a purchase requisition following an acceptable method of procurement as described in paragraph V.A.3. below. The department initiating the purchase must provide an estimate of the total number of units of a good or a service needed over the course of a program year. Breaking down an aggregate purchase into smaller units that fall below the threshold

for a bid or approval requirement is prohibited. Purchase requisitions must be authorized by the appropriate approving authority.

- a) Purchase requisitions for office supplies will be submitted to the requesting individual's departmental Director for approval and then shall be forwarded to the Executive Coordinator for online ordering. Purchases are made in accordance with an acceptable method of procurement as described in paragraph V.A.3. All approved receiving packing slips are then forwarded to the Finance Department to match and verify with monthly invoices. Purchases of office furniture should follow the same steps noted above and be submitted to the Facilities Manager for purchasing.
- b) Purchase requisitions for copy machines, hardware, software, fax machines and other technology-based items must be submitted to the requesting individual's departmental director for approval and then be forwarded to the Chief Information Officer for purchase in accordance with an acceptable method of procurement as described in paragraph V.A.3.
- c) Purchase requisitions for all other goods or services under \$5,000 will be submitted to the departmental director for approval and, if approved, may be purchased in accordance with an acceptable method of procurement as described in paragraph V.A.3.
- d) Credit card purchases
 - 1) Less than \$1,000 does not require a purchase requisition but must be made and documented in accordance with an acceptable method of procurement as described in paragraph V.A.3.
 - 2) \$1,000 or more (Up to the limit of the staff's credit card) requires a purchase requisition and must be made and documented in accordance with an acceptable method of procurement as described in paragraph V.A.3.

e) **Exceptions**

- 1) Credit card purchases made by the President/CEO, vice presidents, or department directors for approved travel or while on travel status do not require a purchase requisition. However, upon return, the business justification for the purchase should be documented and made part of the file.
- 2) Parking fees and tolls incurred in-county or during out-of-county travel for business meetings do not require a purchase requisition. Additionally, a printout of the toll calculator from the applicable toll authorities' website can be utilized as documentation if receipts are not obtained.

- 3) Purchases for seminars and airfare and other travel-related costs are approved through a Travel Request form.
 - f) Purchases for all other goods or services \$5,000 and above will be submitted to the departmental director for approval and then forwarded to the President/CEO or COO for approval. Purchases for more than \$150,000 require approval by the Board of Directors. Upon applicable approval, the goods or services may be purchased in accordance with an acceptable method of procurement as described in paragraph V.A.3.
 - g) All Purchase Requisitions need to include the funding source(s) to be charged for the good or service, the fund/account number and, if applicable, the state contract number. This also applies to purchases that will be cost allocated within or among funding sources. (This may be obtained from the Finance Department).
 - h) For purchase requests by CareerSource Central Florida One-Stop Centers:
 - 1) The center manager must send purchase requests to the Procurement Specialist in the Finance Department.
 - 2) The Procurement Specialist will ensure the purchase is in accordance with an acceptable method of procurement as described in paragraph V.A.3., complete the purchase requisition, and obtain appropriate signatures in accordance with approval threshold requirements.
 - 3) Once appropriate approvals are obtained for the Purchase Requisition, the Procurement Specialist will act on the pending request by providing the vendor with the CareerSource Central Florida's credit card information or payment method.
 - 4) The Procurement Specialist sends a confirmation to the center manager confirming the order has been placed.
2. Ordering and Receipt of Purchased Goods and Services
- a) An employee other than the employee who requested the good or service must receive the goods and services to verify the proper count, as well as sign and date the packing slip.
 - b) Discrepancies in ordered merchandise (short delivery/returned items) must be recorded on the packing slip and forwarded to the Finance Department for follow-up with the vendor.

- c) The Finance Department will compare the goods and services received (description, unit price, quantity) to the purchase requisition using the packing slip.
 - d) Copies of the purchase requisitions, purchase orders, and packing slips must be compared by the Finance Department to ensure that duplicate invoices are not paid.
 - e) Vendor statements will be analyzed monthly to ensure that all credits have been recorded by CareerSource Central Florida and the vendor.
3. Goods and/or services necessary for the conduct of the agency's business and to implement and operate programs will be procured using one of the following acceptable methods of procurement:
- a) **NONCOMPETITIVE PROPOSAL/SOLE SOURCE** — May be used when the award of the contract under competitive negotiation or small purchase procedures is not feasible.
 - i. In general, purchases will be awarded under noncompetitive negotiations only when it is appropriate, necessary and in the best interests of CareerSource Central Florida.
 - ii. Circumstances under which a contract may be awarded by noncompetitive negotiations are limited to the following: (1) the goods or services to be procured are available only from a single source; (2) organizational exigency or emergency where the urgency for the purchase will not permit the additional time needed for competitive solicitation; or (3) after solicitation of various sources, CareerSource Central Florida determines competition is inadequate.
 - iii. A failure to properly plan for procurement is not an emergency under these rules.
 - iv. In the event of an exigency or emergency, a competitive procurement must be initiated within two years after the purchase or procurement. In other instances where sole-source procurement was used for a purchase, an attempt to solicit the goods or services through competitive procurement must be initiated within three years after the procurement.
 - v. Sole-source procurements in excess of \$150,000 require a cost or price analysis.
 - vi. Sole Source/Emergency Procurement Authorization Exhibit details required information.

- b) **SMALL PURCHASES** – “Small Purchases” relate to procurement of goods and services for which the aggregate cost is \$150,000 or less. Small purchases do not require a formal request for proposals or bids. If required under applicable law, procurements under the small purchase threshold will be bid as so required.
- i. Purchases of up to \$3,500 (micro-purchases) may be awarded without soliciting competitive quotations if CareerSource considers the price to be reasonable. To the extent practicable, the micro-purchases will be distributed equitably among qualified suppliers. A purchase requisition is required for micro-purchases.
 - ii. Purchases of \$3,500.01 to \$24,999.99 require at least two written quotes, and the written quotes will be attached to the purchase requisition or included in the procurement file for the purchase as appropriate. If the lowest-price item is not purchased, a written justification will be included in procurement file.
 - iii. Purchases of \$25,000 to \$150,000 require at least three written quotes, which will be documented and attached to the purchase requisition or included in the procurement file for the purchase as appropriate. If the lowest-price item is not purchased, a written justification will be included in the procurement file.
- c) **BIDS AND FORMAL REQUESTS FOR PROPOSALS** — Purchases over \$150,000 will be publicly advertised and a formal solicitation will be issued. The decision to issue a solicitation, along with the material elements of the solicitation, will be presented to the Board of Directors for approval. In such instances, the Board makes the final procurement decision. See CareerSource Central Florida’s Contracting Policy for specific requirements related to RFPs or other solicitations.
- d) Purchases made based upon prices established by a state contract administered by the State of Florida, Department of Management Services or cooperative purchasing contract administered by National Joint Powers Alliance (NJPA), will not require further procurement actions. When making a purchase based upon a price established by a state or NJPA contract, the contract number, year and title will be noted on the documents maintained for the CareerSource Central Florida procurement file.
- e) Purchases made based upon a procurement made by another unit of local government, or a public entity established by law, such as (among others): early learning coalitions, other regional workforce boards or the State of Florida, will not require further procurement actions because these bodies

are subject to the same or similar procurement requirements as CareerSource Central Florida. When making a purchase based upon such a procurement, a copy of the procurement should be attached to the purchase requisition or the procurement file for that item as appropriate. If the item was a sole-source procurement, CareerSource Central Florida may not rely on the procurement unless it meets the Noncompetitive Sole Source requirements described above. CareerSource Central Florida may use this method provided the body has followed the same or similar procurement guidelines as CareerSource Central Florida and can provide appropriate backup documentation.

- f) CareerSource Central Florida staff initiating purchases will seek out any available discounts and credits.
- g) CareerSource Central Florida encourages the utilization of small businesses, minority-owned firms, labor surplus area firms, and women's business enterprises whenever possible.
- h) When possible, CareerSource Central Florida may enter into state and local intergovernmental agreements where appropriate for procurement or use of common or shared goods and services and may use Federal excess and surplus property in lieu of purchasing new equipment and property.
- i) All procurement contracts and other transactions between CareerSource Central Florida and units of state and local governments using WIA funds must be conducted only on a cost reimbursement basis. No provision for profit is allowed. Any excess of revenue over costs incurred for services provided by a governmental or non-profit entity must be included in program income.
- j) CareerSource Central Florida will negotiate profit as a separate element of the price for each contract in which there is no price competition and in all cases where cost analysis is performed. Costs or prices based on estimated costs for contracts are negotiated using the Federal cost principles.
- k) The cost plus a percentage of cost or percentage of construction costs methods of contracting shall not be used.
- l) For fixed amount subawards up to the Simplified Acquisition Threshold (\$150,000), prior approval from DEO will be obtained. Payments will be based on meeting specific requirements of the Federal award and accountability is based on performance and results. The award amount will be negotiated using the cost principles as the guide. The Board will use cost, historical cost, or unit pricing data to establish the fixed amount award with assurance the sub-recipient will realize no increment above

actual cost. If the award is terminated before the completion of the project, the award amount will be adjusted. The sub-recipient will certify in writing to the Board at the end of the award that the project or activity was completed or the level of effort was expended. Prior written approval is required by the sub-recipient for changes in project leader or scope of effort.

- m) Awards will not be made to a debarred or suspended party. This is required to be verified for all sub-recipient contracts and for vendor contracts greater than or equal to \$25,000, or procurements of Federally-required audit services in any amount.

B. ITEMS REQUIRING STATE APPROVAL PRIOR TO PURCHASE

The Finance Department will submit annually a request to the State of Florida to purchase items requiring prior grantor approval in accordance with 2 CFR 200 on the appropriate form pursuant to CareerSource Florida's Administrative Policy Number 87 (*Prior Approval Administrative Policy for Regional Workforce Boards*). For the remaining items that require prior approval and which are not on the annual form, CareerSource Central Florida will complete and submit to DEO the "Prior Approval Request Form" prior to incurring expenditures. The request for approval must be followed by an appropriate procurement.

C. COST PRICE ANALYSIS

1. A cost or price analysis must be performed in connection with every procurement in excess of the Simplified Acquisition Threshold. Cost and price analyses will help ensure that:
 - a) Public funds are spent economically and the cost is reasonable.
 - b) The funds expended are appropriate in relation to the need for the service.
 - c) Vendors provided the best services at the most favorable prices.
2. An annual price analysis to document reasonableness may be conducted for goods and services ordered on an ongoing basis. In lieu of a price comparison for each purchase, an annual price analysis will be prepared for goods and services purchased on a regular basis to operate the organization. An annual estimate will be made of the value of the items to be ordered, and the proper procurement in accordance with section V.A.3. will be completed based upon the aggregate amount estimated to be necessary.
3. Where appropriate, an analysis is made of lease and purchase alternatives to determine which would be the most economical and practical procurement.

See CareerSource Central Florida's Accounting Policies and Procedures for details on lease and purchase analysis.

D. ETHICAL CONSIDERATIONS IN PROCUREMENT

- 1) CareerSource Central Florida has adopted a code of conduct related to the conduct of procurements, which is contained in CareerSource Central Florida's Contracting Policies and Procedures. CareerSource Central Florida Board of Directors and staff must comply with state and federal rules and regulations governing the conflict of interest and appearance of conflict of interest in the procurement process.
 - a) Regardless of the type of procurement, if CareerSource Central Florida desires to enter into a contract with an organization or individual represented on the Board of Directors, the contract must be approved by a two-thirds vote of the Board members present, a quorum having been established, and the Board member who could benefit financially from the transaction must declare a conflict and abstain from voting on the contract. Board members must disclose any such conflicts in accordance with the requirements of the Florida law and complete appropriate conflict-of-interest forms.
 - b) Board members and the CEO/President will complete financial disclosure forms required by the state of public officers on an annual basis
 - c) The following are prohibited in connection with any solicitation:
 - i. Acceptance or payment of gratuities, kickbacks.
 - ii. Providing confidential procurement information not made available to the general public.
 - iii. Improper communications between CareerSource Central Florida and any proposer (or its agents or representatives)
 - iv. Collusion or noncompetitive pricing practices between proposers.

E. AUTHORIZATION TO APPROVE PROCUREMENT ACTIONS, TERMINATE CONTRACTS AND TO SIGN CONTRACTS

The CareerSource Central Florida President/CEO, or the COO when the President/CEO is unavailable, is authorized to terminate contracts, sign contracts, approve sole-source procurements and take such other actions as necessary or appropriate to ensure uninterrupted business operations.

F. EMERGENCY PROCUREMENT ACTION

In an emergency, the President/CEO may make exceptions to these Procurement Policies and Procedures provided that (i) an explanation of the emergency and the specific exceptions made are fully documented in the procurement file within three business days after the purchase or procurement, (ii) the President/CEO notifies the Board chairperson of the emergency declaration and exceptions within three business days after the purchase or procurement, (iii) no exceptions may be made in contravention of applicable law, and (iv) no exceptions may be made for any purchase or procurement requiring approval by the Executive Committee of the Board or by the Board of Directors.

G. RECORDKEEPING

The Procurement Specialist will maintain a history of the procurement. Records will include mailing lists, the rationale for the method of procurement, the selection process, responses, solicitations, contract type, communications including rejection notices, the basis for the agreement price and the selection or rejection of the award and any other pertinent information. Documents may be attached to the purchase requisition or the procurement file as appropriate. All records shall be maintained for a period of seven years following final payment and closure of all pending matters (or longer, if required by applicable law).

VI. NON-EMERGENCY EXCEPTIONS

Non-emergency exceptions to this policy must be approved in writing by the President/CEO and Board chairperson provided that (i) an explanation of the specific exceptions must be fully documented in the procurement file within three business days after written approval regarding the exceptions, (ii) no exceptions may be made in contravention of applicable law, and (iii) no exceptions may be made for any purchase or procurement requiring approval by the Executive Committee of the Board or by the Board of Directors.

VII. EXHIBITS

Purchase Requisition (Formstack Forms A & B)
Purchase Order (sample)
Conflict of Interest
Prior Approval Request Form – Other Individual Items
Sole Source / Emergency Procurement Authorization
Table of Authorities

CAREERSOURCE CENTRAL FLORIDA

Form A: Purchase Request for Micro Purchases

Purchases of up to \$3,500 (micro-purchase) may be awarded without soliciting competitive quotations if CSCF considers the price to be reasonable. To the extent practicable, the micro-purchases will be distributed equitably among qualified suppliers. If applicable, this Formstack is required. If your purchase exceeds \$3,500, please refer to “Form B: Purchase Request for Small Purchases”.

<https://cscfit.formstack.com/forms/forma>

Form B: Purchase Request for Small Purchases

Purchases greater than \$3,500 and up to \$150,000 are considered small-purchases, and may be awarded using “Form B: Purchase Request for Small Purchases.” If applicable, “Form B: Purchase Request for Small Purchases” is required. The below table provides the requirements for using this form in regards to applicable purchase thresholds.

<https://cscfit.formstack.com/forms/formb>

WORKFORCE CENTRAL FLORIDA

707 Mendham Blvd., Suite 250
Orlando, FL 32825
(407) 531-1222 Ext
Finance Department



12-EN-4773

REQUISITION

Vendor :GOVCONNECTION GOVCONNECTION, INC BOX 81018 WOBURN, MA 01813-1018	Ship-to-Address 707 Mendham Blvd., Suite 250 Orlando, FL 32825 (407) 531-1222 Ext Finance Department
Document Information Document Date 10/04/2012 Required Date 10/14/2012 Prepared By SEAN WORRELL Workflow ID PO - CEO Status Submitted to Accounting Description Renewal for Mendham Barracuda Webfilter Covers 10-7-2012 to 10-7-2013	Certification 3 Documents Quotes Benefit Required Need Renewal Terms 30 day terms

Comments : This PO is to renew WCF's current Barracuda's support for 410 Webfilter 410 appliances. These appliances provide safe web browsing for the Mendham and Osceola County Offices. This support agreement covers the units due to hardware failure and allows WCF to receive the latest updates from Barracuda. The selection of this vendor has been made based on price. The attachment contains Quotes Conflict of Interest form Debarment list clearance

Qty	Unit Type	Account Information	Item Number	Item Description	Unit Price	Total
1	EA	7365 003 12 0620 950 000000 90	N/A	Renewal for Mendham Barracuda Webfilter Covers 10-7-2012 to 10-7-2013	3,822.00	3,822.00

Total : \$3,822.00

Approval Information		
PAMELA NABORS	Document Approved	10/04/2012 1:01 PM
SEAN WORRELL	Submitted for Approval	10/04/2012 9:26 AM
KAMEEL ABDURRA	Document Approved	10/04/2012 9:02 AM
SEAN WORRELL	Submitted for Approval	10/04/2012 8:43 AM
SEAN WORRELL	Submitted for Approval	10/04/2012 8:42 AM

This Purchase Order Authorizes the purchase of the items or services in the quantities and the amounts specified above by the purchaser identified above on the presentation of proper identification at time of purchase.

The Purchase Order # must appear on billing invoices, packages.

Billing of the purchase must be submitted to the address shown above.

Workforce Central Florida is exempt from payment of State sales tax under Exemption # 85-8012538360C-9



Conflict of Interest Statement

Solicitation: _____

I acknowledge that I have been appointed to conduct reviews of proposals/bids received under the solicitation cited above. I have been briefed about my responsibilities relating to conflict of interest.

I attest that I do not have any conflict of interest with any proposers/bidders that have responded to this procurement. In addition, I know of no conflict of interest due to financial gain of any of my immediate family members. If during the course of reviewing the proposals/bids received in response to this solicitation, I become aware of an actual or possible conflict of interest, I will notify my immediate supervisor and the person managing this procurement and seek his/her advice on withdrawing from the review.

Finally, if anyone outside the official review chain seeks information about the procurement, I will not supply any information but will refer him/her to the person managing this procurement action.

Name

Signature

Title

Date

Department of Economic Opportunity (DEO)
Prior Approval Request Form – Other Individual Items

For the Equipment and other capital expenditure cost item, this prior approval request form must be used for any expenditure that meets the lesser of the capitalization threshold established by the requestor or \$5,000. It is also used for all other prior approval requests not authorized by the annual prior approval available for a specific period.

Request Date:

TO: DEO Grants Management Section

Requesting Entity:

Local Capitalization Threshold: \$

Prior Approval for: Cost Item(s) Administrative Requirement

Is this a request for retro-active approval? Yes No
If yes, enter action date:

Applicable OMB Circulars: Common Rule/OMB A-87 OMB A-110/A-122

DEO Use Only:

Approved Declined

Disposition Date:

Narrative Summary: *[Provide sufficient description and other information here for the specific prior approval requested to allow the Department to determine whether the request is necessary and reasonable for the program. For example, if you are requesting new equipment you would need to demonstrate the necessity of the addition, describe how you currently operate without the equipment, and explain how the addition of the equipment will enhance your productivity or reduce costs, an explanation of your cost/price analysis, etc.]*

Cost Summary: *[Where applicable, provide estimated cost amount here. Include line item detail of expenditure(s), if needed. If more room is needed, please attach additional information to this request form. \$*

Proposed Funding Source: *[Where applicable, provide estimated funding source/grant program here. Generally you should specify that the purchase will be charged to programs in accordance with your approved cost allocation plan.]*

Additional Information:

[Include any additional information, research or other comments you feel necessary for DEO to complete an analysis of this approval request. For example, if purchasing new equipment, please explain if any existing equipment will be traded or disposed and if any proceeds from sale of existing equipment will be utilized in the purchase.]

Certification Statement:

PLEASE NOTE THAT TRANSMISSION OF THIS REQUEST FORM TO DEO INDICATES YOUR ACKNOWLEDGEMENT OF APPLICABLE PURCHASING POLICIES AND/OR PROCUREMENT STANDARDS FROM THE OMB CIRCULARS OR OTHER PROGRAM GUIDELINES. TRANSMISSION OF THIS REQUEST FORM TO DEO ALSO INDICATES COMPLIANCE WITH THE ABOVE-MENTIONED STANDARDS.

NAME/TITLE OF PERSON COMPLETING FORM:

DATE SIGNED:

ADDITIONAL INFORMATION ATTACHED: YES ☐ NO ☐

DEO's granting of prior approval is given based on the limited facts presented as justification for the proposed expenditure. In the event that the actual expenditure is not in accordance with the facts presented or OMB requirements, the expenditure can still be questioned or disallowed. Factors affecting this include, but are not limited to:

- Inadequate documentation;
- Failure to follow internal, state, or federal policies;
- Expenditure is not necessary and reasonable or
- Failure to comply with applicable federal law or regulations.

Invoice Packet Cover Sheet

Tracking Number:	
Date Packet Provided:	
Contract or Purchase Order Provided:	
AWI Review Complete:	

General instructions:

- Complete the above table by providing the requested information.
- Include a copy of the contract, including the scope of work, budget forms, determination checklist, and any contract amendments. If a copy has been provided with a previous invoice packet, do not provide an additional copy.
- Attach all supporting documentation for the invoice, including submitted deliverables, receipts, etc.

Payment Due Date	
Procurement Source	
Vendor/Provider Name	
Vendor/Provider Invoice Number	
Funding Source	
Amount	
Justification	
Purpose of Payment	

CareerSource Central Florida

SOLE SOURCE / EMERGENCY PROCUREMENT AUTHORIZATION

Name and address of vendor / contractor to be used for sole source or emergency procurement:

Description of supplies and/or services required:

Justification for sole source or emergency procurement: *(For sole source procurement, clearly document both that the award/purchase is infeasible under small purchase procedures, sealed bid or competitive proposal and the vendor/contractor is the only source available for this type of services and/or supplies. Describe the actions taken to find another source. For emergency procurement, identify the physical emergency that threatens the safety or well-being of the agency or participants.)*

Prepared by:

Approved by:

Signature

Signature

Typed Name & Title

Typed Name & Title

Date

Date

TABLE OF AUTHORITIES

The Board reviews, approves, and establishes the authority levels for property and procurement processes and procedures. The authority levels are as follows:

Position	Check Signers*	Purchase Requisition/ Order	Issue RFP/RF Q	Approve Selection of Contractor	Sign Contract & Amendment
President/CEO	Authorized	\$150,000	\$150,000	\$150,000	Authorized
COO**	Authorized	\$150,000	\$150,000	\$150,000	Authorized
VP of Finance/Accounting	None	\$5,000	None	None	None
Department Directors	Authorized	\$5,000	None	None	None
Board Chair	Authorized	N/A	N/A	N/A	Inform
Board	None	N/A	N/A	Over \$150,000	Inform

* Checks of \$10,000 or more require two original signatures. For checks of \$100,000 or more, one of the original signatures must be by the Board Chair. A signature from the Board Chair is not required for recurring monthly employee benefits disbursements, participant individual training accounts (ITA), and participant work experience expenditures.

** Approval authorities are based on "as designee" by the President/CEO.

Note: Approval authorities are up to the amounts listed in the table (i.e., amounts less than).

ATTACHMENT F

DRAFT



POLICY TITLE: Occupational Skills Training Policy

POLICY NUMBER: WIOA 08

Author: Joyce Summersett, Education Liaison	Effective Date: 4/29/2014	Revision Date: 12/21/2017
Description of Revision(s):	Update the training Cap	
Approval:	Mimi Coenen, Chief Operations Officer	
Signature:		

I. PURPOSE:

To provide guidance on issuing Individual Training Account's (ITA) for training to customers who qualify under the Workforce Innovation and Opportunity Act (WIOA).

II. APPLICATION:

This document applies to all staff who are responsible for the supervision and issuance of ITA's, and case management of individuals in occupational skills training.

III. BACKGROUND:

The Workforce Innovation and Opportunity Act was signed into law on July 22, 2014 and is designed to help career seekers access employment, education, training, and support services to succeed in the labor market, and to match employers with the skilled workers they need for a competitive economy. The law authorizes career services for youth, adults, and dislocated workers in three categories: basic career services, individualized career services and follow-up services. These services can be provided in any order; with no pre-determined sequence of activities.

Occupational skills training is an organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate, or advanced levels. Training services, when determined appropriate, must be provided through an ITA. Occupational skills training should maximize customer choice, be linked to in-demand occupations, provide program performance of eligible training providers and coordinate to the extent possible with other sources of assistance. CareerSource Central Florida (CSCF) gives priority to training programs that lead to recognized post-secondary credentials that align with CSCF's in-demand industry sectors or occupations.

IV. DEFINITIONS:

1. **G.I. Bill** – Any Department of Veterans Affairs education benefit earned by members of Active Duty, Selected Reserve and National Guard Armed Forces and their families. The benefit is designed to help service members and eligible veterans cover education and training costs.
2. **High growth industries** -
 - An industry sector that has a substantial current or potential impact (including through jobs that lead to economic self-sufficiency and opportunities for advancement) on the state, regional, or local economy, as appropriate, and that contributes to the growth or stability of other supporting businesses, or the growth of other industry sectors; or
 - An occupation that currently has or is projected to have a number of positions (including positions that lead to economic self-sufficiency and opportunities for advancement) in an industry sector so as to have a significant impact on the state, regional, or local economy, as appropriate.
3. **Individual Training Account (ITA)** – An ITA is a voucher that covers training costs such as tuition, fees, books, required supplies, etc.
4. **PELL Grant** – Direct needs-based grants awarded through participating institutions to low-income students with financial need who have not received their first bachelor's degree or who are enrolled in certain post baccalaureate programs that lead to teacher certification or licensure. Unlike a loan, a PELL grant does not have to be repaid.
5. **Regional Targeted Occupational List (RTOL)** - An annual list of occupations identified as in-demand by the Department of Economic Opportunity, Labor Market Statistics for regional workforce areas.
6. **Registered apprenticeship:** Apprenticeships combine classroom studies with extensive on-the-job training under the supervision of a journey-level craft person or trade professional. Employers, groups of employers and joint labor-management groups design organize, manage and finance these programs in compliance with the National Apprenticeship Act. The Registered Apprenticeship provider serves as the course instructor using hands-on training supported by formal classroom training.

IV. REFERENCES:

1. CareerSource Central Florida Strategic and Operating Plan, 2012-2016
2. Title I of the Workforce Innovation and Opportunity Act (WIOA) Section 134(d)
3. TEGL 03-15: Guidance on Services Provided Through the Workforce Innovation and Opportunity Act (WIOA) Adult, Dislocated Worker, and Wagner-Peyser Programs
4. TEGL 13-16: Guidance on Registered Apprenticeship Provisions and Opportunities in the Workforce Innovation and Opportunity Act (WIOA)

V. POLICY

Occupational skills training for qualified WIOA programs participants will be administered by CSCF through the use of an Individual Training Account (ITA). Training services provided by eligible training providers or those established through a competitive procurement process are designed to assist individuals in obtaining employment in targeted occupations.

Registered Apprenticeship sponsors use ITA funds to support the related educational instruction component of the registered apprenticeship for eligible apprentices. ITA's will also finance pre-apprenticeship training in preparation for registered apprenticeships if they are on the Eligible Training Provider List (ETPL).

Participants must select their training institution and program from CareerSource Central Florida's approved Eligible Training Provider List which is updated twice a year (June, January).

It is CSCF's policy to limit funding to training programs that are no more than two years in duration, and to those programs that support the region's high growth industries. ITA funding will not pay for full bachelors, masters or doctorate degrees; however, for those individual currently enrolled in a bachelor's degree program and are on the approved programs list CSCF will pay for a maximum of 30 credit hours of training. Funding for education and training beyond the baccalaureate level is limited to licensure or exam fees necessary to retain or enter into an occupation.

A. ITA Cost

CareerSource Central Florida (CSCF) will support up to \$5,000 for high skill/high wage occupations. Occupations must be in demand and on the regional targeted occupation list (RTOL). The amount issued to the career seeker will be determined by CareerSource Central Florida upon evaluating all financial awards and program costs to the individual. This ITA amount is subject to change at the sole discretion of CareerSource Central Florida. Occupational skills ITA funding amounts are for direct customer costs: tuition, books and training fees. The maximum amount does not include supportive services that may be considered to ensure successful participation in training. CareerSource Central Florida ITA can only pay for required training –related items that are for ITA approved training programs. Customers enrolled in non-approved training programs cannot receive assistance for required training-related costs. Under Chapter 445, F.S., CSCF is required to direct at least 50 percent of its WIOA funds for training services.

B. Coordinating ITAs with Federal Education Assistance Programs (CFR680.230):

WIOA§134(d)(4)(B) stipulates that training is limited to individuals who are unable to obtain other grant assistance (including Pell Grants) or require assistance beyond the grants. Federal rules require program operators to “coordinate” training costs, which would allow the application of WIOA funds to “tuition books and fees” and Pell Grants to any remaining costs of attendance. [20 CFR s. 663.320]

WIOA funds are intended to provide training services in instances when there is no grant assistance, or there is insufficient assistance from other sources such as, but not limited to: Temporary Assistance for Needy Families (TANF); Food Assistance Employment and Training (FAE&T); Title IV Programs such as Federal Pell Grants, Academic Competitiveness Grants, National SMART Grants, Federal Supplemental Educational Opportunity Grants, or Federal Work-Study; GI Bill or other Federal financial aid available to military veterans. CSCF staff must consider and document in the participant file the availability of other sources of grants, excluding loans, to pay for training costs so that WIOA funds are used to supplement other sources. The use of WIOA funds to make payments towards a personal loan of an otherwise eligible participant is prohibited.

Individuals may select training that costs more than the maximum amount available for ITAs when other sources of funds (e.g., Pell Grants, scholarships, savings, etc.) are available to supplement the ITA.

VI. INQUIRIES:

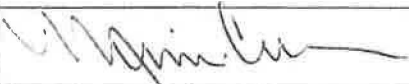
Questions regarding this policy should be directed to the Director of Policy Planning. Any updates to this policy will be communicated through the Chief of Operations Officer or his/her designee and noted on page one of the policy.

ATTACHMENT G

DRAFT



POLICY TITLE: WIOA Youth- Eligibility and Enrollment
POLICY NUMBER: WIOA 04

Author: Vicki Pesonen, Planning and Policy Liaison	Effective Date: 1/1/2017	Revision Date:
Description of Revision(s):		
Approval:	Mimi Coenen, Chief Operations Officer	
Signature:		

I. **PURPOSE:**

It is the purpose of this policy is to guide staff in determination of youth program eligibility under the Workforce Innovation Opportunity Act (WIOA).

II. **APPLICATION:**

This policy applies to all staff responsible for youth eligibility/enrollment and case management.

III. **BACKGROUND:**

The Workforce Innovation and Opportunity Act (WIOA) was signed into law on July 22, 2014 and is designed to provide employment and training services for eligible youth to assist with increasing educational levels, employment skills and occupational skills which will lead the youth and young adult to self-sufficiency. WIOA youth serves two categories of youth; they are *In-School* and *Out-of-School* (at the time of enrollment).

A significant change under WIOA shifts the primary program focus of Title I youth formula programs to support the educational and career success of Out-of-School youth (OSY). A minimum of 75 percent of WIOA youth funds is required to be spent on OSY. The 75 percent expenditure rate is a minimum requirement; therefore, states and local areas may spend up to 100 percent of their local area funds on OSY if they choose.

IV. **DEFINITIONS:**

In-School Youth (ISY): An individual who is age 14-21 and attending school (secondary, post-secondary or alternative school) at the time of enrollment.

Out-Of-School Youth (OSY): An individual who is age 16-24 and meets one of the following: (1) a school dropout, (2) A youth who is within the age of compulsory school attendance, but has not attended school for at least the most

recent complete school year calendar quarter, (3) A recipient of a secondary school diploma or its recognized equivalent. Note: WIOA clearly defines youth enrolled in an adult education program (i.e. GED) as out-of-school.

Family: Two or more persons related by blood, marriage, or decree of court, who are living in a single residence, and are included in one or more of the following categories:

- A husband, wife or spouses, and dependent children; or
- A parent or guardian and dependent children; or
- A husband and wife or spouses.

Note: Members who reside in the home but do not fit into one of the criteria above for the purpose of WIOA eligibility would not be considered a part of the family composition.

V. REFERENCES:

1. 20 CFR §681.681–§681-300
2. 20 CFR §681.460
3. WIOA §129
4. TEGL 26-13
5. DEO Memorandum 2/12/16
6. TEGL 23-14

VI. POLICY:

Eligibility:

To qualify for the youth program, the applicant must be determined eligible as an In-School or Out-of-School youth and provide required eligibility documentation. All documentation for proof of eligibility must be obtained prior to the registration of the youth.

All youth must meet the general *eligibility requirements* noted below:

- Youth must meet the age requirement at the time of enrollment
 - ISY 14-21
 - OSY16-24
 - youth 18-24 years old at the time of enrollment, may be served as youth, adults or both)
- Youth must be a United States citizen or authorized to work in the US.
- Meet Selective Service requirement (Males, 18 or older, born on or after January 1, 1960)

Youth Low-Income Eligibility: (see Attachment A)

In-school youth:

- Determined low income as indicated by:
 - Public assistance or food stamp recipient
 - Foster child
 - Homeless

- Annual income calculation – See Attachment B for the Lower Living Standard Income Level (LLSIL) Guidelines for PY 16-17
- Receiving or eligible to receive free or reduced lunch
and
- Meets one or more of the following barriers:
 1. **Basic Skills Deficient:** An individual who has a TABE score in Reading or Math below the 9th grade level (9.0).
 2. **Dropout:** an individual who is no longer attending any school and who has not received a secondary school diploma or its recognized equivalent.
 3. **Foster/ Runaway:** A youth on behalf of whom state or local government payments are made; and for whom a court order removing the youth from the custody of the parent(s) and specifying a managing conservator exists or A youth under 18 years of age that absents him/herself from home or place of legal residence without the permission of parents or legal guardian.
 4. **Homeless:** An individual who lacks a fixed, regular, adequate nighttime residence; and any adult or youth who has a primary nighttime residence that is a public or private operated shelter for temporary accommodation; an institution providing temporary accommodation; an institution providing temporary residence or a public or private place not designated for or ordinarily used as a regular sleeping accommodation for human beings
 5. **Offender:** An individual who has been subject to any stage of the criminal justice process for whom services may be beneficial or who requires assistance in overcoming artificial barriers to employment resulting from a record of arrest or conviction.
 6. **Pregnant or Parenting:** A *pregnant* youth is any female, 24 years of age or younger, who is pregnant. A *parenting* youth is a female or male, 24 years of age or younger, that is providing custodial care for one or more dependents under age 18.
 7. **Requires additional assistance** to complete an educational program or to secure and hold employment includes any student who has difficulty functioning in the regular school program and therefore has a high probability of not succeeding. The Regional Workforce Board (RWB) Barriers for CareerSource Central Florida are defined as:
 - Youth who are or a family member considered to be a Migrant Seasonal Farmworker
 - Youth who lacks work experience
 - Youth who lacks transportation

- Emancipated Youth

Out of School Youth:

No income documentation is required for Out-of-School youth if the following conditions are met:

1. **High school dropout** (without HS diploma or GED)
2. **Within the age of compulsory school attendance** – has not attended school for at least the most recent complete school year calendar quarter.
3. **Received a high school diploma or GED** and meets one or more of the following barriers:
 - Individual with a disability
 - Foster/Aged out or out of home placement
 - Homeless
 - Offender
 - Pregnant or Parenting Youth

If the youth is a high school graduate or obtained a GED, the following is required:

- Determined low income as indicated by:
 - Public assistance or food stamp recipient
 - Foster child
 - Homeless
 - Annual income calculation
- and
- Meets one or more of the following barriers:
 1. **Basic Skills Deficient:** An individual who has a TABE score in Reading or Math below the 9th grade level (9.0).
 2. **English Language Learner**
 3. **Requires additional assistance** to complete an educational program or to secure and hold employment includes any student who has difficulty functioning in the regular school program and therefore has a high probability of not succeeding. The Regional Workforce Board (RWB) Barriers for CareerSource Central Florida are defined as:
 - Youth or a family member who is considered to be a migrant seasonal farmworker
 - Youth who lacks work experience
 - Youth who lacks transportation
 - Court sanctioned emancipated youth

High Poverty Area: (DEO defined)

All youth (ISY, OSY) who are living in a high poverty area are considered low income and therefore, no income documentation is required. The Department of

Economic Opportunity (DEO) has released a Poverty Rate Map to identify the high poverty areas in Florida.

Adult Children Living at Home with their Parents:

An unmarried youth, including the youth's siblings, who are living with their parent(s) must meet all four of the requirements below to be considered a member of the parent's family. If they satisfy all four criteria, the income of the entire family would need to be considered when determining if the individual meets the definition of low income.

- Relationship- The child, step child, or foster child, must meet the definition of a WIOA family.
- Residence- The child must have the same principal residence of the parent for more than half the year. Note: Students under the age of 24, who reside at school, would be considered to have the same principal residence as their parents.
- Age- the child must under the age of 19 if they are not in school, or under the age of 24 if they are a fulltime student
- Support- The child did not provide more than one-half of his/her own support for the year.

Five Percent Exception:

WIOA allows a low-income exception where five percent of WIOA youth may be participants who ordinarily would be required to be low-income for eligibility purposes and meet all other eligibility criteria for WIOA youth except the low-income criteria.

Note: All requests for the five percent exception must be approved by the Youth Services Manager.

Youth File Documentation:

Files will contain the following:

- WIOA Application
- Proof of Social Security Number
- Proof of Residence
- Proof of Date of Birth
- Proof of US Citizenship or authorization to work in the US
- Proof of Selective Service Registration (if applicable)
- Proof of Employment status
- Proof of Education status
- Proof of Barriers (if applicable)
- Proof of Family size (if applicable)
- Proof of Income (if applicable)
Note: Calculation of income form must be completed including supporting documentation
- Consent for Release of Confidential Information

- Customer Complaint/Grievance Procedures
- Authorization and Release for Media
- CSCF Incentive Policy
- TABE Test

TABE (Test of Adult Basic Education) – ALL YOUTH:

The TABE test is a requirement of all youth interested in pursuing WIOA services. The TABE test provides a grade equivalency for Reading, Math and Language. Youth who score 8.9 or below are considered to be basic skills deficient (BSD) and those with scores of 9.0 or greater are considered to be Basic Skills Sufficient in any given area.

There are four TABE test levels, "L" (Limited Literacy), "E" (Easy), "M" (Medium), "D" (Difficult) and "A" (Advanced). **Region 12 is currently utilizing the "D" level TABE test, versions 9 & 10.**

Note: All youth will be pre-tested prior to the date of registration. Staff may accept a copy of a TABE test, level D or A, from the youth if it has been completed no more than 6 months prior to the date of registration.

Program Elements:

WIOA law requires that 14 program elements be made available to all youth who are served by the youth program. "Make available" does not mean that every youth must receive services from all program elements; it means that youth have access to these services if they require them to meet their goals. These services may be provided directly or through a referral. All youth must receive at least one of the following services:

- (1) Tutoring, study skills training, instruction and evidence-based dropout prevention and recovery strategies that lead to completion of the requirements for a secondary school diploma or its recognized equivalent (including a recognized certificate of attendance or similar document for individuals with disabilities) or for a recognized postsecondary credential;
- (2) Alternative secondary school services, or dropout recovery services, as appropriate;
- (3) Paid and unpaid work experiences that have academic and occupational education as a component of the work experience, which may include the following types of work experiences:
 - (i) Summer employment opportunities and other employment opportunities available throughout the school year;
 - (ii) Pre-apprenticeship programs;
 - (iii) Internships and job shadowing; and
 - (iv) On-the-job training opportunities;

(4) Occupational skill training, which includes priority consideration for training programs that lead to recognized postsecondary credentials that align with in-demand industry sectors or occupations in the local area involved, if the Local WDB determines that the programs meet the quality criteria described in WIOA sec. 123;

(5) Education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster;

(6) Leadership development opportunities, including community service and peer-centered activities encouraging responsibility and other positive social and civic behaviors;

(7) Supportive services, include transportation and other assistance that is necessary to enable an individual to participate in WIOA youth program activities.

(8) Adult mentoring for a duration of at least 12 months, that may occur both during and after program participation;

(9) Follow-up services for not less than 12 months after the completion of participation.

(10) Comprehensive guidance and counseling, which may include drug and alcohol abuse counseling, as well as referrals to counseling, as appropriate to the needs of the individual youth;

(11) Financial literacy education; including creating household budgets, initiate savings plans, retirement, home ownership, wealth building, credit scores and credit reports, education and others.

(12) Entrepreneurial skills training; exploration of starting a business, developing business plans, exploring their passion and transferring it to business, enhancing their people skills, etc.

(13) Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services; and

(14) Activities that help youth prepare for and transition to postsecondary education and training.

Application/Enrollment:

Once a youth is determined eligible, and all documentation has been collected, an Employ Florida Marketplace (EFM) application will be entered, and according to the youth's goals, the applicable activities will be assigned.

NOTE: No support services may be provided to a youth prior to determining eligibility, entering the application, participation and appropriate activities in EFM.

VII. ATTACHMENTS/REFERENCES

Attachment A: Youth Low-Income Eligibility Guide

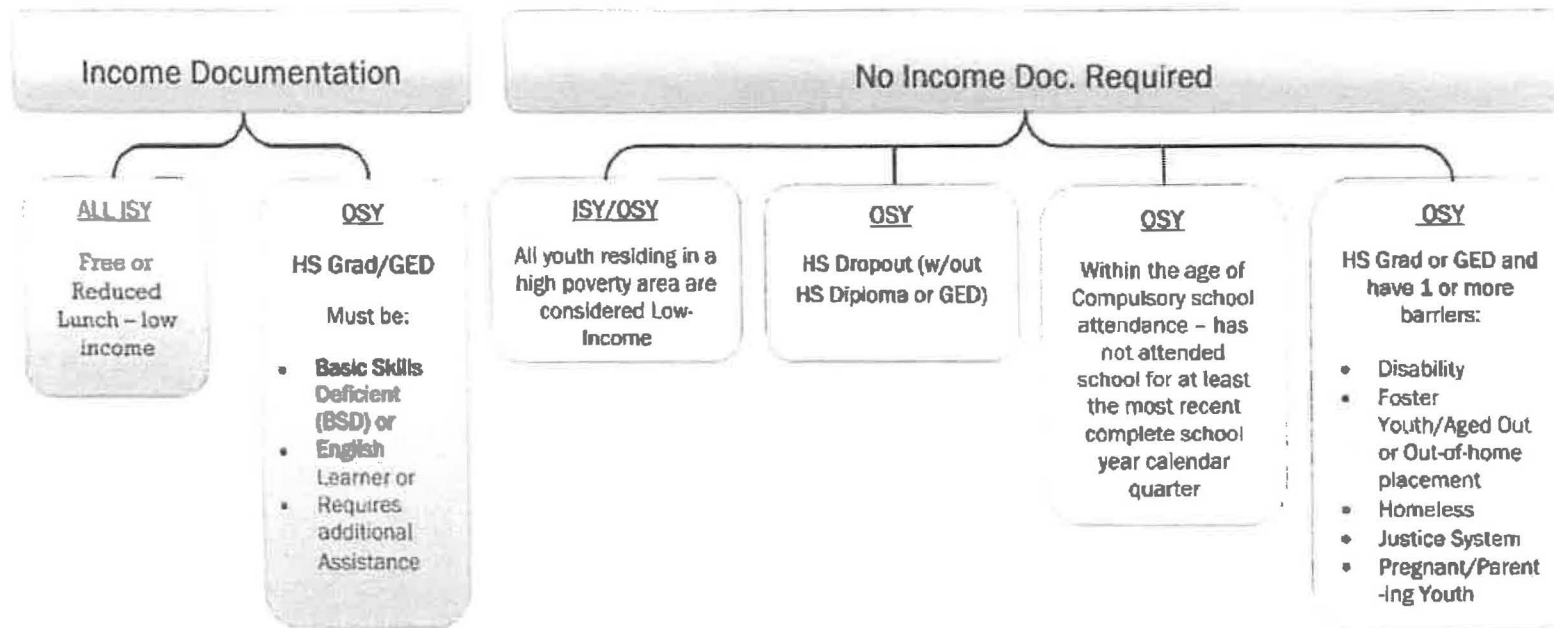
Attachment B: PY 16-17 Lower Living Standard Income Level Guidelines

VIII. INQUIRIES

Questions regarding this policy should be directed to the Director of Planning and Policy. Any updates to this policy will be communicated through the Chief Operations Officer or their designee and noted on the policy.

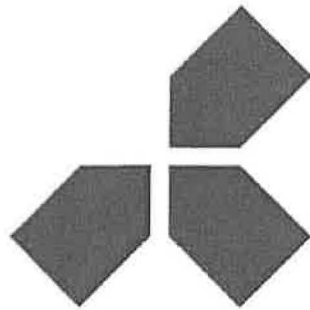
YOUTH LOW-INCOME ELIGIBILITY

Low income is not a requirement to meet eligibility for most categories of OSY under WIOA



Attachment A

Attachment B
Lower Living Standard Income Level and Poverty Guideline for PY 16-17



CareerSource
CENTRAL FLORIDA

***LOWER LIVING STANDARD INCOME LEVEL
AND POVERTY GUIDELINES FOR PY 16-17***

ACTION REQUIRED

These guidelines should be used in determining if an individual meets the definition of low income. They are based on the 70% Metro LLSIL.

FAMILY UNIT SIZE	Annual Income
1	12,060
2	16,240
3	20,420
4	25,062
5	29,579
6	34,595
7	39,611
8	44,627
For each additional person in a family above eight, add \$5,016 per person.	