

CareerSource Research Coast

CareerSource Research Coast LWDA 20

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Date Submitted: March 29, 2018

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These guidelines provide direction for local plans submitted under the Workforce Innovation and Opportunity Act (WIOA). 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 official. Regulations require states and LWDBs to regularly revisit and recalibrate state plan strategies in response to changing economic conditions and workforce needs of the state (20 CFR, Unified and Combined Plans Under Title I of the Workforce Innovation and Opportunity Act, §676.135).

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

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

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

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

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

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

PROCESS FOR PLAN SUBMITTAL

CareerSource Florida, Inc., established a form entitled “WIOA Local Plan Submission Form.” The form will be used to submit the two-year modification of the local plan, required attachments, and contact information for primary and secondary points of contact for each LWDB. All two-year modifications for local plans must be submitted no later than 5:00 p.m. (EST) on Thursday, March 29, 2018.

Prior to plan submission, please ensure:

- The local board reviewed and approved the plan;
- The board chair and the chief elected official signed the appropriate document, with an original submitted to CareerSource Florida by mail to *WIOA Plans c/o Warren Davis, Policy Analyst, 2308 Killlearn Center Blvd. Suite 101, Tallahassee, FL 32317*. Please also send a scanned copy to FloridaWIOA@careersourceflorida.com. This email address can also be used to submit any questions pertaining to the two-year modification process;
- The structure and numbering follows the plan instructions format (beginning with Section I of these instructions);
- The plan is one continuous and searchable PDF document including all attachments;
- Responses to all questions are informative and concise;
- The name of the local area, the page number and plan submission date are listed in the footer of the document;
- A table of contents with page numbers is included and each page of the plan is numbered; and,
- Text is typed with a font size of 11 or greater.

Please email FloridaWIOA@careersourceflorida.com and confirm plan submission. This begins the plan’s official review by the Department of Economic Opportunity (DEO). Upon submission, all plans are reviewed for completeness and adherence to plan formatting requirements. If there are questions or concerns local boards are notified. The content of plans is reviewed by both DEO and CSF staff with a recommendation for approval or disapproval provided to the CSF Board of Directors at its meeting scheduled for May 16, 2018.

A recommendation for approval is made unless the staff review indicates: (1) there are deficiencies in local workforce investment activities that are not addressed, or (2) the plan is inconsistent with WIOA and its regulations, including required public comment provisions. It is recognized that this two-year modification will include strategies and activities that are fully completed, as well as some that are still being developed and implemented.

KEY DATES

| | |
|--|------------------------|
| Local Plan Guidelines Issued | January 3, 2018 |
| WIOA Statewide Unified Plan Two-Year Modification Due | March 29, 2018 |
| Local Plans Due | March 29, 2018 |
| Local Plans Approved | May 16, 2018 |
| WIOA Program Year 2018 Begins | July 1, 2018 |

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

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

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

1. Chief Elected Official(s) (CEO)
 - a. **Identify the chief elected official(s) by name, title, mailing address, phone number and email address.**

Treasure Coast Workforce Consortium

Chairman

Frannie Hutchinson, Commissioner
St. Lucie County Board of County Commissioners
2300 Virginia Avenue
Fort Pierce, Florida 34982
(772) 226-1442
hutchinsonfc@stlucieco.org

Vice - Chairman

Doug Smith, Commissioner
Martin County Board of County Commissioners
2401 SE Monterey Road
Stuart, Florida 34996
(772) 228-5421
dsmith@martin.fl.us

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

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

Attachment A – Inter-local Agreement Among Indian River, Martin, and St. Lucie Counties Establishing the Treasure Coast Workforce Consortium and the Workforce Development Board of the Treasure Coast.

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

Attachment B – Bylaws of the Workforce Development Board of the Treasure Coast, LWDB 20.

d. Describe the by-laws established by the CEO to address 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 local board members;

The Chairperson, Vice Chairperson and Treasurer shall be elected annually by the membership and shall serve a one-year term commencing July 1. The membership of the Local Workforce Development Board (LWDB 20) is appointed by the Treasure Coast Workforce Consortium in accordance with Section 107 of Title 1 of the WIOA.

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

The Chairperson and the Vice-Chairperson's terms shall be limited to two (2) terms and the Treasurer shall be limited to four (4) terms. The terms of the officers are limited to two (2) terms consecutively in the same role. There are no limitations on the number of terms not in sequence or in different roles. Board members shall be appointed for fixed and staggered terms and may serve until their successors are appointed. After the initial staggered terms, terms of Board members shall be three years. Term appointments are staggered based upon original/initial term appointment to the Board of Directors by the TC Consortium. At the end of each program year, the Board member roster is reviewed and those members, in good standing and whose current 3 year term is set to expire, are brought to the June TC Consortium meeting for review, approval and renewal of another 3 year term.

iii. The process to notify the CEO of a Board member vacancy ensuring a prompt nominee;

Board members are required to submit notice to CSRC President/CEO, who serves that the LWDB 20 Board of Directors Secretary, his/her official resignation from the LWDB 20 Board of Directors. The LWDB 20 Board of Directors forms an Ad-Hoc search committee for finding potential membership replacements that are provided to the Consortium. These recommendations are submitted by the LWDB 20 Board of Directors to the Consortium for review. Vacancies in the LWDB 20 Board of Directors shall be filled by appointment by the Consortium.

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

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

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

LWDB 20 utilizes web and video-based online technology to provide video/teleconferencing options for all Committee, Board and Consortium meetings. This technology allows for screen sharing, web camera participation and active discussion via telephone and/or computer, telephone combination.

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

The composition of the private business members of the LWDB 20 Board of Directors reflects the industries/sectors in demand for our Local Workforce Development Area (LWDA). Private business Board members represent healthcare, manufacturing, construction trades, logistics, apprenticeships, financial services, retail, research, staffing services and information technology. These above mentioned members are affiliated with industry associations and attend a wide variety of meetings throughout our LWDA where they provide information about the programs and services CSRC can provide to their businesses.

Private business members also take a lead role in all LWDB 20 committees. These committees include: Executive, Programs and Services and the Youth Council. The Board Chairperson and each Chairperson for the above referenced committees are private business employers. Agenda items for committee and full Board of Directors meetings are structured under categories of our strategic plan and require input and feedback from Board members.

Executive Committee members attend workforce related meetings and conferences with CSRC staff, such as the CareerSource Florida, Board of Directors and committee meetings, the National Association of Workforce Boards (NAWB) Conference and the annual Workforce Professionals Summit. Other Board members are invited to attend other state and national conferences with CSRC staff that pertain to their subject matter expertise. A recent example is the Youth Council Chairperson attended the NAWDP Youth Symposium with CSRC WIOA Youth program coordinator. Board members

are also called upon to assist CSRC staff in addressing community issues as they are presented to CSRC. These Board members attend community meetings with CSRC staff to address issues, broker relationships and provide support. Many times these issues result in “special projects” where the Board member involved becomes the lead voice in promotion of the service delivery.

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

N/A

e. Provide a description of how the CEO is involved in the development, review and approval of the local plan and its two-year modification.

The President/CEO, in collaboration with staff, developed the plan through multiple workgroup meetings and teleconferences. Additionally, the President/CEO met and discussed coordinated efforts with named partner organizations within the plan. The President/CEO, along with Executive Leadership, was responsible for moving the plan through Committee for final Board of Directors and Consortium approval.

2. Local Workforce Development Board (LWDB)

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

Robert Cenk, Vice President
Homecrete Homes, Inc.
2162 NW Reserve Park Trace
Port St. Lucie, FL 34986
Tel: 772-467-6160
bcenk@homecretehomes.com

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

Pamela Burchell, President
Burchell Consulting
10813 SW Visconti Way
Port St. Lucie, FL 34986
Tel: 772-708-7776
pamela.burchell@aol.com

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

To ensure the comment and input into the development and review of the local plan, the plan updated by CSRC staff was reviewed by the Youth Council, the Programs and Services and the Executive Committees of LWDB 20 in open, public meetings. Their comments and responses were reviewed and integrated into the plan. The 2-Year plan modification was advertised to the public through the LWDA's news affiliates and placed on the CSRC website on February 28, 2018. Local elected officials, all Board members, and members of the LWDA's economic development organizations, labor organizations, local education providers, core program partners and mandatory one-stop partners were notified of access to the plan and provided the opportunity to offer input into the plan. Emphasis on the implementation of WIOA and Comprehensive One-Stop Career Centers was taken with the core/mandatory partners. Comments and suggestions from Board members, members of the above mentioned organizations and the general public will be reviewed and integrated into the plan, as appropriate. The plan was reviewed at the Board of Directors meeting held on March 28, 2018.

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

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

The LWDB 20-CSRC serves as the fiscal agent in LWDA.

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

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

The LWDB 20-CSRC serves as the administrative entity in LWDA.

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

- 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.**

CSRC serves as the local fiscal agent and administrative entity for LWDB 20. CSRC was designated as the Direct Provider of Workforce Services on January 1, 2009 and has been granted extensions to this designation through June 30, 2020. The appropriate firewalls established by the LWDB 20 Board of Directors to guard against any conflict of interest are described in detail in the CSRC Administrative Plan. The established firewalls have been validated through the most recent, 2017 – 2018, Internal Control Questionnaire, independent monitoring performed by Taylor, Hall, Miller and Parker, PA and Department of Economic Opportunity (DEO) annual monitoring for both fiscal operations and programs.

The One-Stop Operator role is no longer a function of CSRC. Effective July 1, 2017, CSRC entered into a subrecipient agreement with a consulting firm to act as the One-Stop Operator role through a formal competitive procurement process.

Attachment C - CSRC Administrative Plan

Attachment D – Subrecipient Agreement for the One-Stop Operator

4. One-Stop System

- 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).**

CSRC operates four full-service locations which provide Wagner Peyser, WIOA Adult and Dislocated Worker, Trade Adjustment Assistance (TAA), Migrant Seasonal Farmworker (MSFW), Veterans Services, Welfare Transition (WT) programs and Supplemental Nutrition Assistance Program (SNAP). CSRC Career Centers are situated at key locations in each of the counties in the LWDA, with the largest and most central location designated as the comprehensive center:

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

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

St. Lucie County Career Center (Comprehensive Career Center)

584 University Blvd
Suite 300
Port St. Lucie, FL 34986

Martin County Career Center

710 SE Central Parkway
Stuart, FL 34994

CSRC also offers Wagner Peyser core services aboard two mobile units which operate in Indian River and Martin counties. Each mobile unit is furnished with all of the equipment housed in a Career Center resource room and is, essentially, a Career Center on wheels. The mobile units operate on a standard schedule in both counties and is also deployed to different sites in the community based on need.

WIOA Youth services, known as CSRC Youth Connections, are provided by a competitively procured, sub-recipient service provider, Eckerd Connects. WIOA Youth services are provided at alternative locations to better meet the needs of youth program participants. CSRC offers four (4) sites for Youth Connections.

The Vero Beach site, serving Indian River County, is co-located in the Economic Opportunities Council building, which also houses many other community-based programs. It is centrally located in the City of Vero Beach and is also easily accessible by public transportation routes.

CSRC Youth Connections

2455 St. Lucie Avenue
Vero Beach, Florida 32961

The Stuart site, located in Martin County, is located in a community center, and occupied by three (3) other non-profit organizations serving community youth. It is also within walking distance to the local adult education center, county bus stops and two (2) homeless shelter facilities.

CSRC Youth Connections

724 East 10th Street
Stuart, Florida 34994

The Port St. Lucie site, located in west St. Lucie County, is next door to the St. Lucie Career Center, but has a separate entrance and area to provide privacy and confidentiality to youth participants.

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

The Fort Pierce site, located in east St. Lucie County, is a cohort within a St. Lucie County school district building that houses many other community-based programs and is next door to the Garden City Career Center, but with a separate entrance and area to provide privacy and confidentiality for youth participants. This site is centrally located in a high-poverty area and within close proximity to public transportation routes.

CSRC Youth Connections
2102 Avenue Q, Room 14
Fort Pierce, Florida 34950

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

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

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

Mobile Units are available in Indian River and Martin counties and schedules and locations vary based upon community need. Schedules are updated and provided via the CSRC website, www.careersourcerc.com

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

Career and Technical Consultants, L.L.C.
Kathie Schmidt, Owner
139 NE Pinelake Village Blvd.
Jensen Beach, FL 34957
(772) 528-0021
kathieschmidt@gmail.com

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

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

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

WIOA Youth services are provided by a contracted service provider:

Richard Semancik, Chief of Program Services - East
Eckerd Connects
100 N. Starcrest Drive
Clearwater, Florida 33765

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.

Wagner Peyser

CSRC serves as the provider for Wagner Peyser services to include, but not limited to: intake and assessment, work registration, assistance with re-employment benefits claims filing, job information, job development, assisted job search, job listings, job referrals, job placement, follow-up on job referrals, referrals to other services, information on all programs and services, workshops, labor market information, tax credit information, mass recruiting services, federal bonding services, employer marketing, and computer connectivity.

Basic career services are made available to all individuals seeking services through the one-stop delivery system. Once staff determines that individualized career services are appropriate for a career seeker to obtain or retain employment, services are made available to the career seeker at the Career Centers.

Individuals may also receive workforce preparation skills that help them acquire a combination of basic, academic skills, and other skills including competencies in utilizing resources, using information, working with others, and obtaining skills necessary for successful transition into and completion of postsecondary education, training or employment.

Comprehensive and specialized assessments of the skill levels and service needs are available to career seekers. These services may include diagnostic testing, use of other assessment tools and in-depth evaluation to identify employment barriers and appropriate employment goals.

Migrant Farmworker/Seasonal Farmworker Program (MSFW)

Career services are provided as appropriate to MSFW program participants. Staff assisted services are provided through outreach as well as in the Career Centers. As part of the registration and intake process in the Career Centers, career seekers are identified as MSFW and are provided with a verbal and written explanation of services available in English, Spanish, or Creole. Bilingual staff are available in each Career Center.

The MSFW outreach worker conducts outreach to farmworkers on a daily basis to explain the services available through the career center and other partner agencies. CSRC has a strong partnership with Indian River State College's (IRSC) Farmworker Career Development Program. The services offered include: availability of referrals to employment, training and supportive services; information on specific employment opportunities available, such as H2A jobs; a summary of farmworker rights; and information on the employment service complaint system.

Jobs for Veterans Program

CSRC ensures that all individuals identified as veterans receive veteran's priority of services at the point of entry when accessing any of our locations or community events. Veteran services are considered a Career Center responsibility and not just the domain of the Veterans Program staff. All CSRC Career Center staff are trained and tasked to identify and serve veterans, especially veterans with significant barriers to employment (SBE). Once front line staff identify an SBE veteran, they refer the veteran to a Disabled Veteran Outreach Program (DVOP) Specialist to receive enhanced services as per federal program guidelines.

Re-Employment Benefits Assistance

Each Career Center and mobile unit has a resource room that is equipped with computers for career seekers to use. Any individual interested in filing a claim may connect to the state's Re-Employment Assistance (RA) claims and benefits system to complete the online application and work registration process. Front line staff are also available to assist career seekers with general questions and to provide information about the programs and services available through our workforce system.

Welfare Transition (WT) Program

WT offers participants a variety of career services to include career exploration, counseling and planning, assistance in the development of an individual responsibility plan, referrals to job readiness workshops; referrals to other workforce and partner programs and services; community service/work experience activities to teach and/or

strengthen basic job skills; tuition assistance for GED, ESOL and approved courses of study; and job searching. WT also provides support services of child care, transportation assistance to include vehicle repair, and purchasing of required uniforms, tools and/or books.

Supplemental Nutrition Assistance (SNAP) Program

SNAP offers online education and remedial courses, job searching, community service/work experience activities, and referrals to job readiness workshops and other workforce and partner programs and services.

Workforce Innovation & Opportunity Act/Trade Adjustment Act (TAA)

Career Services

Career services for Adult/Dislocated Workers are composed of basic career services, individualized career services and follow-up services. The services can be provided in any order and there are no sequence requirements for these services.

Basic Career Services

Basic career services include, eligibility determination for the WIOA Adult/Dislocated Workers and Youth programs; outreach, intake (including identification through the state's Worker Profiling and Re-Employment Services system of unemployment insurance claimants likely to exhaust benefits), and orientation to information and other services available through the Career Centers; initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps) and supportive service needs; labor exchange services, including job search and placement assistance and when needed, by an individual, career counseling.

Individualized Career Services

If CSRC Career Center staff determines that individualized career services are appropriate and needed to obtain or retain employment, the following services are made available to all individuals in the Career Centers: Testing and other assessment tools to identify employment barriers and employment goals; referrals to partner programs for supportive services; career planning/case management; counseling; development of employment plan; information about the Regional Demand Occupations List (RDOL) and Eligible Training Provider List (ETPL) to include training provider scorecard and provision of labor market employment statistics.

Follow-up Services

Follow-up services are provided, as appropriate to individuals placed on unsubsidized employment for up to twelve (12) months after the first day of employment. Follow-up services can be in the form of counseling about the workplace, or additional services needed to retain employment.

Training Services

Training services are critical to the employment success of many Adult/Dislocated Workers and TAA career seekers. As with Career Services, there is no sequence of service requirements for training. Training services may be provided if the Career Center staff determine, after interview, evaluation, assessment and career planning that the individual is unlikely or unable to obtain or retain employment, that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment; is in need of training to obtain or retain employment that leads to economic self-sufficiency or to wages comparable to or higher than wages from previous employment; has the skills and qualifications to successfully participate in the selected program of training.

Workforce Innovation & Opportunity Act Youth Program

WIOA Youth services are contracted out through a formal Request for Proposal (RFP) process to a youth service provider. Currently, youth services are contracted through Eckerd Connects. WIOA Youth services include, but are not limited to, work-readiness training, occupational/vocational training opportunities, work-based learning opportunities, incentives, support services, GED/high school diploma attainment assistance, mentoring, job placement, and post-secondary education support.

Adult Basic Education

CSRC provides information and makes referrals to Indian River State College (IRSC) and the Indian River County School Board for Adult Basic Education services throughout the LWDA. A Memorandum of Understanding (MOU) is used to define these partnerships.

A MOU for the LWDA's Comprehensive One-Stop Career Center was developed between CSRC, the Workforce Consortium of the Treasure Coast and the Required Partners which became effective January 1, 2018. IRSC, as the required partner for Adult Basic Education at the Comprehensive One-Stop Career Center, will provide adult basic education and GED Prep courses onsite at the Comprehensive One-Stop Career Center. IRSC will also provide assistive technology and devices to enable individuals with various disabilities to benefit from the GED Program. Under this MOU, IRSC also agrees to become familiar with the array of services provided through the Comprehensive One-Stop Career Center, to participate in cross-training and to utilize technology whenever possible to enhance service delivery.

Senior Employment Services

CSRC provides information and makes referrals to AARP and Experience Works for senior employment services throughout the LWDA. A MOU is used to define these partnerships.

A MOU for the LWDA's Comprehensive One-Stop Career Center was developed between CSRC, the Workforce Consortium of the Treasure Coast and the Required Partners which became effective January 1, 2018. AARP Foundation Senior Community Service Employment Program, as the required partner at the Comprehensive One-Stop Career Center, is co-located onsite and will provide employment and training opportunities for eligible individuals age 55 and older. AARP will also provide one individual at the Comprehensive One-Stop Career Center to assist with answering calls and directing career seekers and customers to the appropriate resources.

Department of Vocational Rehabilitation

CSRC partners and makes referrals to the Florida Department of Vocational Rehabilitation (VR) for services to those with disabilities. In turn, VR makes referrals to CSRC. A formal referral system has been developed to track dual program enrollment in order to ensure career seekers receive the resources needed to become employed.

A MOU for the LWDA's Comprehensive One-Stop Career Center was developed between CSRC, the Workforce Consortium of the Treasure Coast and the Required Partners which became effective January 1, 2018. VR, as the required partner at the Comprehensive One-Stop Career Center, will be co-located onsite and will provide their programs and services for individuals who have physical or mental disabilities. Under this MOU, VR also agrees to become familiar with the array of services provided through the Comprehensive One-Stop Career Center, and to participate in cross-training.

Career and Technical Education

CSRC partners and makes referrals to IRSC's Career and Technical Education Program and the School District of Indian River County Technical Center for Career and Adult Education for their career and technical education programs that specialize in skilled trades, applied sciences, modern technologies and career preparation. In turn, these partners makes referral to CSRC. A MOU is used to define these partnerships.

A MOU for the LWDA's Comprehensive One-Stop Career Center was developed between CSRC, the Workforce Consortium of the Treasure Coast and the Required Partners which became effective January 1, 2018. IRSC, as the required partner (representing Career and Technical Education) at the Comprehensive One-Stop Career Center, will be co-located onsite and will provide their Office Administration program. Under this MOU, IRSC also agrees to become familiar with the array of services provided through the Comprehensive One-Stop Career Center, to participate in cross-training and to utilize technology whenever possible to enhance service delivery.

Community Services Block Grant

CSRC partners and makes referrals to the Community Services Block Grant (CSBG) entity in the LWDA. In turn, the CSBG makes referrals to CSRC. A formal referral system has been developed to track referrals to ensure career seekers receive the services they need to successfully seek and find self-sufficient employment.

A MOU for the LWDA's Comprehensive One-Stop Career Center was developed between CareerSource Research Coast, the Workforce Consortium of the Treasure Coast and the Required Partners which became effective January 1, 2018. The St. Lucie County CSBG, as a required partner at the Comprehensive One-Stop Career Center, will have a presence at the designated Career Center through Skype. Career seekers will have the ability to apply online, via Skype, for services including but not limited to: employment support services, identification cards, driver's license, transportation and for GED testing fees (based on limitations to budget). Under this MOU, CSBG also agrees to familiarize their staff with the basic eligibility and participation requirements, as well as with the available service and benefits offered, for each of the required partner programs. CSBG also agrees to participate in cross-training of staff located at the Comprehensive One-Stop Career Center.

Division of Blind Services

A MOU for LWDA's Comprehensive One-Stop Career Center was developed between CSRC, the Workforce Consortium of the Treasure Coast and the Required Partners which became effective January 1, 2018. The Division of Blind Services, as a required partner at the Comprehensive One-Stop Career Center, will provide a staff member at this Career Center on a scheduled basis to provide training and support services to those career seekers whose visual impairments significantly affect their ability to participate in daily activities. Under this MOU, the Division of Blind Services also agrees to become familiar with the array of services provided through the Comprehensive One-Stop Career Center, and to participate in cross-training.

YouthBuild

A MOU for LWDA's Comprehensive One-Stop Career Center was developed between CSRC, the Workforce Consortium of the Treasure Coast and the Required Partners which became effective January 1, 2018. IRSC, as the grant recipient of the YouthBuild grant, is a required partner at the Comprehensive One-Stop Career Center and will provide the following for the YouthBuild participants: free GED classes, paid work experience on a construction site, and classroom instruction designed to lead to credentials recognized in the construction industry.

- 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.**

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

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

ANALYSIS OF NEED AND AVAILABLE RESOURCES

1. **Please provide an analysis (or existing analysis pursuant to WIOA section 108(c)) of the regional economic conditions, which must include:**
 - a. **Information on existing and emerging in-demand industry sectors and occupations; and**
 - b. **The employment needs of employers in those industry sectors and occupations (WIOA §108(b) (1) (A)).**

Answers to item (1) (A & B) are defined below.

Port St. Lucie Metro

The majority of the nonagricultural employment in the CSRC LWDA was in the Port St. Lucie metro area. This metro area accounted for 147,900 jobs in December 2017, an increase of 1,300 jobs from December 2016 (+0.9 percent).

The manufacturing (+13.8 percent); education and health services (+5.3 percent); and trade, transportation, and utilities (+2.2 percent) industries grew faster in the metro area than the statewide over the year.

The industries gaining in jobs over the year were: education and health services (+1,400 jobs); manufacturing (+900 jobs); trade, transportation, and utilities (+700 jobs); mining, logging, and construction (+400 jobs); other services (+300 jobs); and financial activities (+100 jobs). The professional and business services (- 1,300 jobs); leisure and hospitality (- 600 jobs); government (- 500 jobs); and information (- 100 jobs) industries lost jobs over the year.

The Port St. Lucie MSA had the fastest annual job growth rate compared to all the metro areas in the state in manufacturing (+12.3 percent) in November 2017.

The Port St. Lucie MSA had the third fastest annual job growth rate compared to all the metro areas in the state in education and health services (+4.9 percent) in November 2017.

The Port St. Lucie MSA had the fastest annual job growth rate compared to all the metro areas in the state in manufacturing (+13.8 percent) in December 2017.

The Port St. Lucie MSA had the second fastest annual job growth rate compared to all the metro areas in the state in education and health services (+5.3 percent) in December 2017.

Sebastian- Vero Beach Metro Area

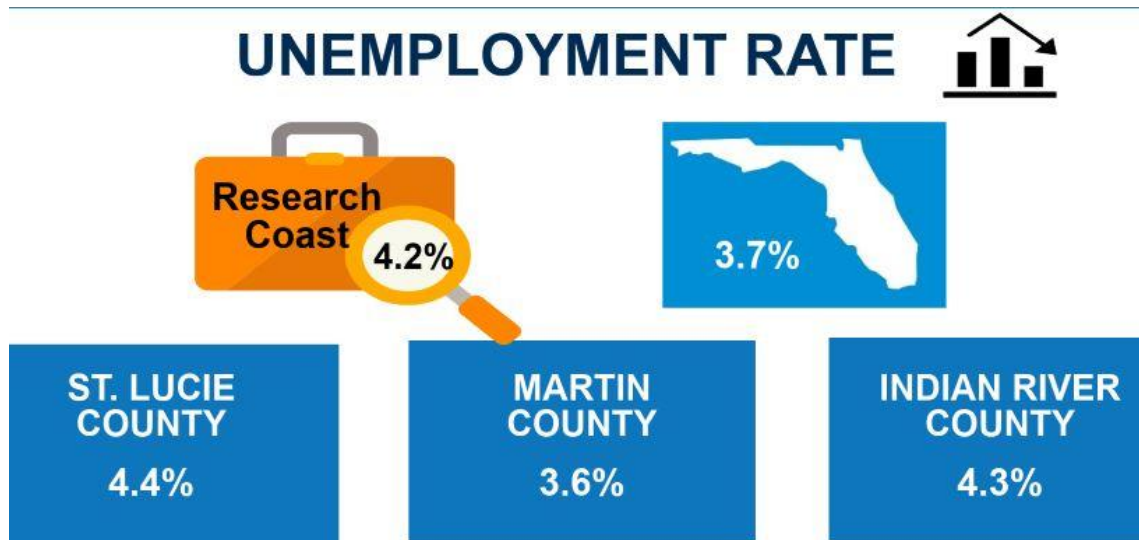
In December 2017 nonagricultural employment in the Sebastian- Vero Beach MSA was 53,300, an increase of 800 jobs (+1.5 percent) over the year.

The other services (+6.9 percent); financial activities (+3.7 percent); education and health services (+2.8 percent); and trade, transportation, and utilities (+1.9 percent) industries grew faster in the metro area than statewide over the year.

The industries gaining in jobs over the year were: education and health services (+300 jobs); trade, transportation, and utilities (+200 jobs); other services (+200 jobs); mining, logging, and construction (+100 jobs); financial activities (+100 jobs); and professional and business services (+100 jobs).

The information (- 100 jobs) and leisure and hospitality (- 100 jobs) industries lost jobs over the year. The manufacturing and government industries were unchanged over the year.

The Sebastian- Vero Beach MSA had the second fastest annual job growth rate compared to all the metro areas in the state in other services (+6.9 percent) in December 2017.



| Nonagricultural Employment by Industry (not seasonally adjusted) | CareerSource Research Coast Combined Metropolitan Statistical Areas | | | | Florida | | | |
|---|--|---------|--------|----------------|-----------|-----------|---------|----------------|
| | Dec-17 | Dec-16 | change | percent change | Dec-17 | Dec-16 | change | percent change |
| Total Employment | 201,800 | 199,700 | 2,100 | 1.1 | 8,801,900 | 8,581,400 | 220,500 | 2.6 |
| Mining, Logging, and Construction | 14,500 | 14,000 | 500 | 3.6 | 537,400 | 492,900 | 44,500 | 9.0 |
| Manufacturing | 9,300 | 8,400 | 900 | 10.7 | 375,700 | 359,700 | 16,000 | 4.4 |
| Trade, Transportation, and Utilities | 43,700 | 42,800 | 900 | 2.1 | 1,818,500 | 1,787,600 | 30,900 | 1.7 |
| Wholesale Trade | 6,200 | 6,000 | 200 | 3.3 | 355,600 | 341,800 | 13,800 | 4.0 |
| Retail Trade | 32,100 | 31,300 | 800 | 2.6 | 1,162,200 | 1,151,900 | 10,300 | 0.9 |
| Transportation, Warehousing, and Utilities | 5,400 | 5,500 | -100 | -1.8 | 300,700 | 293,900 | 6,800 | 2.3 |
| Information | 1,700 | 1,900 | -200 | -10.5 | 140,900 | 138,200 | 2,700 | 2.0 |
| Financial Activities | 8,400 | 8,200 | 200 | 2.4 | 569,800 | 556,300 | 13,500 | 2.4 |
| Professional and Business Services | 22,100 | 23,300 | -1,200 | -5.2 | 1,368,300 | 1,311,600 | 56,700 | 4.3 |
| Education and Health Services | 39,000 | 37,300 | 1,700 | 4.6 | 1,293,300 | 1,273,800 | 19,500 | 1.5 |
| Leisure and Hospitality | 26,600 | 27,300 | -700 | -2.6 | 1,199,300 | 1,188,000 | 11,300 | 1.0 |
| Other Services | 11,900 | 11,400 | 500 | 4.4 | 372,800 | 358,200 | 14,600 | 4.1 |
| Government | 24,600 | 25,100 | -500 | -2.0 | 1,125,900 | 1,115,100 | 10,800 | 1.0 |

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)).

Industry Snapshot

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

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

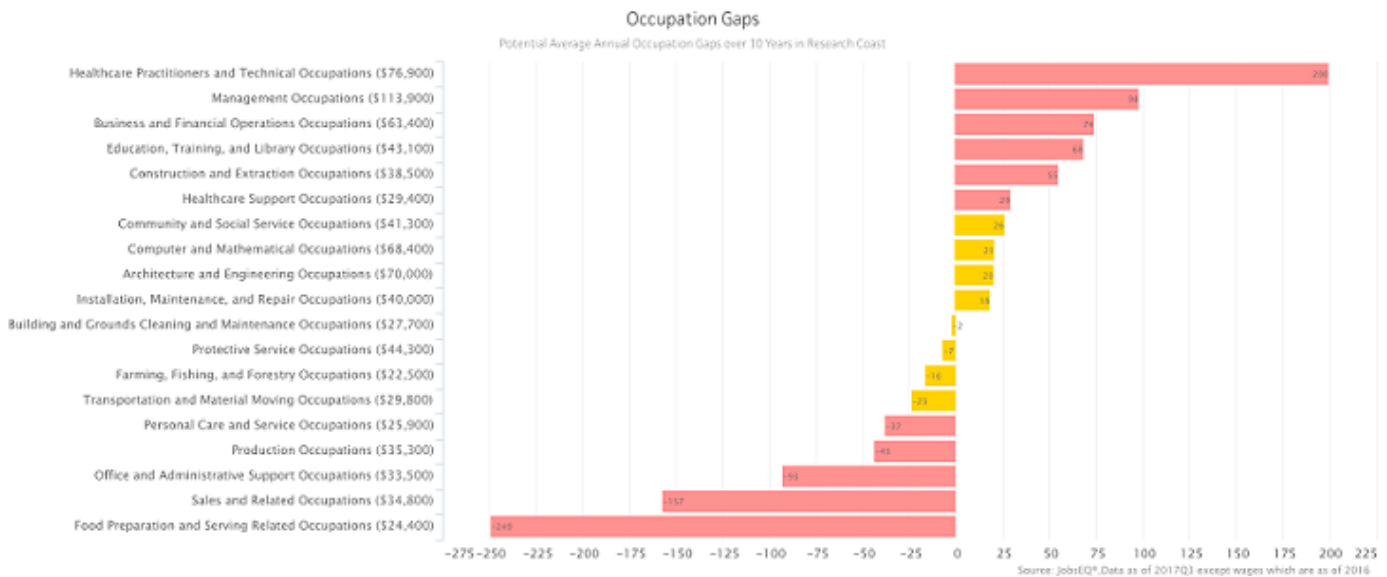
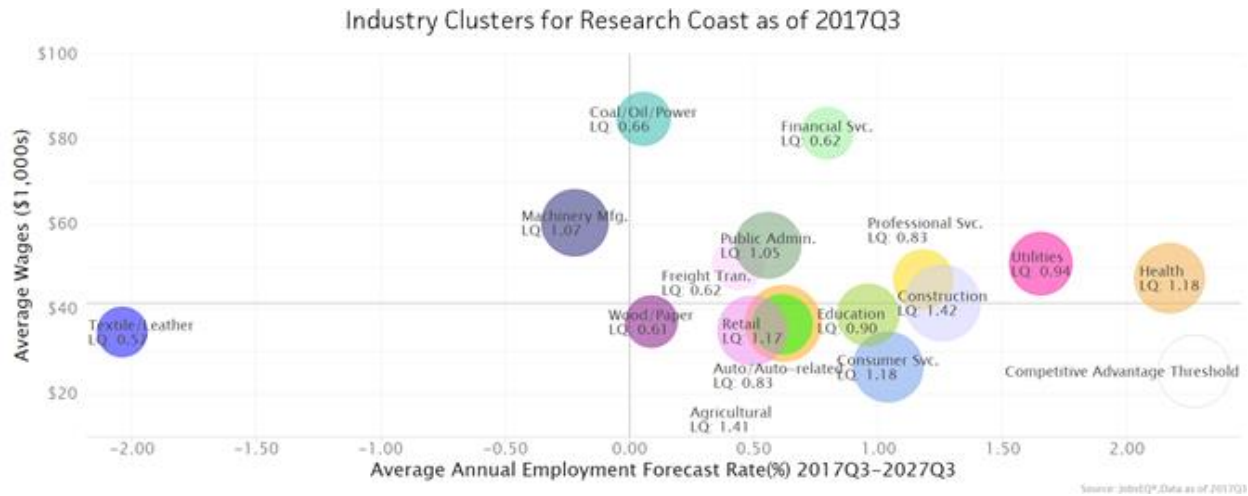
Over the next 4 years, employment in the LWDA is projected to expand by 9,084 jobs. The fastest growing sector in the LWDA is expected to be Health Care and Social Assistance with a +2.2% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Health Care and Social Assistance (+3,195 jobs), Construction (+872), and Accommodation and Food Services (+794).

| | | Current | | | Historical | | | | Forecast | | |
|-------|---|----------------------------------|-------------------|-------------------|------------------------------------|---|---------|-------|-------------------------|---------------------|----------------------------|
| | | Four Quarters Ending with 2017q3 | | | Total Change over the Last 5 Years | Average Annual % Change in Employment 2012q3-2017q3 | | | Over the Next 4 Years | | |
| NAICS | Industry | Empl | Avg. Annual Wages | Location Quotient | Empl | Research Coast | Florida | USA | Total Approx Sep Demand | Total Growth Demand | Avg. Annual Growth Percent |
| 11 | Agriculture, Forestry, Fishing and Hunting | 4,258 | \$39,113 | 1.42 | -2,281 | -8.2% | -1.3% | 0.7% | 1,848 | 112 | 0.6% |
| 21 | Mining, Quarrying, and Oil and Gas Extraction | 105 | \$47,754 | 0.12 | -18 | -3.2% | 1.0% | -5.3% | 42 | 0 | 0.0% |
| 22 | Utilities | 1,204 | \$96,252 | 1.07 | 62 | 1.1% | 0.5% | 0.2% | 436 | 9 | 0.2% |

| | | | | | | | | | | | |
|----|--|---------|-----------|------|--------|-------|-------|-------|--------|-------|-------|
| 23 | Construction | 16,760 | \$41,281 | 1.43 | 4,311 | 6.1% | 6.8% | 3.4% | 6,736 | 872 | 1.3% |
| 31 | Manufacturing | 9,211 | \$50,860 | 0.53 | 1,861 | 4.6% | 2.6% | 0.8% | 3,816 | -126 | -0.3% |
| 42 | Wholesale Trade | 5,454 | \$69,813 | 0.66 | -125 | -0.5% | 1.7% | 0.9% | 2,308 | 97 | 0.4% |
| 44 | Retail Trade | 30,763 | \$28,645 | 1.35 | 2,913 | 2.0% | 2.6% | 1.3% | 16,593 | 623 | 0.5% |
| 48 | Transportation and Warehousing | 5,642 | \$46,983 | 0.64 | 1,036 | 4.1% | 3.3% | 2.6% | 2,431 | 228 | 1.0% |
| 51 | Information | 2,044 | \$55,406 | 0.48 | -338 | -3.0% | 0.7% | 0.9% | 781 | -72 | -0.9% |
| 52 | Finance and Insurance | 5,181 | \$81,281 | 0.62 | 59 | 0.2% | 2.3% | 1.1% | 1,980 | 167 | 0.8% |
| 53 | Real Estate and Rental and Leasing | 4,395 | \$44,883 | 1.23 | 495 | 2.4% | 2.9% | 2.0% | 1,800 | 80 | 0.5% |
| 54 | Professional, Scientific, and Technical Services | 11,573 | \$60,567 | 0.84 | 2,305 | 4.5% | 3.5% | 2.3% | 4,050 | 565 | 1.2% |
| 55 | Management of Companies and Enterprises | 492 | \$106,049 | 0.16 | 11 | 0.4% | 4.3% | 2.7% | 180 | 16 | 0.8% |
| 56 | Administrative and Support and Waste Management and Remediation Services | 13,598 | \$32,983 | 0.99 | 1,214 | 1.9% | 4.1% | 2.5% | 6,427 | 784 | 1.4% |
| 61 | Educational Services | 14,544 | \$42,058 | 0.84 | 606 | 0.9% | 1.2% | 0.7% | 5,490 | 669 | 1.1% |
| 62 | Health Care and Social Assistance | 35,635 | \$47,073 | 1.18 | 5,611 | 3.5% | 2.6% | 2.5% | 13,905 | 3,195 | 2.2% |
| 71 | Arts, Entertainment, and Recreation | 6,560 | \$32,845 | 1.57 | 780 | 2.6% | 2.8% | 2.3% | 3,745 | 293 | 1.1% |
| 72 | Accommodation and Food Services | 21,207 | \$20,058 | 1.12 | 4,071 | 4.4% | 4.0% | 3.0% | 13,942 | 794 | 0.9% |
| 81 | Other Services (except Public Administration) | 12,177 | \$30,018 | 1.30 | 1,656 | 3.0% | 2.0% | -0.2% | 5,612 | 427 | 0.9% |
| 92 | Public Administration | 10,485 | \$53,664 | 1.05 | 257 | 0.5% | 0.3% | 0.1% | 3,892 | 235 | 0.6% |
| 99 | Unclassified | 146 | \$43,713 | 0.28 | 57 | 10.3% | 13.8% | 17.1% | 67 | 6 | 1.1% |
| | Total - All Industries | 211,434 | \$41,463 | 1.00 | 24,540 | 2.5% | 2.8% | 1.7% | 94,037 | 9,084 | 1.1% |

Industry Clusters

The industry cluster in the LWDA with the highest relative concentration is Construction with a location quotient of 1.42. This cluster employs 17,025 workers in the region with an average wage of \$41,410. Employment in the Construction cluster is projected to expand in the LWDA about 1.3% per year over the next ten years.



When assessing the skills in the workforce, many of the LWDA employers indicated that the skills most deficient in the workforce are soft skills. These skills include demonstrations such as employees showing up to work on time, working efficiently and getting along with coworkers. It was further noted that many individuals also lack basic office computer skills. To address the needs for soft skills training, CSRC has developed Work Certified™, an ideal program that truly helps career seekers understand what they must do to be successful in their place of work. The program not only addresses basic and soft skills, but also prepares individuals to understand and fulfill their role in workplace. The primary focus of this unique program is that it emphasizes the mastery of job skill competencies required by employers.

The approach is more of a "business-training" program with certification only given to participants who have demonstrated that they are truly ready to be responsible productive employees. This behavioral modification, team-building program advances career seekers' self-esteem, enabling them to find a job and keep a job.

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)).

Demographic Profile

The population in the LWDA was 592,070 per American Community Survey data for 2012-2016.

The LWDA has a civilian labor force of 257,887 with a participation rate of 52.3%. Of individuals 25 to 64 in the LWDA, 23.1% have a bachelor's degree or higher which compares with 31.8% in the nation.

The median household income in the LWDA is \$47,299 and the median house value is \$163,918.

Employment Trends

As of 2017-Q3, total employment for the LWDA was 211,434 (based on a four-quarter moving average). Over the year ending 2017-Q3, employment increased 1.1% in the LWDA.

Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2017-Q1 with preliminary estimates updated to 2017-Q3.

Unemployment Rate

The seasonally adjusted unemployment rate for the LWDA was 3.6% as of November 2017. The LWDA unemployment rate was lower than the national rate of 4.3%. One year earlier, in November 2016, the unemployment rate in the LWDA was 5.6%.

Unemployment rate data are from the Local Area Unemployment Statistics, provided by the Bureau of Labor Statistics and updated through November 2017.

Individuals with barriers to employment

The educational and skill levels of individuals with barriers to employment in LWDB 20 poses significant challenges in serving that population. Those barriers include, the lack of reliable public transportation to provide access to employment opportunities, criminal backgrounds, mental health and substance abuse. There is also lack of basic language, math and reading comprehension skills required to qualify applicants or post-secondary education or vocational training programs.

Wage Trends

The average worker in the LWDA earned annual wages of \$41,463 as of 2017-Q3. Average annual wages per worker increased 2.5% in the LWDA during the preceding four quarters. For comparison purposes, annual average wages were \$54,666 in the nation as of 2017-Q3.

Annual average wages per worker data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2017-Q1 with preliminary estimates updated to 2017-Q3.

Education Levels

Expected growth rates for occupations vary by the education and training required. While all employment in the LWDA is projected to grow 1.1% over the next ten years, occupations typically requiring a postgraduate degree are expected to grow 1.9% per year, those requiring a bachelor's degree are forecast to grow 1.4% per year, and occupations typically needing a 2-year degree or certificate are expected to grow 1.6% per year.



| | Percent | | | value | | |
|--|----------------|---------|-------|----------------|------------|-------------|
| | Research Coast | Florida | USA | Research Coast | Florida | USA |
| Demographics | | | | | | |
| Population (ACS) | — | — | — | 592,070 | 19,934,451 | 318,558,162 |
| Male | 48.7% | 48.9% | 49.2% | 288,634 | 9,741,262 | 156,765,322 |
| Female | 51.3% | 51.1% | 50.8% | 303,436 | 10,193,189 | 161,792,840 |
| Median Age ² | — | — | — | 47.8 | 41.6 | 37.7 |
| Under 18 Years | 19.0% | 20.4% | 23.1% | 112,549 | 4,066,276 | 73,612,438 |
| 18 to 24 Years | 7.1% | 8.9% | 9.8% | 42,140 | 1,774,488 | 31,296,577 |
| 25 to 34 Years | 9.9% | 12.7% | 13.6% | 58,755 | 2,532,527 | 43,397,907 |
| 35 to 44 Years | 10.4% | 12.2% | 12.7% | 61,568 | 2,434,272 | 40,548,400 |
| 45 to 54 Years | 13.2% | 13.8% | 13.6% | 78,223 | 2,744,569 | 43,460,466 |
| 55 to 64 Years | 14.1% | 13.0% | 12.6% | 83,760 | 2,584,694 | 40,061,742 |
| 65 to 74 Years | 13.6% | 10.5% | 8.3% | 80,604 | 2,084,139 | 26,355,308 |
| 75 Years, and Over | 12.6% | 8.6% | 6.2% | 74,471 | 1,713,486 | 19,825,324 |
| Race: White | 80.1% | 75.9% | 73.3% | 474,395 | 15,130,748 | 233,657,078 |
| Race: Black or African American | 13.4% | 16.1% | 12.6% | 79,061 | 3,216,994 | 40,241,818 |
| Race: American Indian and Alaska Native | 0.3% | 0.3% | 0.8% | 1,814 | 52,904 | 2,597,817 |
| Race: Asian | 1.5% | 2.6% | 5.2% | 8,907 | 521,272 | 16,614,625 |
| Race: Native Hawaiian and Other Pacific Islander | 0.0% | 0.1% | 0.2% | 125 | 11,288 | 560,021 |
| Race: Some Other Race | 2.8% | 2.5% | 4.8% | 16,282 | 505,877 | 15,133,856 |
| Race: Two or More Races | 1.9% | 2.5% | 3.1% | 11,486 | 495,368 | 9,752,947 |
| Hispanic or Latino (of any race) | 15.0% | 24.1% | 17.3% | 88,683 | 4,806,854 | 55,199,107 |

Population Growth

| | | | | | | |
|---|------|------|------|---------|------------|-------------|
| Population (Pop Estimates) ⁵ | — | — | — | 616,771 | 20,612,439 | 323,127,513 |
| Population Annual Average Growth ⁵ | 1.6% | 1.3% | 0.8% | 8,826 | 244,545 | 2,474,760 |

Economic

| | | | | | | |
|---|-------|-------|-------|----------|-----------|-------------|
| Labor Force Participation Rate and Size (civilian population 16 years and over) | 52.3% | 58.7% | 63.3% | 257,887 | 9,557,443 | 159,807,099 |
| Armed Forces Labor Force | 0.1% | 0.3% | 0.4% | 379 | 56,151 | 1,011,641 |
| Veterans, Age 18-64 | 5.7% | 5.8% | 5.1% | 18,485 | 694,218 | 10,165,671 |
| Median Household Income ² | — | — | — | \$47,299 | \$48,900 | \$55,322 |
| Per Capita Income | — | — | — | \$29,151 | \$27,598 | \$29,829 |
| Poverty Level (of all people) | 15.4% | 16.1% | 15.1% | 90,005 | 3,139,258 | 46,932,225 |
| Households Receiving Food Stamps | 11.4% | 14.8% | 13.0% | 26,207 | 1,092,862 | 15,360,951 |
| Mean Commute Time (minutes) | — | — | — | 25.9 | 26.7 | 26.1 |
| Commute via Public Transportation | 0.5% | 2.1% | 5.1% | 1,045 | 182,328 | 7,476,312 |
| Union Membership ³ | 7.0% | 5.9% | 10.7% | — | — | — |

Educational Attainment, Age 25-64

| | | | | | | |
|-------------------------|-------|-------|-------|--------|-----------|------------|
| No High School Diploma | 13.1% | 11.4% | 11.6% | 37,031 | 1,173,167 | 19,478,050 |
| High School Graduate | 29.5% | 28.3% | 26.1% | 83,387 | 2,917,112 | 43,788,541 |
| Some College, No Degree | 22.2% | 20.9% | 21.5% | 62,621 | 2,155,654 | 36,025,193 |
| Associate's Degree | 12.1% | 10.8% | 8.9% | 34,073 | 1,110,534 | 14,962,488 |
| Bachelor's Degree | 15.1% | 18.9% | 20.2% | 42,536 | 1,950,524 | 33,845,524 |
| Postgraduate Degree | 8.0% | 9.6% | 11.6% | 22,658 | 989,071 | 19,368,719 |

Housing

| | | | | | | |
|--|-------|-------|-------|-----------|-----------|-------------|
| Total Housing Units | — | — | — | 294,104 | 9,152,815 | 134,054,899 |
| Median House Value (of owner-occupied units) ² | — | — | — | \$163,918 | \$166,800 | \$184,700 |
| Homeowner Vacancy | 2.4% | 2.5% | 1.8% | 4,200 | 125,551 | 1,395,797 |
| Rental Vacancy | 11.7% | 8.5% | 6.2% | 8,237 | 245,911 | 2,855,844 |
| Renter-Occupied Housing Units (% of Occupied Units) | 26.5% | 35.2% | 36.4% | 60,744 | 2,605,942 | 42,835,169 |
| Occupied Housing Units with No Vehicle Available (% of Occupied Units) | 5.5% | 6.9% | 9.0% | 12,559 | 511,316 | 10,562,847 |

Social

| | | | | | | |
|---|-------|-------|-------|--------|-----------|------------|
| Enrolled in Grade 12 (% of total population) | 1.2% | 1.3% | 1.4% | 6,900 | 251,628 | 4,433,703 |
| Disconnected Youth ⁴ | 3.4% | 3.4% | 2.8% | 883 | 32,580 | 485,589 |
| Children in Single Parent Families (% of all children) | 36.6% | 39.8% | 34.7% | 39,014 | 1,531,708 | 24,318,038 |
| With a Disability, Age 18-64 | 11.8% | 10.1% | 10.3% | 37,937 | 1,195,416 | 20,188,257 |
| With a Disability, Age 18-64, Labor Force Participation Rate and Size | 37.0% | 37.8% | 41.0% | 14,029 | 452,139 | 8,278,834 |
| Foreign Born | 13.1% | 19.9% | 13.2% | 77,666 | 3,967,671 | 42,194,354 |
| Speak English Less Than Very Well (population 5 yrs and over) | 7.5% | 11.7% | 8.5% | 42,214 | 2,199,976 | 25,440,956 |

| 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 20 | 272,981 | 261,086 | 11,895 | 4.4% | 272,752 | 261,800 | 10,952 | 4.0% | 271,591 | 256,881 | 14,710 | 5.4% |

Source: U.S. Bureau of Labor Market Statistics, LMI program.
Prepared by Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, January 2018

| 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 of 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 20 | 13,918 | 3,125 | 22.5% | 884 | 197 | 22.0% | 61 | 0 | 0.0% | 70,503 | 4,770 | 6.77% |

| Region | Educational Attainment for the Civilian Labor Force Aged 25-64 (2016 Estimates) | | | |
|--------|---|--|------------------------------------|-----------------------------|
| | Less than high school graduate | High school graduate (includes equivalent) | Some college or associate's degree | Bachelor's degree or higher |
| | WDA 20 | 37,031 13.1% | 81,387 29.0% | 95,884 34.3% |

Source: U.S. Census Bureau, American Community Survey.
Prepared by Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, January 2018

Top 15 Emerging Occupations

(ranked by percent growth)

Workforce Development Area 20 - Indian River, Martin, and Saint Lucie Counties

| Rank | SOC Code | Title | 2017 - 2025 | | | | Industry Sector Linkage | 2017 Hourly Wage (\$) | | |
|------|----------|---|-------------|------|--------|---------|-------------------------|-----------------------|--------|-------|
| | | | Employment | | Level | Percent | | Median | Entry* | Exp** |
| | | | 2017 | 2025 | Change | Change | | | | |
| 1 | 514012 | Computer Controlled (CNC) Mach. Tool Programmers, N | 14 | 19 | 5 | 35.7 | Manufacturing | 29.00 | 25.05 | 30.55 |
| 2 | 312021 | Physical Therapist Assistants | 221 | 299 | 78 | 35.3 | Healthcare | 30.88 | 26.93 | 36.08 |
| 3 | 291071 | Physician Assistants | 109 | 146 | 37 | 33.9 | Healthcare | 58.51 | 40.69 | 65.66 |
| 4 | 312011 | Occupational Therapy Assistants | 71 | 95 | 24 | 33.8 | Healthcare | 32.96 | 27.42 | 36.22 |
| 5 | 291171 | Nurse Practitioners | 294 | 389 | 95 | 32.3 | Healthcare | 49.19 | 40.02 | 62.92 |
| 6 | 514011 | Computer-Controlled Machine Tool Operators, M&P | 36 | 47 | 11 | 30.6 | Manufacturing | 20.90 | 16.22 | 22.96 |
| 7 | 332021 | Fire Inspectors and Investigators | 14 | 18 | 4 | 28.6 | Government | 32.77 | 25.19 | 35.70 |
| 8 | 292032 | Diagnostic Medical Sonographers | 135 | 173 | 38 | 28.1 | Healthcare | 29.66 | 21.63 | 32.75 |
| 9 | 151134 | Web Developers | 89 | 113 | 24 | 27.0 | Professional Services | 19.95 | 16.88 | 29.52 |
| 10 | 172121 | Marine Engineers and Naval Architects | 15 | 19 | 4 | 26.7 | Professional Services | 46.54 | 30.97 | 51.64 |
| 11 | 312022 | Physical Therapist Aides | 84 | 106 | 22 | 26.2 | Healthcare | 14.00 | 12.19 | 15.36 |
| 12 | 292057 | Ophthalmic Medical Technicians | 166 | 209 | 43 | 25.9 | Healthcare | 18.03 | 14.66 | 20.06 |
| 13 | 152031 | Operations Research Analysts | 43 | 54 | 11 | 25.6 | Professional Services | 23.75 | 19.15 | 26.77 |
| 14 | 273031 | Interpreters and Translators | 24 | 30 | 6 | 25.0 | Professional Services | 21.91 | 14.18 | 25.67 |
| 15 | 151132 | Software Developers, Applications | 213 | 265 | 52 | 24.4 | Professional Services | 33.89 | 25.13 | 44.71 |

* Entry Wage - The wage an entry-level worker might expect to make. It is defined as the average (mean) wage earned by the lowest third of all workers in a given occupation.

** Experienced Wage - The wage an experienced worker might expect to make. It is defined as the average (mean) wage earned by the upper two-thirds of all workers in a given occupation.

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

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

CareerSource Research Coast in partnership with local economic development organizations conducted a skills & talent gap analysis needed to meet the employment needs of the employers in the local area. In the study employers also reported major soft skills gaps, such as attendance, dependability, teamwork, problem solving, in applicants applying for job vacancies. Based on that research, the area's employment needs of employers are listed below:

Employment needs by Sector Occupations:

Healthcare - Registered Nurses, Medical and Health Service Managers, Licensed Practical Nurses, Physical Therapists, and Occupational Therapists

Construction and Skilled Trades - Brick masons, Block masons, and Stonemasons, Carpenters, Cement Masons and Terrazzo Workers, Construction and Building Inspectors, Construction Equipment Operators, Drywall and Ceiling Tile Installers and Tapers, Electricians, Painters, Plumbers & Pipefitters, Roofers

Manufacturing - Machinists, Tool & Die Makers, Production Technicians, Laminators, Sheet Metal Workers, Fabricators, Welders.

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

CSRC is dedicated to meeting the needs of both employed and underemployed workers, career seekers seeking assistance with career decisions, skill training, job connections and offers career, basic, individualized, follow-up and training services. CSRC, through the direct services model, serves as the direct services provider and provides all WIOA Adult/Dislocated Worker, TAA, TANF, SNAP, Wagner Peyser, MSFW, ReEmployment, and Jobs for Veterans State Grant activities and services throughout the LWDA. The WIOA Youth Program activities and services are contracted through a competitively procured Subrecipient Agreement. Through collaborative efforts with local community based organizations and educational institutions, as well as the WIOA implementation with core partners and our Comprehensive One-Stop Career Center, career seekers in the LWDA have full access to allowable basic, individualized, follow-up, training and support services.

IRSC and the Indian River County School District provide options for secondary diploma attainment and vocational training in the LWDA. CSRC partners with these educational entities to ensure the vocational training is relevant to our LWDA through the CSRC RDOL policy and ETPL policy. CSRC supports the training by providing Individual Training Accounts (ITAs) and supportive services to WIOA/TAA eligible and suitable participants.

Registered apprenticeship programs are available through IRSC and labor unions. CSRC funds training through ITAs, Internships and On-the-Job Training (OJT) agreements. Under CareerSource Florida's sector strategy policy and their sector strategy initiatives, CSRC received three (3) grants. These grants address the lack of a skilled pipeline of workers to meet the current and future market demands of our local manufacturing and healthcare industries. Under a Pathways to Prosperity grant, CSRC will provide a Pre-Apprenticeship Program to prepare participants for entry into a registered Apprenticeship Program and/or facilitate their transition into jobs in the manufacturing industry. The Pre-Apprenticeship Program curriculum will provide the participants with stackable credentials, along with work readiness training, that will ensure that completers will successfully enter and progress in a wide variety of occupations in the manufacturing industry. Under a Sector Strategies grant, CSRC along with our local economic development partners and our local manufacturing employers, will develop a registered apprenticeship program to provide a meaningful career pathway for those career seekers interested in the manufacturing industry sector. Under a Community Based Sector Strategy grant, CSRC will address the critical need of local healthcare industry employers for Registered Nurses.

CSRC provides many options for workforce development activities for youth ages 16-24. Activities provided directly to youth by CSRC include: Youth Employment Success Solutions (YESS) Curriculum, lessons on positive lifestyle choices and employability skills, GED and

various testing remediation, workshops, occupational credentialing, leadership and entrepreneurial activities, financial literacy training, basic skills remediation, job placement, work experience/internship opportunities, job shadowing activities, and OJT. The WIOA Youth program provides focused case management to encourage successful completion of training programs by participants. The WIOA Youth program tailors career pathways to the commitment level and interests of the youth participants.

CSRC relentlessly assists the area's economic disadvantaged youth to mitigate their barriers to obtain educational and employability skills in order to attain gainful employment and achieve self-sufficiency. The strengths of the CSRC WIOA Youth program are credited to the strong collaborative partnerships with local community based organizations, local government and local employers.

Weaknesses of the workforce development activities offered to WIOA Youth are as follows: WIOA funding restrictions can limit training opportunities, the lack of vocational training opportunities for youth that may not be college-bound, the lack of transportation and workforce development activities for youth residing in rural areas is limited.

A significant portion of the unemployed lack basic skills in demand by employers. One of the deficiencies that continues to be recognized is a lack of soft skills. This issue was further documented through the recent Treasure Coast Skills Gap Study, spearheaded by the St. Lucie County Economic Development Council. This Study brought together CSRC, groups of educational leaders and groups of business leaders throughout the LWDA to assess the challenges and uncover solutions that will tackle the current skills gaps identified in the LWDA. To meet these needs, CSRC offers the Work Certified™ program. Work Certified™ is a work readiness program that was created in partnership with employers, educators, and workforce professionals to enhance career seeker's skills. It provides training to individuals who need life skills, remedial education, employability skills, and emotional intelligence. The program awards certification only to those participants who are able to demonstrate they are ready to be responsible, productive employees. As a result of the aforementioned Treasure Coast Skills Gap Study and as an integral component of our sector development, the Work Certified™ curriculum will be customized for each of the three industry sectors (manufacturing, health care and construction/trades/logistics) that CSRC will strategically focus on.

One of the main challenges of a significant portion of the TANF population is lack of transportation. Public transportation is limited and/or non-existent in the LWDA. Additionally, many lack basic computer skills, basic job skills, education/training/high school diploma and childcare. A percentage of the TANF population does not speak English and many have a criminal background.

CSRC through the Welfare Transition (WT) Program offers services to assist with many of the issues noted above. Support services provided by the WT program are gas assistance, vehicle repair, assistance with obtaining vehicle insurance, vehicle registration, providing child care through the partnership with the Early Learning Coalition, and providing tuition assistance

for GED and ESOL classes at IRSC and the Indian River County School District. Federal bonding is available for those participants who meet the criteria requirement at no charge.

WT provides tuition assistance for several approved courses of study and can also provide supportive services such as uniforms, books, registration fees and required work related equipment/tools.

Approximately 45% of children in Florida are from low-income households with parents who work. Child care stands out as perhaps the singularly most important social service in recognition of its impact on the entire family. It provides clear economic benefit to employers and communities. In short, child care is an instrumental support to parents, both in the reduction of stress and in the opportunity to work, achieve higher credentials through education and training that lead to economic and family stability. Although work support benefits associated with the Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) have helped recipients maintain employment and survive on limited incomes, often the programs paradoxically create disincentives for progression along a wage or career path necessary to lift a household permanently out of poverty. Recent research calls attention to “cliff effects” as a particularly problematic disincentive associated with many work support policies. Cliff effects penalize households financially for progressing beyond income thresholds of work support eligibility. Evidence that cliff effects undermine anti-poverty programs is of increasing concern to early childhood practitioners and workforce development professionals alike.

To meet the needs of children and parents simultaneously, the package of workforce and childcare benefits need to be streamlined and coordinated for ease of access to families. Programs that encourage education, skill development and career pathways will help move families toward long-term economic stability. In order to create pathways that bring the promise of long-term financial security, we must shift the conversation from moving parents off of public assistance as quickly as possible to one providing real opportunities to parents with low incomes to access the education, training and supports needed to keep jobs in high-demand industries.

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

Thirty (30) low income families in Martin and St. Lucie Counties will be served. The proposed model uniquely highlights the mitigation of fiscal cliffs as a critical relief valve for families. Two complementary elements shape the proposed project: (1) the integration of a phase-out period to mitigate the fiscal cliff created by the abrupt termination of child care benefits and (2) career readiness combined with sector strategies to encourage progression of target families.

The two-generation approach provides opportunities for and meets the needs of children and their parents together. To increase economic prosperity of workers, opportunities are

created for low-income families to join and succeed in today's workforce by supporting the coordination of human service providers, workforce training and post-secondary programs. Aligning WIOA, TANF and other resources to incentivize partnerships with childcare providers that deliver high quality childcare increases the likelihood of positive outcomes for children, including better academic achievement and ultimately financial well-being as adults.

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

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

CSRC uses a variety of methods including focus groups and interviews to identify the workforce needs of businesses, career seekers and workers in the LWDA. The recent Treasure Coast Skills Gap Study spearheaded by the St. Lucie Economic Development Council brought CSRC, groups of educational leaders and groups of business leaders throughout the LWDA to assess the challenges and uncover solutions that will tackle the current skills gaps identified in our communities. As a result of the study, a Workforce Readiness Taskforce was formed for the LWDA.

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

Once enrolled in WIOA, eligible and suitable career seekers receive employment assessments and labor market information, including our RDOL and ETPL, to determine the best career pathway for self-sufficiency. Before being placed in any training program, career seekers are tested using a variety of assessment tools, including Prove-IT, TABE, MyCareerShines, Workforce Skills for the 21st Century and Aviator to ensure the educational preparation to be successful.

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

For the LWDA, CSRC is the only provider of youth workforce investment activities administered through a subrecipient agreement with a contracted WIOA Youth program provider. CSRC operates with a fully functional Youth Council that consists of private businesses, education partners and community-based organizations which contribute to the enhancement of youth workforce investment activities through their own programs. Through WIOA Youth services, CSRC ensures quality delivery of the required 14 elements of WIOA Youth programming by providing incentive plans, establishing youth goals and program activities. For youth with disabilities, youth staff makes every reasonable accommodation for WIOA service administration to youth. Necessary accommodations for youth with disabilities are identified by Individual Education Plan (IEP) records, provided by local school districts or by medical records. CSRC also partners with VR to better serve youth with disabilities. Successful models for the administration of youth workforce investment activities implemented by CSRC include an incentive policy that drives youth to complete skills gains in a methodic, pathway-oriented order, a quality work-based learning model (work experience/internship), YESS employability skills training and occupational credential options that are stackable.

WORKFORCE DEVELOPMENT AREA VISION AND STRATEGIC GOALS

- 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)).**

The workforce system envisioned by WIOA is designed to increase access to, and opportunities for, the employment, education, training, and support services that individuals need to succeed in in the regional and local labor markets, particularly those with barriers to employment. Workforce development, education, and economic development need to align to meet the needs of local employers and provide a comprehensive, high-quality workforce development system. To accomplish this and to accomplish the primary indicators of performance of WIOA, all customers should have access to high-quality Career Centers that connect them with the full range of services available in their communities. CSRC has developed the following vision, mission, goals and objectives in order to create a high quality Career Center system in the LWDA:

Vision:

To be the catalyst empowering our communities toward economic success.

Mission:

Provide Opportunities. Improve Lives.

Areas of Focus and Associated Goals:

- *Customer–Centric Culture:* Expand our ability to identify and exceed customer needs and expectations.
- *Collaborative Partnerships:* Expand our ability to meet the diverse needs in our community.
- *Marketing:* Expand the awareness and understanding of the roles and responsibilities of CSRC and the resources, services and activities we and our partners can provide.
- *Innovation:* Promote continuous improvement.
- *Talent Management:* Be the best place to work.

Objectives:

1. Provide a career planning approach to all career seekers accessing our Career Centers that facilitates the development of career pathways (in addition to technical assistance currently provided).
2. Provide exceptional customer service and access to multiple resources available in our communities.
3. Develop formal, written agreements with targeted partners that align resources and clearly define the roles and responsibilities of the partnership.
4. Establish synergy between/among all programs and services overcoming barriers to communication and promoting co-enrollment in programs as appropriate.
5. Communicate our vision, mission and values to community stakeholders, partners and the general public through a concentrated marketing strategy.
6. Inform our community stakeholders of any and all changes in our workforce operations.
7. Improve internal communication and the sharing of information throughout the organization.
8. Develop a formal onboarding program for CSRC employees to ensure the service delivery team are skilled, qualified, adaptable and knowledgeable of local labor market information and the programs and services offered and the resources available.
9. Create a culture of continuous learning and cross-training.
10. Develop a formal succession program.
11. Implement an efficient and relevant performance appraisal program that promotes accountability across the system and directly ties to the performance indicators of WIOA.

Core Values & Beliefs:

We.....

Operate with the most integrity.

Form quality partnerships.

Deliver excellence in performance.

Never settle; staying innovative and embracing change.

Are lifelong learners.

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

As part of the WIOA implementation with core partners and in developing CSRC's Comprehensive One-Stop Career Center, the following WIOA required and core partners were included: 1) WIOA Adult, Dislocated Worker, Youth Programs and Youth Build, 2) MSFW Program, 3) Wagner-Peyser Act services, 4) TAA activities, 5) Jobs for Veterans State Grant, 6) CSBG employment and training activities, 7) Programs authorized under Florida unemployment compensation laws, 8) TANF, 9) Adult Education and Literacy activities authorized under title II of WIOA, 10) VR Program, 11) Career and Technical Education Programs authorized under the Carl D. Perkins and Technical Education Act of 2006, 12) Division of Blind Services, (13) Senior Community Service Employment Program. Two (2) of the required core partners in the CSRC LWDA, the Department of Housing and Urban Development (HUD) and the Programs authorized under sec. 21 of the Second Chance Act of 2007, have provided documentation to CSRC that they do not carry out employment and training activities in the LWDA. Through the CSRC Comprehensive One Stop Career Center, these programs and their providers will ensure that employers and career seekers become a shared client base across the core programs for the purpose of providing access to information and services that lead to career pathways and positive employment outcomes.

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

The following strategies will be utilized to support alignment of core program services, resources and programs of study in order to facilitate the development of career pathways for customers and co-enrollment, as appropriate, in activities leading to recognized post-secondary credentials and self- sufficient employment:

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

Attachment E – MOU for the Comprehensive One-Stop Career Center

CSRC also utilizes an integrated and expert intake process of all clients entering the Career Centers. CSRC frontline staff will be highly familiar with the functions and basic eligibility requirements of each core program and will be able to appropriately assist clients and make knowledgeable referrals to partner programs. This will be achieved through cross training, informational partner meetings, partner program literature/media and staff meetings. CSRC has begun this strategy by scheduling cross training sessions to include all WIOA required and core partners of the Comprehensive One Stop Career Center and CSRC staff.

A formal and reportable referral system has been developed between CSRC and partner programs to identify shared customers (employers and career seekers) in order to provide integrated, non-duplicative services and to share performance outcomes.

An integrated and aligned business services approach will be incorporated among partners to present a unified voice for the LWDA in its communications with employers. One example is CSRC's involvement with our local VR's Business Leadership Network (BLN).

Dual board membership, participation on committees, etc., with core program partners will occur to further align workforce activities with their resources and services.

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

The action steps CSRC will take toward remaining a high-performing board under WIOA to achieve the goals and objectives of our strategic vision which are consistent to Florida's strategic vision for WIOA implementation and the three (3) goals set to accomplish the vision. Our strategic vision and goals reflect the characteristics of a high-performing Career Center system; excellent customer service, innovation, strong partnerships and systems integration, and high quality staffing. Action steps will include the following:

CSRC has set goals in correlation to CareerSource Florida Inc.'s strategic vision and the three (3) goals to accomplish the vision.

- CSRC will offer meaningful access to all clients by providing robust virtual services as well as person-oriented service delivery at the Career Centers.
- Improve upon, design and implement practices that actively engage targeted industry sectors, promote career pathways, registered apprenticeships and promote skill-based initiatives.
- Improve career exploration, educational attainment and skills training for in-demand industries for youth that lead to enhanced employment, career development, credentialing and post-secondary education opportunities.
- Establish strong partnerships with core and other partner programs, share data as appropriate, establish common goals, create a shared customer base (employers and career seekers) and provide opportunities for career seekers at all skill levels.
- Provide and participate in cross-agency training to CSRC staff, partner and service provider staff that promotes accountability for productive outcomes.
- Create and implement a formal cross-functional training program for Career Center staff.
- Provide subject matter expert learning and development opportunities.
- Provide continuous customer service training for all employees.
- Develop a customer service survey and determine the best delivery method.
- Develop performance criteria to use for assessment of effectiveness and for continuous improvement.
- Expand and enhance outreach activities, access to transportation and other supportive services.
- Review, revise and develop policies and procedures that ensure a coordinated and responsive service delivery system.

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

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

- Develop a combined intake tool for core partners in the CSRC Comprehensive One-Stop Career Center to help identify target populations, provide assessment to determine their individual needs and programs eligibility, track and streamline service delivery. At CSRC's Martin County Career Center, VR has begun to host orientation sessions for its clients which includes a segment that provides information on CSRC employment services. At all of CSRC Career Centers, VR will provide their client's intake information and assessment packets at the time of referral for the purpose of streamlining the intake process of our shared clients/career seekers.
- CSRC was approved to operate as an Employment Network (EN) in the Ticket to Work (TTW) program effective November 8, 2017.

- Increase the usage of assistive technology services and devices to improve service delivery and communication.
- Provide training to all CSRC staff to ensure they are sensitive to the unique needs of individuals and that they are prepared to provide for or refer for necessary accommodations.
- Conduct cross training with core partners' staff, other partner program staff and CSRC staff to promote relationship building in areas such as job search techniques, job development, employer and training services.
- Develop protocol for staff working with individuals with disabilities that ensures the preservation of confidentiality of the customer.
- Develop and implement data sharing agreements among partner programs that serve individuals with disabilities that increase effective support of customers served by the Career Centers, consistent with privacy and confidentiality policies.
- Ensure that all marketing and recruitment materials mention that services are available to individuals with disabilities.
- Identify and collaborate, on an ongoing basis, with local community or advocacy organizations, agencies and schools that provide services and support to individuals with disabilities to educate them about our services and to share resources.
- In partnership with other local organizations, network with the employer community and the core programs that serve individuals with disabilities to make a "business case" by offering OJT, customized training, etc., for hiring individuals with disabilities. CSRC, VR and the Division of Blind Services have established Business Services teams working together to serve employers in the LWDA.
- Provide employers with disability awareness training in partnership with VR.
- Develop and maintain a list of local agencies and resources that assist individuals with disabilities and make this information available to CSRC staff and clients.
- CSRC has adapted its employability skills/work readiness curriculum, YESS, to meet the VR standards for employability skills training for in school students, ages 15+. CSRC is an approved vendor for VR and can provide the YESS curriculum to transition students at local high schools in the LWDA.

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

Change affects employees at every level of an organization. Research shows that actively managing change can increase the success of the organization. Therefore, CSRC has decided to embrace the changes WIOA legislation brings to the workforce system as an opportunity to help improve operations and thrive. In August of 2015, CSRC put together a leadership team. The team members were appointed based on their roles, responsibilities and expertise within our organization. The team attended a two day "leadership" training that was facilitated by a professional consultant and trainer specializing in leadership and organizational effectiveness.

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

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

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

In late August of 2015, a sample cross-section of CSRC staff members were chosen and met with Executive Management. The leadership team's ideas, values, and strategies were brought forward to these staff members in order to create and adopt a shared vision and mission for the LWDB 20 Board of Directors. This group was asked for opinions, ideas and ultimately for agreement, support and "buy in". Staff members, who volunteered to do so, were asked to present a core value and belief to all staff members at a scheduled CSRC staff retreat.

On September 15, 2015, CSRC held a full day staff retreat. The theme of the retreat was "One Vision...One Mission...One Team". The purpose of the retreat was to create a shared vision that all would embrace and support. At the retreat, leadership team members presented the new vision, mission, strategic goals and objectives for CSRC. The appointed staff members presented on each of the core values and beliefs of the organization. All team members were asked for agreement and commitment to the new CSRC vision and mission. Every team members present signed a ONE VISION...ONE MISSION...ONE TEAM banner that is displayed in the CSRC Board Room.

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

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

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

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

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

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

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

| 2017 2018 FLORIDA WORKFORCE COMMON PERFORMANCE MEASURES | | |
|---|-------------------------------|--|
| Common Measures | PY 2017-2018 Negotiated Goals | Potential % of PY 2017-18 Goal Met (Based on current performance) |
| Adults: | | |
| 1 Employed 2 nd Quarter After Exit | 86.00% | 104.34% |
| 2 Employed 4 th Quarter After Exit | 84.00% | 102.40% |
| 3 Median Wage 2 nd Quarter After Exit | \$7,850.00 | 104.48% |
| Dislocated Workers: | | |
| 4 Employed 2 nd Quarter After Exit | 75.00% | 97.37% |
| 5 Employed 4 th Quarter After Exit | 77.00% | 99.45% |
| 6 Median Wage 2 nd Quarter After Exit | \$6,850.00 | 106.55% |
| Youth Common Measures: | | |
| 7 Employed 2 nd Quarter After Exit | 76.00% | 109.50% |
| 8 Employed 4 th Quarter After Exit | 69.00% | 109.99% |
| Wagner-Peyser: | | |
| 9 Employed 2 nd Quarter After Exit | 64.00% | 101.27% |
| 10 Employed 4 th Quarter After Exit | 60.00% | 101.35% |
| 11 Median Wage 2 nd Quarter After Exit | \$4,850.00 | 118.66% |
| Not Met (less than 90% of negotiated) | Met (90-100% of negotiated) | Exceeded (greater than 100% of negotiated) |

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

At the beginning of each program year as performance measures are negotiated and assigned to CSRC, the executive leadership team of CSRC develops strategic goals that will lead to the accomplishment of these required performance measures and provide evidence of CSRC’s effectiveness. Strategic goals are set for all programs and then drilled down to the assignment of specific goals for every CSRC team member. All CSRC program staff are assigned individual goals that directly contribute to the achievement of performance measures, achievement of any incentives for performance and which hold each staff member accountable for performance.

Performance Reports for the strategic goals are produced bi-weekly for review by the executive leadership team. These reports are analyzed at weekly management team meetings and monthly Operations meetings and, if needed, recommendations/strategies for improvement are made and corrective actions taken. Individual staff goals are formally evaluated with each team member by the appropriate manager on a quarterly basis and reported to the Senior Vice President of Operations. This strategy allows frontline staff, management and administration to keep abreast of the progress and effectiveness. However, most importantly, it allows time for individual and/or system wide corrective actions to be taken in order to get on track to meet performance measures and operate in the most effective manner.

Through the Subrecipient Agreement for our WIOA Youth Program, performance goals are set at contract negotiations and then at the beginning of each program year the contract is renewed. These goals are directly tied to the achievement of performance measures and to demonstrate the effectiveness of the youth program service delivery system. The WIOA Youth Provider is required to submit monthly reports regarding progress towards the achievement of these negotiated goals. The Subrecipient Agreement with the WIOA Youth Services Provider is structured as a cost reimbursement contract with performance deliverables. The performance deliverables are directly tied to federal youth measures.

Performance of all programs and progress toward CSRC local goals are brought to the CSRC Programs and Services Committee meetings which are held every other month (six times per year) and to the CSRC Executive Committee meetings which occur each month for review/discussion with final presentation to the full Board of Directors meetings which are held every other month. Youth performance and progress toward CSRC local goals are brought to the CSRC Youth Council meetings, which are held every other month, for review and discussion before presentation to the Executive Committee and the full Board of Directors.

Under the Subrecipient Agreement for the One-Stop Operator of CSRC's Career Center System, the One-Stop Operator's major function is the coordination of the service delivery among the required One-Stop System Partners and their programs. The One-Stop Operator will navigate between the One-Stop Partners to ensure there is coordination of programs and services for effective service delivery for employers and career seekers within the Career Center System. The One-Stop Operator will submit written quarterly reports to the CSRC Board of Directors recommendations to improve the One-Stop Partner's integrated service delivery to customers and the identification of best practices to include the progress of the collaboration between the partners.

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

For CSRC, the income levels used to qualify employed workers for intensive and training services and to identify self-sufficient employment opportunities for dislocated and employed workers will be, either individually earned or combined family earnings, \$30.74 per hour to allow a greater number of individuals to be served and more workers prepared to meet the needs of local employers.

COORDINATION OF SERVICES

1. Coordination of programs/partners: Describe how individualized career services are coordinated across programs/partners in the one-stop centers, including Vocational Rehabilitation, 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).

CSRC is dedicated to meeting the needs of employers and career seekers and strategically aligns our workforce system with economic development, education and the core partners required under the implementation of WIOA. CSRC collaborates with its core partners through joint agreements, MOUs and joint planning. With the implementation of WIOA, CSRC has entered into an Umbrella MOU with the required core partners which outlines how individual Individualized career services are coordinated across programs/partners in the CSRC Comprehensive One-Stop Career Center to serve the needs of individuals. In some instances, CSRC staff ensures individuals are dual enrolled in other programs to provide the services needed to attain employment and become self-sufficient. These strategies will ensure that services to customers are not being duplicated.

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

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

Basic services include assistance with filing RA claims, orientation to all services available in the one-stop delivery system, skills assessments, job search and placement assistance, referrals to workshops, labor market information, and referrals to community partners for supportive services. At each access location, individuals also receive, as appropriate, referrals to VR, the Division of Blind Services, Adult Education and Literacy, the Senior Community Service Employment Program, the CSBG and to TANF. These are core partners are co-located and/or available by Skype in our Comprehensive One-Stop Career Center. Individualized career services include comprehensive and specialized assessments and diagnostic testing, development of an individual employment plan, group and/or individual counseling and mentoring, career planning, short-term training, internships, and work experiences that are linked to careers.

WIOA Adult and Dislocated Program

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

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

Vocational Rehabilitation

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

Adult Education and Literacy Activities

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

Welfare Transition Program

Participants in the WT Program are often co-enrolled in adult education/literacy training and in WIOA to provide training opportunities, while WT provides support services. Classroom training and OJTs are also a coordinated effort between programs. WT participants who are medically deferred or have documented disabilities are referred to VR and for legal assistance to apply for SSI or SSDI.

Trade Adjustment Act (TAA)

TAA services are provided by the TAA Coordinator merit staff person employed by the Department of Economic Opportunity (DEO) in coordination with CSRC. CSRC is required to follow all policies and procedures issued by the state and federal authorities. When TAA is unable to provide services to eligible enrolled individuals, TAA partners with the WIOA program and other core partner programs to enhance the services needed to ensure the career seeker returns to employment.

Rapid Response Services

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

- 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)).**

The focus of CSRC is to develop a seamless business service delivery system that works closely with the efforts of economic development in the LWDA to deliver training and employment services. CSRC works closely with local economic development partners, local chambers of commerce, educational institutions and local businesses to better serve the needs of the employer community.

As a standard, CSRC provides a wide variety of services to employers including, posting of job vacancies, recruitment assistance, recruitment events, job fairs, labor market information, tax credit information, skills assessment and grants.

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

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

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

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)).

WIOA Youth services focuses on serving out of school youth in the LWDA. Local area high schools and local adult education programs refer youth that withdraw from school to our offices for GED services. A summer work initiative in partnership with the St. Lucie County School District with funding provided by the St. Lucie County Board of County Commissioners serves in-school youth, while WIOA Youth Services serves out of school youth. WIOA Youth services frequently works with IRSC and other public and private training institutions to provide post-secondary options for enrolled youth. WIOA youth staff are present at key college campuses (both private sector and state college) for events, workshops, and during peak registration periods to provide support for students.

CSRC staff members receive Test of Adult Basic Education (TABE) training and are certified to administer the assessment to career seekers accessing our system. This assessment assists CSRC staff in determining the need for referral to our adult education and literacy partners. CSRC's Career Centers and our local adult education and literacy programs make cross referrals and share cross-referral outcomes to support the goals of WIOA and increase student access and achievement. CSRC staff visit local adult education facilities to provide information to students and instructors about the resources available. The CSRC Business

Services Unit, in partnership with local employers, collaborates with adult education and literacy to develop career pathways for high demand careers in the LWDA.

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

Support services provided by the WT program related to transportation are gas assistance, vehicle repair, assistance with vehicle insurance (down payment) and vehicle registration. Additionally, child care is offered through the partnership with the Early Learning Coalition. Tuition assistance is available for GED and ESOL classes at IRSC as well as several approved courses of study. Uniforms, books, registration fees, and required work related equipment/tools can also be provided as supportive services through WT.

In addition, CSRC has established a relationship with the local domestic violence shelter to assist those whose safety is at risk.

CSRC follows the flexibility guidance provided by WIOA to use discretion to provide the supportive services it deems appropriate. To maximize its training dollars, CSRC provides limited support services to WIOA enrolled individuals. However, CSRC coordinates with other entities and programs offered by core partners such as TAA, WT, VR, Blind Services, CSBG, Veteran Services and community based organizations to provide needed support services.

WIOA Youth services include the ability to utilize funding to provide transportation support services for participants. These services vary, but can include: bus passes, gas cards, taxi fare, and driving permit/driver's license fees. Local transportation providers are as follows:

- Indian River County Public Transportation: The County provides free public transportation to all residents.
- Martin County Public Transportation: Youth Connections piloted a bus pass program in 2014/2015 for WIOA youth.
- St. Lucie County Public Transportation: The County permits free public transportation for youth under 18. WIOA youth over 18 are eligible for bus passes through the Youth Connections program.

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

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

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

Once the initial intake interview is completed, Career Center frontline staff develop a basic services strategy that engages the universal career seeker in basic services, as appropriate, including orientation to all services available in the one-stop delivery system, Employ Florida registration, skills assessments, job search and placement assistance, referrals to workshops, labor market information, RA benefits claims assistance, and referrals to community partners for supportive services. Individualized career services such as comprehensive and specialized assessments and diagnostic testing, development of an individual employment plan, group and/or individual counseling and mentoring, career planning, and training are also available. When frontline staff identify that a career seeker will benefit from individualized career services, the career seeker is referred to a WIOA Career Planner to receive enhanced services, or the individual is referred to enhanced services provided by VR or the Division of Blind Services as appropriate.

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

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

The providers of adult education and literacy for the LWDA are represented on the LWDB 20 Board of Directors. They actively participate on the Youth Council and the Programs and Services Committees. Information is shared at these meetings to address service gaps, leverage resources and improve effectiveness. MOUs are in place with the two (2) providers

of these activities and services in the LWDA, IRSC and the Indian River County School District. The purpose of these MOUs are to collaboratively partner for providing adults with the knowledge and skills they need to enroll and be successful in post-secondary education, to increase credential attainment and to improve their career options. For those individuals where English is their second language, the purpose is to improve their English speaking and writing skills to improve their academic skills so they can earn a high school credential and/or enter post-secondary education to improve their career options and credential attainment. Indian River State College and the Indian River County School District do not submit applications to CSRC for adult literacy and English as a Second Language (ESOL) programs. As agreed upon in the MOUs, referrals are made through the partnership for individuals who are in need of adult education, literacy and ESOL. Both of these partners are also on the CSRC ETPL.

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

CSRC staff members receive Test of Adult Basic Education (TABE) training and are certified to administer the assessment to career seekers accessing our system. This assessment assists Career Center staff in determining the need for referral to our adult education and literacy partners. Career Centers and local adult education and literacy programs make cross referrals and share cross-referral outcomes to support the goals of WIOA and increase student access and achievement. CSRC staff visit local adult education facilities to provide information to students and instructors about our resources. The CSRC Business Services Unit, in partnership with local employers, collaborate with adult education and literacy to develop career pathways for high demand careers in the LWDA.

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

- 7. Reduction of Welfare Dependency: Describe how the local board coordinates workforce investment activities to 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.**

Welfare Transition Program

Participants in the WT Program are often co-enrolled in adult education/literacy training and in WIOA to provide training opportunities, while WT provides support services. Classroom training and OJTs are also a coordinated effort between programs. WT participants who are medically deferred or have documented disabilities are referred to VR or the Division of Blind Services and for legal assistance to apply for SSI or SSDI.

Supplemental Nutrition Assistance Program (SNAP)

SNAP participants may be dually enrolled in the WIOA Adult/Dislocated Workers and/or Youth services programs to receive education and training opportunities. Participants are referred to community partners for adult education/literacy training, legal assistance, and housing. Participants in the SNAP program are provided with assistance for transportation costs related to participation through the Food Stamp Reimbursement (FSR) program.

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

As a strategy, CSRC implemented to meet CareerSource Florida's goal of reducing welfare, CSRC applied for and received a Pathways to Prosperity Grant. This grant and the project is described in detail in the Analysis of Need and Available Resource section of this plan, specifically item number four (4).

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

A MOU for LWDA's Comprehensive One-Stop Career Center was developed between CSRC, the Workforce Consortium of the Treasure Coast and the Required Partners which became effective January 1, 2018. As part of the WIOA implementation with core partners and in developing CSRC's Comprehensive One-Stop Career Center, the following WIOA required and core partners were included: 1) WIOA Adult, Dislocated Worker, Youth Programs and Youth Build, 2) MSFW Program, 3) Wagner-Peyser Act services, 4) TAA activities, 5) Jobs for Veterans State Grant, 6) CSBG employment and training activities, 7) Programs authorized under Florida unemployment compensation laws, 8) TANF, 9) Adult Education and Literacy activities authorized under title II of WIOA, 10) VR Program, 11) Career and Technical Education Programs authorized under the Carl D. Perkins and Technical Education Act of 2006, 12) Division of Blind Services, (13) Senior Community Service Employment Program. Two (2) of the required core partners in the CSRC LWDA, the Department of Housing and Urban Development (HUD) and the Programs authorized under sec. 21 of the Second Chance Act of 2007, have provided documentation to CSRC that they do not carry out employment

and training activities in the LWDA. Through the CSRC Comprehensive One Stop Career Center, these programs and their providers will ensure that employers and career seekers become a shared client base across the core programs for the purpose of providing access to information and services that lead to career pathways and positive employment outcomes.

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

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

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

DESCRIPTION OF THE LOCAL ONE-STOP SYSTEM

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

CSRC develops and maintains a seamless system of integrated services that assures career seekers and employers have access to a comprehensive array of services and supports. CSRC works closely with mandated partners and other local stakeholders to coordinate the

delivery of the services that are needed. Mandated partners are represented on the LWDB 20 Board of Directors and actively participate in committees of LWDB 20, cross-referrals, attendance at community-wide events and partner information sharing meetings are held to address service gaps, leverage resources, and improve efficacy.

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

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

All required partners under WIOA, with two exceptions, were engaged in the process of developing the Umbrella MOU for the Comprehensive One-Stop Career Center and the addendums that detail each respective organization's programs and services, as well as their financial contributions to the Comprehensive One-Stop Career Center under the IFA. Each of these core partners participated in a planning meeting to discuss the WIOA implementation of the Comprehensive One-Stop Career Center. The LWDB 20 One Stop Operator scheduled additional planning meetings with each partner to finalize the logistics of service delivery in the Comprehensive One-Stop Career Center. Each partner will also participate in a cross training for all staff and partners of the Comprehensive One-Stop Career Center to ensure all staff and partners are aware of and familiar with the array of available programs and services.

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

b. Identify any non-required partners included in the local one-stop delivery system.

In addition to the mandatory WIOA partners, CSRC recognizes the importance of regional strategic planning and fully participates as a key member in numerous community-wide initiatives to build regional capacity and implement positive change. These initiatives were well received by the community, cemented partnerships between workforce, education,

government and business and paved the way for future endeavors. Some examples of collaboration with public and private partners include:

- The Workforce Readiness Taskforce
- The Green Collar Task Force, a collaboration of representatives from St. Lucie County, CSRC, a consortium of eight trade unions and a green-collar building/construction jobs apprenticeship project was developed for the LWDA. The Green Collar Task Force and the apprenticeship programs offered through the project are still in operation training new and employed workers to meet the future labor needs of green technology businesses within the LWDA
- The Pathways to Prosperity, Sector Strategy and Community Based Sector Strategy Grants
- Partnerships were created with local foster youth agencies, Hibiscus House and Children's Home Society, to assist youth who would age out of foster care prior to self-sufficiency. CSRC provides support, training and work experience opportunities for youth aging out of foster care

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

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

- 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)).**

ATTACHMENT – see ATTACHMENT E (MOU for the Comprehensive One-Stop Career Center)

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

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

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

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

- Website access at www.careersourcerc.com provides information about services and easy entry to the Employ Florida. The website is updated frequently providing current employment news and information.
- LinkedIn
- Facebook
- Printed media, news releases, flyers and brochures
- Career fairs and events
- Community meetings and partnerships

Career services are provided to all career seekers regardless of program eligibility. Basic, individualized, follow-up and training services are provided to career seekers based on need. Specialized customer groups vary in need; outreach and services are adjusted accordingly. Universal career seekers are invited to use the resource room self-services. Frontline staff, to include core partner staff at the CSRC Comprehensive One-Stop Career Center, in the resource rooms provide information about the programs offered through the system. Computers are user friendly and brochures provide additional information about programs and services. Information is also provided on accessing Employ Florida from outside any of the CSRC Career Centers. Career seekers may register from any computer and complete online assessments from a Career Center or from home, post resumes and conduct job searches. Employers may register, post-employment opportunities and conduct candidate searches. Career center and partner staff in the CSRC Comprehensive One-Stop Career Center provide additional levels of service including information about labor market information and targeted occupations.

To promote integration of business services delivery through the one stop system, the CSRC Business Services team works diligently to engage business customers by providing employer services, such as job fairs, recruitment events, grants and Labor Market Information. The Business Services team also provides the following to promote maximum integration of service delivery.

- Gather labor market intelligence and provide data to business services.
 - Provide information about workforce related topics and services to companies and make appropriate referrals.
 - Serve as an intermediary to other economic development activities and entities.
 - Provide feedback to business customers about regional skills gaps, program development, and evaluation of the market we serve.
 - Work with local and regional economic development professionals in business retention, and expansion activities as needed.
 - Education of business customers about CSRC's goal of advancing a sector based, business driven system.
 - Manage job orders from participating employers in job matching system.
 - Work on skills development with promotion and implementation of OJT's, Internships and Apprenticeships.
 - Assure adequate job opportunities to meet the needs of career seekers in any of the Career Centers.
- a. **Describe how entities within the one-stop delivery system, including one-stop operators and one-stop partners comply with the Americans with Disabilities Act regarding physical and programmatic accessibility of facilities, programs and services, technology and materials for individuals with disabilities, including providing staff training and support for addressing needs of individuals with disabilities. Describe how the LWDB incorporates feedback received during consultations with local Independent Living Centers on compliance with Section 188 of WIOA (WIOA §108(b)(6)(C)).**

All CSRC Career Centers are ADA compliant. Career seekers with disabilities are considered universal customers and have access to all services and programs in all centers. Customers with disabilities who require auxiliary aids and services are provided such upon request. Examples of some of the adaptive services offered are JAWS, Screen Reading Software and Magic Screen Magnification software. Also, through a MOU with VR, cross training for frontline staff at all of the CSRC Career Centers will be provided to accommodate individuals with disabilities. Through this partnership with VR, CSRC plans to increase knowledge of and involvement with, Independent Living Centers located within the LWDA.

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

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

Equitable Use

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

Flexibility in Use

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

Simple and Intuitive

- CSRC communicates important information to career seekers in English, Spanish and Creole. We also have a built in language translator on our website to accommodate career seekers of all backgrounds.
- In each access location, career seekers check in on a touch screen computer using an interactive, automated process.

Perceptible Information

- Employability workshops incorporate a variety of media. Information is presented verbally and supported by graphic presentation. Career seekers are also given handouts with information relative to the topic.

- In the resource room of each CSRC Career Center, large TVs streaming “CareerSource Research Coast Workforce TV” are strategically mounted to ensure high visibility by visitors. Workforce TV displays information about upcoming events, hot jobs, tips for career seekers and general information about the Career Center. The information on the screens is displayed graphically and closed captioned and the TV’s also have sound capabilities.

Tolerance for Error

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

Low Physical Effort

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

Size and Space for Approach and Use

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

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

CSRC provides virtual services, full service career centers, mobile career centers, and one Comprehensive One-Stop Career Center. Full-service centers are located in each county within the LWDA, and the Comprehensive One-Stop Career Center is centrally located in St. Lucie County. Through the use of mobile units and community partners in Martin and Indian River Counties, career services are made available to our northernmost and southernmost rural areas to ensure that services are provided in all reaches of the communities that CSRC serves.

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

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

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

- At all access locations, scan cards are utilized to streamline career seeker check-ins and avoid bottlenecks at the reception desk.
- Career seekers can pre-register for hiring events and employability workshops on the CSRC website.
- Formal referral process utilizing Google applications to track client referrals to/from all partner programs.
- Assessment workshops offered daily in each location to determine career seekers' transferable skills and skill gaps.
- WP Staffing Specialists cross trained to provide WIOA Adult Basic Services.
- WTP Career Planners cross trained to provide SNAP case management.
- Cross training of CSRC Comprehensive One-Stop Career Center staff of all core partner programs.

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

e. 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)).

The steps that were taken to ensure there was a competitive process for the selection of a One-Stop Operator for LWDB 20 were as follows:

The LWDB 20 Board of Directors defined and approved the roles and responsibilities of the One-Stop Operator for the LWDA at their January 2017 meeting.

Subsequently, a competitive Request for Proposal procurement was approved and issued for the services, as defined, of a One-Stop Operator for CSRC on March 1, 2017 with a deadline for submission of April 7, 2017. Two proposals were received and a review committee rated the proposals on May 2, 2017. A recommendation for approval of the highest rated proposer was brought before the CSRC Executive Committee on May 12, 2017 as a voting item. The

Executive Committee unanimously approved the highest rated proposer, Career and Technical Consultants, L.L.C., at the meeting. At the full Board of Directors meeting held on May 31, 2017, Career and Technical Consultants, L.L.C. was approved as the CSRC One-Stop Operator.

CSRC entered into a formal subrecipient agreement for the One-Stop Operator of the LWDA Career Center System with Career and Technical Consultants, L.L.C. for the period of July 1, 2017 through June 30, 2018.

f. 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)).

Examples of CSRC improvement to service delivery are listed below.

- Under the Florida Trade initiative, CSRC collaborates with IRSC to fund and support the delivery of an accelerated technical training program that leads to entry-level jobs in manufacturing. The Fast Track to Manufacturing Program provides the opportunity for participants to attain the nationally recognized Certified Production Technician (CPT) certification.
- In 2017, the above mentioned fast track program has been tailored to support Florida Power & Light's efforts to recruit a skilled workforce for building two solar farms in the LWDA. Students graduating from the program are guaranteed a position as a Solar Installation Technician with the two contractors awarded the solar farm projects.
- CSRC was awarded the 2016 Veteran's Performance Incentive Award for demonstrating exemplary services to veterans beyond the requirements of the grant during the course of the program year.
- CSRC held our second Homeless Veterans Stand Down in February 2017 with 26 partner organizations participating. CSRC is in the process of planning for our third Stand Down.
- CSRC assisted QVC with the closing of their Port St. Lucie location and worked with McKesson Corporation, the company taking over the location, to hire 125 of the workers being dislocated from QVC.
- For PY2015-16 and PY2016-17, CSRC WIOA and WTP programs had no findings in the annual DEO programmatic monitoring.
- CSRC collaborated with St. Lucie Economic Development Council (EDCSLC), area businesses and educational leaders to form a Workforce Readiness Taskforce *to assess the current skills gap in three targeted industries – Health Care, Manufacturing and Construction Skilled Trades*. The EDCSLC contracted Gehant & Associates, a workforce consulting firm, to conduct the Skills Gap Study. Surveys and interviews of area businesses from each sector were completed. Through this platform, businesses were able to articulate the needed skills and associated career options to both the prospective labor force and educational institutions. The taskforce is now in the second phase of the project and will begin implementation of business driven solutions to assist in the creation and sustainability of talent pipelines to meet current and future needs of each sector.

- CSRC's WIOA Youth Program held their second annual Jobs+ Fair.
- The St. Lucie County Board of County Commissioners (SLCBOCC) increased their grant funding by \$50,000 (from \$250,000 to \$300,000) for the second annual Summer of Success Program (summer youth employment and work readiness program) due to the outstanding success of the program's first year. In partnership with Alleghany Ministries and the SLCBOCC, funding for a Summer of Success Program for June 2019 is under development.
- On January 31, 2018, CSRC in partnership with City of Fort Pierce, St. Lucie County Chamber of Commerce, St. Lucie County and EDCSLC hosted the City of Ft. Pierce Job Fair, with over 1,000 career seekers in attendance and 115 businesses and community partners present. The City of Fort Pierce Job Fair, an annual event in its 3rd year, continues to surpass the success of the prior year's event.
- As a result of demonstrated success organizing community job fairs, on November 15, 2017, CSRC partnered with Indian River County's Progressive Civic League of Gifford, Gifford Front Porch Association and Grand Harbor Community Association, Inc. to host a local job fair for the Gifford community. Attended by close to 300 career seekers and 30 businesses, the "Inaugural" Gifford Job Fair was a great success and will be an annual event in the Gifford community moving forward.
- CSRC also collaborates with the Martin County Business Development Board (BDBMC) to host a countywide career fair each spring. Planning is currently underway for the 2018 event that is scheduled on April 13, 2018.
- In an effort to help close the skills gap experienced by the Transportation & Logistics Sector of the LWDA, CSRC has partnered with the Manufacturing Skills Standards Council (MSSC) to offer industry-recognized, nationally portable Certified Logistics Associate(CLA) and Certified Logistics Technician(CLT) credentials to help prepare individuals for careers in supply chain logistics.
- Through WIOA Youth programming and innovative community-based initiatives targeting youth, CSRC responds to higher rates of poverty in special focus areas of the LWDA by applying for additional funding for programs that offer increased levels of workforce development activities for youth residing in these areas.
- CSRC collaborated with IRSC to apply for a YouthBuild Grant through the Department of Labor. The grant was awarded beginning in the Fall of 2017 and aims to enroll 50 St. Lucie County youth over a period of 24 months. CSRC is acting as a subrecipient of the grant award, providing WIOA youth services to the youth participants. The goal of YouthBuild is to bring academics, work readiness training, leadership skills and work-based learning into one comprehensive model. The project has been divided into two (2) cohorts with cohort one (1) started on January 9, 2018.
- At the request of the community at large, CSRC, through an approved training provider, implemented a pilot Pre-Apprenticeship Program during the 2016-2017 Program Year. The pilot Pre-Apprenticeship was funded through the WIOA Youth/Adult programs and targeted the hard to serve youth/adults who were at least 18 years of age. Gang involved youth and young adults from neighborhoods targeted by the community as at risk participated. Of the 19 participants that began the Pre-Apprenticeship in October of 2016,

12 completed the program, earning the credentialing offered. Follow-up services to date report the following:

Ten (10) of the participants are employed; three (3) dropped out; one (1) is not locatable; three (3) are incarcerated; one (1) is out of state and unemployed; one (1) is enrolled in a Registered Apprenticeship Program.

- CSRC applied for and received four (4) 17-18 State-Level Discretionary Strategic Initiatives Funding Grants. The first grant awarded is classified as a Community Based Sector Strategy and is for the Healthcare industry. Two (2) of the grants are classified as Pathways to Prosperity and are for a Pre-Apprenticeship and Demonstration Project (2Gen-F.A.T.E.S). The fourth grant is classified as a Community Based Sector Strategy and is for creating a Registered Apprenticeship Program in the Manufacturing Industry. Specifics of these grants are outlined in the Analysis of Need and Available Resources Section of this updated plan, item number four (4).

DESCRIPTION OF PROGRAM SERVICES

- 1. System description: Describe the local workforce development system. Identify programs included in the system and how the local board works with each entity to carry out core programs and other workforce development programs supporting alignment in provision of services. Identify programs of study authorized under the 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)).**

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

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

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

improved outcomes and excellent customer experiences for both employers and career seekers.

CSRC employs universal design principles in the operations of the career centers to facilitate access to include partner programs and community based organizations who serve individuals with barriers/obstacles to employment. CSRC staff and core partner program staff in the Comprehensive One-Stop Career Center, who interface with career seekers, are cross-trained on all core programs and are familiar with the resources and support services provided by community organizations. This strategy facilitates co-enrollment in programs, the development of career pathways and improves access to activities that lead to post-secondary and industry recognized credentials. Registered Apprenticeships are promoted as growth opportunities.

CSRC considers business as the primary customer of the LWDA. The CSRC service delivery is employer driven and integrates economic development and educational partners within the LWDA. CSRC's goal is to prepare a skilled workforce for existing and emerging in-demand occupations in order to meet the employment needs of business in the LWDA.

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

IRSC and the Indian River County School District Center for Career and Technical Education carry out 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)) in CSRC's local workforce development area. Both of these entities are CSRC approved training providers who have submitted applications and meet the requirements as outlined under WIOA and CareerSource Florida Policy # 90. As required, the programs of study authorized under Carl D. Perkins must align with CSRC's Regional Demand Occupations List in order for Individual Training Accounts (ITAs) to be issued for WIOA eligible career seekers.

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)).

Contracts for \$100,000.01 or more can only be initiated through competitive proposal procedures. These formal procurement processes requiring the development of a RFP, review and/or rating of proposals and the awarding of a contract.

The formal procurement process requiring a proposal is initiated by employees or LWDB 20 Board members who identify a need. Costs are researched (cost estimate) immediately to determine the approximate market cost of the service.

Competitive RFPs are developed according to established procedures approved by the LWDB 20 Board of Directors. The President/CEO monitors procedures to ensure they are followed when procuring service providers. The LWDB 20 Board of Directors approve all RFPs before they are issued. The final selection of a service provider rests with the LWDB 20 Board of Directors.

Public advertisements are placed on the CSRC's website. When it is advantageous to stimulate greater competition among proposers, advertisements may be placed in publications serving a greater geographical region. Announcements of RFP's are communicated to potential service providers contained on the CSRC service provider list and those organizations, which CSRC employees and/or LWDB 20 Board members believe may be potential providers who may not be contained on the inventory of potential service providers.

If fewer than three responses are received and there is sufficient time before the good or service is needed, CSRC may attempt to obtain additional responses. After a public solicitation, if only one bid is received, it will be evaluated under the rules governing sole source purchases and a cost analysis performed.

Proposals are rated by CSRC employees and LWDB 20 Board members designated by the President/CEO and/or the LWDB 20 Chairperson to be members of the rating team. Each rater receives copies of the proposal, the rating sheet and any other evaluative or historical information pertaining to the service provider or the procurement.

Proposals are rated first individually by each rater. At a specified meeting, all raters present and discuss their evaluation of the proposals and all proposals are ranked according to average scores.

The LWDB 20 Board of Directors or the committee who originally reviewed the RFP hears the rating team's recommendations, selects a potential service provider and sends that recommendation to the LWDB 20 Board of Directors. The recommendation includes documentation of need, specific procedures to meet the need, time limits for the service, competencies/benchmarks established, reasonableness of cost and the type of contract recommended. The LWDB 20 Board of Directors reviews all recommendations and evaluations and votes it approval or rejection.

If approved, CSRC employees negotiate the terms of a contract and prepare the contract, either cost reimbursement or fixed price, for signature. Contracts may be signed by the President/CEO or authorized designee.

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

In order to expand eligible career seekers access to training and activities that lead to a career path, cross training of frontline staff is essential. CSRC frontline staff have been cross-trained to understand the services, resources and eligibility requirements of all programs. Frontline WP team has also been cross trained to provide WIOA Adult Basic Services. For the implementation of WIOA with the core partners, all CSRC and core partner staff in the Comprehensive One-Stop Career Center have been scheduled for cross training for the purpose of understanding the services, resources and eligibility requirements of all the available programs and services. The initial training will consist of two (2) phases. Subsequent training will follow at least bi-annually.

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

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

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

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

with the core partners, CSRC, VR and the Division of Blind Services have established business relationship teams that work together to serve employers.

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

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

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

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

All employer training is concentrated on industry sectors in demand for the LWDA: Healthcare; Manufacturing; Construction Trades; & Logistics and Distribution. Classroom training and Apprenticeship programs are provided for occupations in demand and for those occupations which exhibit job growth.

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

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

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;
 - i. Describe how the local area transforms services delivered to job-seekers/workers and employers through sector strategies; and
 - ii. Describe how the local area measures, improves and sustains sector strategies.

Responses to (5) (a-d) (i, ii) are defined below:

CSRC combines labor market analysis from CHMURA Economics & Analytics and The Conference Board Help Wanted Online with input from area industry leaders to identify target sectors. Using high quality data and the reported industry labor market activity, the sectors identified include: healthcare, construction trades, and manufacturing. To ensure that education and training opportunities stay aligned with the needs of the labor market CSRC uses a similar framework for identifying in-demand occupations. According to the

data, the outlook for occupations in the three sectors is very strong, especially as the career seeker progresses in a career pathway.

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

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

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

As a result of the study, CSRC formed a Workforce Readiness Taskforce by convening economic development agencies, educational providers and industry leaders representing the sectors in demand. The mission of this industry led taskforce is to organize processes and leverage resources to support a focused sector-based talent development pipeline to meet the needs of employers and career seekers for the LWDA. The taskforce aims to establish a talent development system that will enhance the LWDA's ability to attract and retain businesses by creating career pathways for its residents to meet the needs of targeted industry sectors.

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

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

The Workforce Readiness Taskforce seeks to:

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

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

As a creative strategy, CSRC has formed a strategic sector development division to pursue financial resources to help employers in establishing new apprenticeships, OJT and to support and sustain sector driven initiatives. CSRC also hosts at least one industry-specific job fair onsite in each of the Career Centers each month.

CSRC has better aligned services delivered to career seekers and employers by emphasizing work based learning as a priority to support sector strategy implementation. CSRC understands that work-based training is an important service for career seekers as it teaches job-specific skills and can directly connect job seekers to job opportunities.

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)).

CSRC utilizes strategic planning in partnership with education, economic development, local employers and training providers to analyze and apply workforce intelligence to ensure that all training provided is in support of in demand industry sectors.

Through collaboration with other LWDA's, CSRC safeguards that the training provided in the LWDA is linked to local and regional in-demand industry sectors and/or occupations, thus ensuring that for participants, willing to relocate, their training reflects the skill sets needed for occupations in demand.

CSRC recognizes Florida's Demand Occupational List and quarterly establishes a minimum level of projected openings by occupation for training to be considered in LWDA RDOL.

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

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

As a creative strategy, CSRC has formed a strategic sector development division to pursue financial resources to help employers in establishing new apprenticeships, OJT learning and to support and sustain sector driven initiatives.

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

7. Employer Engagement: Describe strategies and services used in the local area to: Facilitate engagement of employers, including small employers and employers in in-demand industry sectors and occupations, in workforce development programs;

Employer engagement in the LWDA is facilitated by the Business Services Unit who works diligently to educate business customers by providing information on financial incentives, cost savings and other advantages of using CSRC programs and services. The Business Services Unit reaches out to businesses through contact lists developed from participation at job fairs, business development events, economic development activities, human resource associations, local area chambers of commerce and economic development efforts. CSRC leverages these relationships to provide value-added services to identify the skilled human capital that meets the workforce needs. These services may include: OJT, IWT, EWT, internships, apprenticeships and customized training provision for in-demand jobs or high growth industry sectors within the LWDA.

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

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

- Recruitment and pre-screening of qualified applicants.
- Easy access to post job listings through Employ Florida.
- Information about job and industry growth trends and forecast information.
- Wage data and other valuable labor market information.
- Hiring and training incentives.
- A single point of contact to discuss training and hiring needs.

- Mapping of the talent pipelines for various sectors to identify where the talent is needed now, and in the future.
- Increasing the quantity and quality of the workforce talent pool for the LWDA by defining career pathways for career seekers that will ensure a continuous supply of qualified talent.
- Communication of the in-demand skills needed by high growth industry sectors to educational and training organizations in order to improve responsiveness and better prepare workers for the sector.
- CSRC facilitates a very active business services team that proactively offers services to employers to meet the workforce needs of the LWDA. These services are aimed to provide job listings, job referrals, OJT to the RA claimant applicant pool.

b. Better coordinate workforce development programs and economic development;

The Vice President for Strategic Development oversees the overall direction, planning and implementation of CSRC's strategic business solutions initiatives. The Vice President for Strategic Development proactively develops community stakeholder awareness to identify and support shared workforce development priorities and collaborative opportunities. This position serves as a liaison with Economic Development Organizations, Industry Associations and other local area stakeholders. The Vice President for Strategic Development is responsible for strategically building CSRC's fee-for-services initiatives to increase unrestricted funding revenue by expanding mutually beneficial collaborations with industry, education, community partners, government and other applicable institutions.

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

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

8. Priority 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.

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

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

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

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

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

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

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

Individual Training Accounts (ITA)

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

| Tier | Average Wage | Maximum ITA Investment |
|--------|--------------------------|------------------------|
| Tier 1 | \$13.00 – 15.00 per hour | Up to \$3,000 |
| Tier 2 | \$15.01+ per hour | Up to \$4,000 |

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

On The Job Training (OJT)

OJT is paid subsidized job skill training that is provided by an employer during the initial term of employment through an OJT contract between employer, CSRC and the employee. The OJT is designed to ensure the WIOA participant acquires the employer specific job skills necessary to secure and maintain employment. The training is limited in duration as appropriate to the occupation for which the participant is being trained and is not to exceed six (6) months.

Employed Worker Training (EWT)/Customized Training

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

Apprenticeship

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

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

Internship

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

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

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

CSRC staff utilizes Labor Market Information to include tools such as Help Wanted OnLine and Employ Florida to assist career seekers in making informed career choices.

CSRC ensures that staff informs career seekers of customer choice when it comes to selecting training programs and training providers. CSRC WIOA team members work one-on-one with career seekers during the application and career planning process to inform them about training program eligibility, requirements to complete the training, length of training programs, cost of the training and outcomes.

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

CSRC's WIOA Youth program employs a variety of academic, skills and interest assessments to assist enrolled youth in determining the most opportune career pathway. Youth receive in-depth career mentoring by Youth Program staff. Innovative tools, such as virtualjobshadow.com and mycareershines.com, are offered as additional career exploration opportunities for youth. Youth are presented with options for training and work-based learning activities, based on their individual assessment results that coincide with their schedule/life obligations (schooling, caring for children or family members, and transportation issues). Youth are also presented with information regarding the RDOL and local ETPL to assist in making career pathways choices that will lead to self-sufficiency.

WT clients are assessed from the time of intake and ongoing until the case closes. The initial assessment process identifies a participant's experience, education and interests based on their feedback. An Individual Responsibility Plan (IRP) is developed utilizing the assessment information in addition to the participant's input during a face-to-face appointment with the WT Career Planner. The IRP has a Career Goal reflecting the participant's future interest. If the participant expresses an interest in training, the assessment and IRP are reviewed to ensure it is in line with what is being requested. At that time, the participant will also be required to complete an assessment packet specifically focused on training. An interest inventory will be administered, as well as the TABE, to ensure suitability and capability.

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

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

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

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

a. Describe any ITA limitations established by the board;

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

- Advanced Manufacturing
- Healthcare
- Construction Trades
- Logistics and Distribution

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

| Tier | Average Wage | Maximum ITA Investment |
|--------|--------------------------|------------------------|
| Tier 1 | \$13.00 – 15.00 per hour | Up to \$3,000 |
| Tier 2 | \$15.01+ per hour | Up to \$4,000 |

b. Describe any exceptions to the use of ITAs.

All Title I Adult and Dislocated Worker training services in the LWDA are provided through the use of ITAs with the exception of OJT, EWT, Internships or other Work Activities.

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

CSRC utilizes employer driven service delivery strategies that integrates economic development and educational partners within our workforce system to meet the needs of all employers in the LWDA and to promote entrepreneurial skills training for the creation of new

businesses/new employment opportunities. CSRC embraces special projects and initiatives that addresses special industry needs and develops stronger ties with the business community.

In partnership with the largest educational training provider, IRSC, CSRC has provided EWT and customized training opportunities to offer employee development and training programs for local businesses. As specific needs of local employers and industries have been identified, CSRC and IRSC have worked together to best meet those needs. An example is the curriculum development and customized training created to meet the need of our hospitality industry employers. Under WIOA, CSRC will expand our partnerships with training providers, apprenticeship programs and industry associations.

In support of entrepreneurship in the LWDA, CSRC, Bank of America and Florida Accelerator in partnership with the City of Port St. Lucie, St. Lucie County Chamber of Commerce, St. Lucie Public Schools, Veterans' Pathway to Business Success and the EDCSLC hosted the 2016 Business Opportunity Forum. Entrepreneurs, start-ups, and local high school students had the opportunity to present their ideas and strategies on owning a business for the purpose of making connections and possibly receive funding for their projects. Several projects did receive funding from investors. Eight (8) local youth participants were recognized as "Rock Star Entrepreneurs" while four (4) took home the title of "Innovative Business Model". Each of the four (4) youth participants were awarded \$1,000.

Each year CSRC, in partnership with local Chambers of Commerce, the Treasure Coast Human Resource Association and many other sponsors presents The Best Places to Work Event. This is a national program that was developed to provide a confidential forum for local employers to participate in an evaluation of various local workplace best practices and programs. It provides an opportunity for employers to compare themselves to others of a similar size and serves as a valuable tool for business and human resource planning. CSRC hosts two (2) events where employers attend a sponsored luncheon and receive recognition and awards for their best practices in the categories of employers with under fifty employees and employers with over fifty employees. There is no cost to the companies who participate.

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

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

CSRC intends to encourage career seekers to utilize apprenticeship programs as a career pathway to high demand, high wage occupations that are needed in the LWDA. CSRC has identified the critical need for skilled labor in the areas of construction trades and manufacturing and recognizes that apprenticeship programs are a key job-driven strategy for employers and industries.

Career seekers will be made aware of registered apprenticeship opportunities through media campaigns involving news releases, flyers and brochures, community meetings, presentations and partnerships with faith and community based organizations. Registered apprenticeship opportunities will be showcased on the CSRC website and be listed on the local ETPL. All CSRC and Partner team members will be educated about the opportunities apprenticeship programs can provide to career seekers. A specific referral system will be implemented for apprenticeship programs where employers and/or apprenticeship training providers can refer individuals to the CSRC Career Center system, who are seeking apprenticeship, to be considered for sponsorship for an ITA and/or OJT. Likewise, career seekers, who are eligible under WIOA, will be referred to local apprenticeship programs.

Through an ARRA grant award, CSRC established The Green Collar Task Force. (a collaboration of representatives from local government, CSRC and eight (8) trade unions) A green collar building/construction jobs apprenticeship project was developed. The task force and the registered apprenticeship programs are still in operation training new and employed construction/trade workers to meet the current and future labor needs of these businesses within the LWDA. CSRC has held several meetings with the task force apprenticeship programs to make them aware of the support WIOA provides to career seekers for placement into registered apprenticeship programs.

CSRC is working with industry representatives and local businesses to develop registered apprenticeships, in collaboration with apprenticeship training representatives from DEO and other partners, including educational partners. CSRC applied for and received two grants under the State Level Discretionary Strategic Initiatives Funding for apprenticeship training programs. In the LWDA, manufacturing-related employment continues to outpace the supply of skilled, qualified labor. Through these two grants, CSRC will address the shortage of skilled manufacturing workers by developing a Registered Apprenticeship and a Pre-Apprenticeship for the Manufacturing industry. The Pre-Apprenticeship program will prepare students for entry into the registered Apprenticeship program or facilitate their transition into jobs in the manufacturing industry. The Registered Apprenticeship program will equip completers with the skills and credentials to fill existing employment gaps, as well as the impending worker shortage in three (3) sub-sectors of manufacturing: Aircraft, Marine and General Production. On December 5, 2017, CSRC hosted the Florida Department of Education Apprenticeship Office, CareerSource Florida representatives and Florida Training Services to guide area manufacturer employers on the steps necessary to develop and register a Manufacturing Apprenticeship and a Manufacturing Pre-Apprenticeship Program, a Career Pathway Program in the LWDA.

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).

CSRC has worked diligently to meet the needs of local business and will continue to do so by strategically using various training programs.

On The Job Training (OJT)

CSRC provides a value added proposition for area employers to hire and train new employees. OJT allows CSRC to meet particular needs of specific employers in an efficient and cost effective manner.

Incumbent Worker/Customized Training Programs

CSRC provides grants to employers to reimburse the costs associated with skills upgrade training for full-time employees of the company. The programs help businesses to:

- Provide training and education for current workers
- Improve employee productivity
- Reduce employee turnover
- Increase business competitiveness

Internships

CSRC has established short-term internships, which are subsidized employment experiences in targeted industries with occupations in demand with private, non-profit or public employers.

CSRC also continues to serve business expansion and talent development through the identification of in-demand industry sectors that align and support the development of career pathways. CSRC works effectively with business intermediaries including, economic development, local chambers of commerce and business leaders representing various industry sectors in order to support CSRC’s vision of creating a professional and efficient workforce system to serve businesses of the LWDA.

Industry and Sector Strategies Career Pathway Initiatives

Under CareerSource Florida’s sector strategy policy and their sector strategy initiatives, CSRC received three (3) grants. These grants address the lack of a skilled talent pipeline needed to meet the current and future market demands of the local manufacturing and healthcare industries. These grants are discussed in detail under the Analysis of Need and Available Resources section of this plan, specifically number four (4), under the Description of the Local One-Stop System section, specifically number five (5) and the Description of Program Services section, specifically number thirteen (13).

Business Intermediaries

CSRC collaborated with the EDCSLC, area businesses and educational leaders to form a Workforce Readiness Taskforce to assess the current skills gap in three (3) targeted industries, Healthcare, Manufacturing and Construction Skilled Trades in the LWDA. The Workforce Readiness Taskforce and the Skills Gap Study are discussed in detail under the Description of the Local One-Stop System section of this plan, specifically number five (5).

Other Initiatives:

The Welfare Transition (WT) Program has implemented the Getting Ahead curriculum to help under-resourced individuals to:

- Take charge of their lives.
- Complete a self-assessment of their own resources and make plans to build them.
- Develop a series of mental models to examine their own lives and create new future stories.
- Help stabilize their lives.
- Investigate the impact that poverty has had on themselves and their community.
- Use this information to build resources for a better life and community.

CSRC in partnership with other LWDBs, local Early Learning Coalitions and Children Services Councils applied for and was awarded funding under the Pathways to Prosperity Initiative. This F.A.T.E.S. (2Gen) project is discussed in detail under the Analysis of Need and Available Resources section of this plan, specifically number four (4).

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

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

CSRC utilizes various team members with programmatic experience to ensure that contracted service provider programs are in compliance with federal/state/local regulations and to provide technical assistance, guidance and training as needed. Contracted service providers are monitored regularly by CSRC internal team members and by our contracted monitoring firm. Any issues discovered are reported to the Vice President of Operations and any service

providers. CSRC requires contracted service providers who are found to be out of compliance with any contractual agreements, the law, and/or program regulations to complete corrective action plans. They are required to respond in writing with a Corrective Action Plan within 20 working days from the request of the LWDB 20.

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

CSRC has an established application process and quality standards for potential training providers. Applications from potential training providers are accepted throughout the year. CSRC has an Eligible Training Provider List Policy, approved by the LWDB 20, which details the approval process to become an eligible training provider for our local area. CSRC has developed an Occupational Skills Training Provider Agreement for eligible providers. The Agreement requires that all training providers submit performance information on a semester/term basis as well as cost information on an annual basis or as costs change.

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

- % of participants who completed the program - 75%
- % of participants who completed the program and obtained employment - 85%
- % of participants who complete training and obtain unsubsidized employment and who are retained fourth quarter after exit– 90%
- % WIOA participants who complete the training and obtain an industry recognized credential or a degree – 90%

The Training Provider Score Card is available on the CSRC website for review by customers interested in training opportunities and updated on a semester/term basis.

Complaints from participants or the community regarding the performance of a training provider are addressed initially by administrative staff. Staff contacts the training providers, via a telephone or on-site visit, to verify facts. Staff may request a corrective action plan, if the complaint is validated. If staff is unable to resolve the complaint with the training provider

and the participant, the complaint is elevated to the Programs and Services` Committee of the LWDB 20 for resolution.

At any time during the year, staff can make recommendations to the Programs and Services Committee of the LWDB 20 to cease training for occupations that have resulted in over-training and/or when there is a decline in job openings. The actions of the Committee are regularly reviewed and approved by the full LWDB 20.

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

The following WIOA Youth program elements are made available to each youth during the program. These are independently driven by the participants needs. Any service needed will be identified in the Individual Service Strategy.

| WIOA Required Youth Program Elements | Provider, or Referral Agency | Instructional Activities/Curriculum |
|--|---|---|
| Tutoring, academic remediation; study skills training, and instruction leading to secondary school completion, including dropout prevention strategies | CSRC / Public school partners | Computer based training/instructor facilitated, FCAT and GED Practice, GED Prep materials, Practice GED exams, and an instructional teacher-aided tool that is also used as a one-to-one instructional resource with minimal guidance. (online) |
| Alternative secondary school offerings | CSRC/ Public school partners | Florida Sunshine State Standards |
| Paid and unpaid work experiences, including internships and job shadowing | CSRC/ Community Business partners, CBO's, FBO's | Documented Work Experience activities |
| Occupational skills training | CSRC / Approved Training Provider Partners | Various. Based on identified occupations/career fields on the Targeted Occupations List with approved training providers |
| Workforce Concurrent Education | CSRC and/or community agencies | Independently driven by participant needs. Partnership with post-secondary and local training providers and employers to encourage youth to see education as part of their career pathway |

| | | |
|--|--|--|
| Leadership development opportunities, including such activities as positive social behavior and soft skills, decision making, teamwork, etc. | CSRC in connection with various community partner agencies and employers | Employability skills, life skills curriculum that includes leadership development, health, nutrition, sexual behavior, and substance abuse prevention |
| Supportive Services | CSRC in connection with various partner agencies and/or employers | Independently driven by participant needs. Supportive services for educational training and employment activities such as gas cards, bus passes, uniforms, background checks and childcare. |
| Adult mentoring for at least 12 months | CSRC in connection with partner agencies and employers | Independently driven by participant needs. Case managed and documented. |
| Follow-up services no less than 12 months after exit | CSRC | Independently driven by participant needs. Contact with employer, post-secondary entities, job retention coaching, academic support, incentives, support, career and education counseling. (Continuous service until participant has completed follow-up period of 12 months). |
| Comprehensive guidance and counseling | CSRC and/or community agencies | Ongoing intensive case management. Community/locally based programming. |
| Financial Literacy | CSRC in connection with partner agencies | Independently driven by participant needs. Partnerships with local banks and financial planning partners |
| Entrepreneurial Skills Training | CSRC and/or community agencies | Independently driven by participant needs. Partnerships with small business development, banking and financial institutions. |
| Labor Market and Local Employment Information | CSRC | Independently driven by participant needs. Using local workforce system access, ongoing career pathway discussions to include LMI and local career opportunities |
| Post-Secondary Transition Services | CSRC and/or community agencies | Independently driven by participant needs. Partnerships with post-secondary and local training providers to support youth into higher education |

With the cooperation and commitment of each participant and their family whenever possible, staff will develop an Individual Service Strategy (ISS) and determine barriers to each participant's success. The TABE will be used to ascertain standardized Reading and Math grade levels, if needed. Other work readiness and career interest assessments will be used. The staff and participant will work together to develop a personalized ISS plan.

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

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

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

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

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

- a. **Define the term “a youth who is unable to compute or solve problems, or read, write, or speak English at a level necessary to function on the job, in the individual’s family, or in society.” 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).**

CSRC's WIOA Youth program defines “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” by TABE score levels, with a score in either reading or total math below a 9.0 meeting the qualifications for this barrier. CSRC's WIOA Youth program, also will accept ELL/ESL students under this barrier for in-school youth or out-of-school youth that were assigned to ELL/ESL programs during their last school year attended.

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

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

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

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

17. Please include the following attachments with your local plans:

- a. Executed Memoranda of Understanding for all one-stop partners.
Attachment F - Authority and Signature Form
- b. Executed Infrastructure Funding Agreements with all applicable WIOA required partners.
N/A at this time per guidance from CareerSource Florida at the February 14, 2018 Board of Directors meeting.

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)).**
- 3. Provide a description of the process used by the board to obtain input and comment by representatives of businesses and labor organizations for the development of the plan (WIOA §108(d) (2)).**
- 4. Describe efforts to coordinate with other workforce partners to obtain input into the development of the plan.**
- 5. Include, as an attachment with the plan to the Governor, any comments expressing disagreement or offering recommendations for continuous improvement, the LWDB's response to those comments, and a copy of the published notice (WIOA §108(d)(3)).**

Responses to questions 1-5:

To ensure public comment and input into the development of the local plan, a full draft copy of the CareerSource Research Coast 2-year Plan update plan was posted on the CSRC website on February 28, 2018 for 30 days. Instructions were given for reviewing the plan and providing comments. The draft plan was legally noticed in the LWDA's local newspaper publications on February 28, 2018. The draft plan was also reviewed by the Executive committee, in an open public meeting advertised to the public between February 28, 2018 – March 28, 2018. Members of the LWDA's economic development organizations, private business, labor organizations, local education providers and community partners are members of the LWDB 20 Board of Directors and were provided opportunities at these meetings to offer input into the plan. The local draft plan was also reviewed by the Treasure Coast Workforce Consortium in a publically noticed meeting on March 28, 2018. No additional comments were received and the CareerSource Research Coast 2-year Plan update was approved by the LWDB 20 Board of Directors and the Treasure Coast Workforce Consortium at their respective meetings held on March 28, 2018.



SIGNATURE PAGE

This plan represents the efforts of CSRC to implement the Workforce Innovation and Opportunity Act in the following counties:

- Indian River
- St. Lucie
- Martin

We will operate in accordance with this plan and applicable federal and state laws, rules, and regulations.

The Workforce Development Board of the
Treasure Coast, Inc.
d/b/a CSRC

Robert Cenk, Chair

Signature

3/28/18

Date

Treasure Coast Workforce Consortium

Frannie Hutchinson, Chairman

Signature

3/28/18

Date



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

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

WITNESSETH:

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

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

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

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

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

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

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

**JOSEPH E. SMITH, CLERK OF THE CIRCUIT COURT
SAINT LUCIE COUNTY**
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RECORDING: \$61.00

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

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

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

NOW, THEREFORE, the parties hereto agree as follows:

1. Repeal of Existing Interlocal Agreements

Any and all prior existing interlocal agreements establishing the Treasure Coast Workforce Consortium and the Workforce Development Board of the Treasure Coast between the parties and Okeechobee County are hereby repealed upon the effective date of this Agreement.

2. Establishment of Treasure Coast Workforce Consortium

There is hereby established a multijurisdictional arrangement (hereinafter called the "Treasure Coast Workforce Consortium") among all the parties hereto for the express purpose of collectively carrying out the individual responsibilities of each party to this Agreement under the WIOA. The Treasure Coast Workforce Consortium shall consist of three (3) members. The Chairman of the Board of County Commissioners of each county shall serve as his/her County's representative on the Treasure Coast Workforce Consortium; however, provided that any such Chairman of a Board of County Commissioners may designate another member of his/her County Commission to attend meetings of the Treasure Coast Workforce Consortium on his/her behalf, and any such designated member of a County Commission shall have full voting rights and privileges.

3. Identification of Parties to this Agreement

Each of the parties to this Agreement is a county of the State of Florida, and as such is a general purpose political subdivision which has the power to levy taxes and spend funds, as well as general corporate and police powers. The governing body of each of the parties to this Agreement is its Board of County Commissioners and each party to this Agreement is identified as follows:

| <u>Name</u> | <u>Address</u> |
|---|--|
| Board of County Commissioners Indian River County, Florida | 1801 27 th Street Vero Beach, FL 32960 |

| | |
|-------------------------------|-------------------------|
| Board of County Commissioners | 2401 S.E. Monterey Road |
| Martin County, Florida | Stuart, FL 34996 |

| | |
|-------------------------------|-----------------------|
| Board of County Commissioners | 2300 Virginia Avenue |
| St. Lucie County, Florida | Fort Pierce, FL 34982 |

4. Geographical Area to be Served by this Agreement

The geographical areas which will be served by this Agreement are the entire geographical areas of each of the three (3) member counties, which geographical areas are legally described in Chapter 7, Florida Statutes, and for purposes of this Agreement, shall be known as the Treasure Coast.

5. Size of Population to be Served

The population of the three county area to be served by this Agreement is 571,821 based upon the population projections for 2014 prepared by the Florida Department of Economic Opportunity, Bureau of Labor Market Statistics.

6. Agreement Not Prohibited by Law

This Agreement is not prevented by State or local law from taking effect in the entire geographical area which it intends to serve.

7. Responsibilities of Treasure Coast Workforce Consortium

The parties to this Agreement hereby authorize the Treasure Coast Workforce Consortium:

(1) to appoint the members of the Workforce Development Board of the Treasure Coast, in accordance with Section 107 of Title I of the WIOA and Section 9 of this Agreement, which shall serve the functions described in Section 107 of Title I of the WIOA; and

(2) to enter into an agreement or agreements with the Workforce Development Board of the Treasure Coast, herein named WIOA grant recipient and administrative entity for the development of the WIOA plan as described in Section 108 of Title I of the WIOA; and

(3) to review and approve all WIOA plans prepared under Section 108 of Title I of the WIOA and jointly submit, along with the Workforce Development Board of the Treasure Coast, said plans to the Governor; and

(4) to perform any other appropriate duties necessary for the accomplishment of and consistent with the purposes of this Agreement and the WIOA.

8. Quorum and Voting

At all meetings of the Treasure Coast Workforce Consortium, the presence in person of a majority of the whole Treasure Coast Workforce Consortium shall be necessary and sufficient to constitute a

quorum for the transaction of business. At all meetings of the Treasure Coast Workforce Consortium at which a quorum is present, all matters shall be decided by the vote of a majority of the members of the Treasure Coast Workforce Consortium.

9. Establishment, Composition, and Appointment of the Workforce Development Board

There is hereby established a Workforce Development Board, which shall be constituted in accordance with the requirements of Section 107 of Title I of the WIOA and this Section 9 of this Agreement (hereinafter called the "Workforce Development Board of the Treasure Coast"). The initial number of members of the Workforce Development Board of the Treasure Coast shall be twenty-one (21). Thereafter, the number of members of the Workforce Development Board shall be determined by the Workforce Development Board.

Members shall be appointed for fixed and staggered terms and may serve until their successors are appointed. After the initial staggered terms, terms of Workforce Development Board members shall be three (3) years. Any vacancy in the membership of the Workforce Development Board shall be filled in the same manner as the original appointment. Members may be reappointed for successive terms if the sponsoring organization agrees. Any member of the Workforce Development Board may be removed for cause in accordance with procedures established by the Workforce Development Board.

A majority of the Workforce Development Board shall be representatives of the private sector, who shall be owners of businesses, chief executives or chief operating officers of businesses, and other business executives or employers with optimum policy-making or hiring authority or who represent businesses with employment opportunities that reflect the employment opportunities of the local area.

Private sector nomination, and the individuals selected by the Treasure Coast Workforce Consortium from such nominations, shall reasonably represent the industrial and demographic composition of the business community. The Chairman of the Workforce Development Board shall be selected from among members of the Board who are representatives of the private sector.

The private sector representatives on the Workforce Development Board shall be selected by the Treasure Coast Workforce Consortium from individuals nominated by general-purpose business organizations, such as chambers of commerce, economic development agencies, business councils, and business trade organizations, as follows:

(1) All nominations to the Workforce Development Board must be the CEO, or manager or equivalent of their organization whether private or public.

(2) The education representatives on the Workforce Development Board shall be selected by the Treasure Coast Workforce Consortium from individuals nominated by regional or local educational agencies, institutions or organizations representing such local educational entities.

(3) The labor representatives on the Workforce Development Board shall be selected by the Treasure Coast Workforce Consortium from individuals nominated by local labor organizations.

(4) The rehabilitation agency representatives on the Workforce Development Board shall be selected by the Treasure Coast Workforce Consortium from the individuals nominated by local rehabilitation agencies.

(5) The community-based organization representatives on the Workforce Development Board shall be selected by the Treasure Coast Workforce Consortium from the individuals nominated by local community-based organizations.

(6) The economic development agency representatives on the Workforce Development Board shall be selected by the Treasure Coast Workforce Consortium from the individuals nominated by local economic development agencies.

(7) The one-stop representatives on the Workforce Development Board shall be selected by the Treasure Coast Workforce Consortium from individuals representing one-stop partners.

(8) Other individuals or representatives of other entities may be included as the Workforce Development Board may determine to be appropriate and are so appointed by the Treasure Coast Workforce Consortium.

10. Workforce Development Area Designation.

Pursuant to the designation by the Governor, the three (3) counties constituting the Treasure Coast Workforce Consortium shall be the Treasure Coast Workforce Development Region, previously a substate service delivery area under the Workforce Innovation Act, as provided for in Section 107 of Title I of the WIOA for the geographical area covered by this Agreement.

11. No Local Funds Required of Counties

No funds will be mandated from the treasuries of any of the parties to this Agreement for implementation of the WIOA, it being the intent hereof that all funding of the WIOA shall be accomplished entirely by grants pursuant to the WIOA and any other available State or Federal grants.

12. Duration of Agreement

This Agreement shall have the duration equal to the period that the Treasure Coast Workforce Development region designation remains in effect for the geographical area covered by this Agreement. Any party to this Agreement may withdraw from this Agreement by passing a resolution to such effect and providing thirty (30) days notice to the other parties to this Agreement. However, the validity, force, and effect of this Agreement shall not be affected by the withdrawal of one (1) or more parties to this Agreement.

13. Effective Date

This Agreement shall be effective when executed by the parties hereto and when a copy of this Agreement has been filed with the Clerks of the Circuit Courts of the respective counties.

IN WITNESS WHEREOF, the undersigned parties have executed this Agreement.

DULY EXECUTED by INDIAN RIVER COUNTY this 19th day of January 2016.

BOARD OF COUNTY COMMISSIONERS - INDIAN RIVER COUNTY, FLORIDA

Leona Allen, D.C.
Jeffrey R. Smith, Clerk of the Circuit Court
And Comptroller

Bob Solari
Bob Solari, Chairman

Approved as to form and legal sufficiency:

William K. DeBraal
William K. DeBraal, Deputy County Attorney



DULY EXECUTED BY MARTIN COUNTY this 9th day of February, 2016.

BOARD OF COUNTY COMMISSIONERS - MARTIN COUNTY, FLORIDA

Carolyn Timmarty
Carolyn Timmarty, Clerk of the Circuit Court
and Comptroller

Anne Scott
Anne Scott, Chair

Approved as to form and legal sufficiency:

Michael D. Dufham
Michael D. Dufham, County Attorney

DULY EXECUTED by ST. LUCIE COUNTY this 26 day of JANUARY, 2016

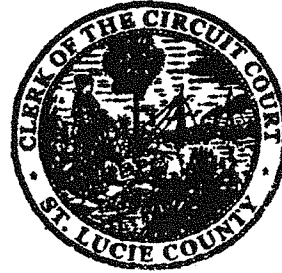
BOARD OF COUNTY COMMISSIONERS - ST. LUCIE COUNTY, FLORIDA

[Signature]
Deputy Clerk of the Circuit Court

[Signature]
Kim Johnson, Chairman

Approved as to form and legal sufficiency:

[Signature]
As soⁿ County Attorney



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BY-LAWS
OF
THE WORKFORCE BOARD OF THE TREASURE COAST, REGION 20

ARTICLE I - OFFICES

The principal offices of the corporation, hereinafter referred to as the Corporation, shall be located in Indian River, Martin or St. Lucie County, Florida, as the Corporation shall from time to time determine.

ARTICLE II - MEMBERSHIP AND DUTIES

The Corporation shall have not less than five members who shall constitute the Board of Directors of the Corporation. The membership will be appointed by the Consortium under the terms of the Interlocal Agreement creating the Board and the Consortium and entered into by Indian River, Martin and St. Lucie Counties. Membership shall be composed of those members required or authorized by state and federal law and as determined to be desirable by the Board of Directors, subject to appointment by the Consortium as provided for hereinabove. The term of membership shall be as set forth in said Interlocal agreement. Vacancies in the Board shall be filled by appointment by the Consortium. Any member who has less than 60% attendance at Board or Committee meetings, based on a program year (7/1-6/30), shall be removed as a member of the Board. Attendance via teleconferencing is limited to three Board meetings, unless approved by the Board in advance. The Board will reflect representation of the local community in terms of industry, race, age, gender, ethnicity, and other characteristics, including persons with disabilities.

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

ARTICLE III - MEETINGS OF THE BOARD

1. Regular Meetings. The Board shall hold regular meetings at least six times annually. One meeting shall serve as the Annual Meeting..
2. Special Meetings. Special meetings may be called by the Chairperson or by a majority of the members of the Board.
3. Place of Meeting. The Chairperson shall designate the place of meeting.
4. Notice of meeting. All meetings will be advertised to the general public. Written notice of the date, time and place of regular and special meetings shall be mailed to all members at least seven days before such meetings, together with an agenda of the business to be conducted.

If the Chairperson or a majority of the membership of the Board determines that an emergency situation requires that a special meeting be called, the seven-day notice requirement may be waived.

5. Quorum. A majority of the membership qualified and sitting shall constitute a quorum for the transaction of business at meetings of the Board, including those members teleconferencing.

6. Voting. All matters before the board (excepting amendments to Bylaws) shall be determined by a majority vote of members present at the meeting with a quorum present. Whenever a conflict of interest exists, or is thought to exist, same shall be declared in an open meeting to the entire Board or committee, by the member having such conflict, and the member shall abstain from voting as is provided herein.

7. Conflict of Interest. A Board member shall not cast a vote on, nor participate in any decision-making capacity on, the provision of services by such member (or any organization which that member directly represents), nor on any matter which would provide any direct financial benefit to that member.

The officers, employees, or agents of the agency making the award will neither solicit nor accept gratuities or anything of monetary value from contractors, potential contractors or parties to sub-agreements.

8. Procedure at Meetings.

a. Robert's Rules of Order shall govern the procedure of Board meetings except when inconsistent with provisions of the Bylaws.

b. All business shall be conducted in accordance with an agenda.

c. All business of the Corporation shall be conducted in accordance with the Florida government in Sunshine Law.

d. Board Members may teleconference into meetings three times per year unless authorized (July – June).

ARTICLE IV – OFFICERS

Chairperson. The Chairperson shall be the chief elected officer of the corporation and shall preside at all Board and Executive Committee meetings. The Chairperson shall appoint

committees and committee chairpersons, shall serve as an ex-officio member of all standing committees and shall perform such other duties as set forth in the Bylaws or as determined by the Corporation. The chairperson shall be a private sector representative.

2. Vice Chairperson. The Vice Chairperson shall, in the absence of the Chairperson, or in the event of his or her inability, perform the duties of the Chairperson and shall perform such other duties as are assigned by the Chairperson. The Vice Chairperson shall be a private sector representative.

3. Treasurer. The Treasurer shall be responsible for the review of all funds received and disclosed by the Board. Such funds shall be kept on deposit in financial institutions or invested in a manner approved by the Board. Checks are to be signed by the President/CEO and at least one other officer. The Treasurer shall cause a quarterly financial report to be made to the Executive Committee. The Treasurer may be a private or public sector representative.

4. President/CEO. The President/CEO shall be the chief administrative and executive officer. The President/CEO shall serve as secretary to the Board and cause to be prepared notices, agendas, minutes of the meetings of the Board and committees and shall maintain the corporate books and records as required by law.

The President/CEO shall be a non-voting member of the Board, executive committee and all committees.

The President/CEO shall serve as advisor to the chairperson and all committee chairpersons and shall assemble information and data and cause to be prepared special reports as directed by the Board.

The President/CEO shall be responsible for hiring, discharging, directing, supervising and setting compensation for all employees.

With the cooperation of the Treasurer, the President/CEO shall be responsible for the preparation of an operating budget covering all activities of the Corporation, subject to approval by the Board. The President/CEO shall further be authorized to make disbursements with approved budget allocations.

The President/CEO shall be chosen by the Executive Committee of the Corporation with the ratification of the Board by majority vote by a properly called meeting. The President/CEO shall report directly to the Executive Committee, who shall maintain supervisory control to the extent necessary and practical.

5. Qualifications. All officers elected after the first annual meeting of the corporation must have been a member of the Board for at least one (1) year prior to being elected to office.

6. Election. The Chairperson, Vice Chairperson and Treasurer shall be elected annually by the membership and shall serve a one-year term commencing July 1. The Chairperson's and the Vice Chairperson's terms shall be limited to two (2) terms, and the Treasurer shall be limited to four (4) terms, The terms of the officers are limited to two (2) terms consecutively in the same office. There are no limitations on the number of terms not in sequence or in different offices.

ARTICLE V - COMMITTEES

1. Executive Committee. The Executive Committee shall be composed of the Chairperson, Vice Chairperson, Treasurer, Immediate Past Chairperson, and such other members of the Board as are appointed by the Chairperson for a one-year term. The Executive Committee shall serve as a committee with administrative oversight responsibilities and is empowered to act and take necessary interim action to implement the plans and programs of the Corporation between

meetings of the Board. All restricted assets of the Corporation shall be managed by the Executive Committee of the Board. An Executive Committee report will be made at each Board meeting at which time the actions of the Executive Committee may be reviewed and ratified by the Board.

The Executive Committee shall assist the Treasurer with financial review responsibilities and shall review the President/CEO's recommended budget and make recommendations, regarding the budget to the Board. The annual audit will be reviewed by the Executive Committee at their first meeting after December 30 when the audit will be available.

If the Chairperson or a majority of the membership of the Board or Executive Committee determines that an emergency situation requires that a special meeting be called, the meeting may be called immediately and the requirement to advertise to the public can be waived.

2. Standing Committees. The Chairperson may establish additional committees, appoint the committee Chairpersons and specify their functions. Such committees shall not have the authority to act for the Board but may review issues or programs and make appropriate recommendations to the Board. Committee membership may include designees or non-Board members provided that the Chairperson and Vice Chairperson are Board members.

3. Ad Hoc Committees. Ad Hoc Committees shall consist of no more than five members of the Board and shall terminate upon completion of the matter of concern for which it was appointed. Membership of Ad Hoc Committees may include designees or non-Board members provided that the Chairperson and Vice Chairperson are Board members.

4. Committee Chairpersons. The committee Chairperson shall be appointed by the Board Chairperson. Each Committee Chairperson shall appoint a Committee Vice Chairperson from the Board members of that committee who will perform the duties of the Chairperson in his or her absence.

5. All committee meetings shall be advertised to the public and held in a location open and accessible to the public.

6. Committees may meet via teleconferencing.

ARTICLE VI - INDEMNIFICATION

The Board shall indemnify, defend, save and hold harmless each member from personal liability, to the maximum extent authorized by law as same may exist from time to time. It is specifically understood that each member is serving in a volunteer capacity and without compensation. It is the intent of this Article that no member shall have personal liability for his or her acts or omissions except in those instances where the Board is prohibited, by law, from indemnifying, defending, saving and holding harmless such member.

ARTICLE VII - AMENDMENTS TO BYLAWS

The Bylaws may be altered, amended or repealed and new Bylaws adopted by the affirmative vote of a two-thirds (2/3) majority of the membership of the Board in attendance at any meeting, provided that any proposal to alter, amend or repeal Bylaws must be submitted to each Board member at least seven days prior to the meeting at which the proposal is to be considered.



ADMINISTRATIVE PLAN

FOR THE WORKFORCE DEVELOPMENT BOARD OF THE TREASURE COAST

D/B/A

“CAREERSOURCE RESEARCH COAST”



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**I. DESCRIPTION OF THE ADMINISTRATIVE ENTITY AND SUB-STATE GRANTEE****G. Service Delivery Area/Sub-state Grantee:**

The Local Workforce Development Area (LWDA20) service delivery area consists of Indian River, Martin and St. Lucie Counties on the eastern seaboard of Florida. The LWDA is located approximately 100 miles north of Miami and 250 miles south of Jacksonville, Florida.

H. Designated Administrative Entity and Grant Recipient:

The Workforce Development Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast (CSRC), a private non-profit 501 (c) (3) corporation, is the grant recipient and administrative entity in LWDA20. CSRC is responsible for oversight and management of the local workforce development system including Wagner Peyser programs, Supplemental Nutrition Assistance Program (SNAP), Re-Employment Assistance, Trade Adjustment Assistance (TAA) program, Workforce Innovation and Opportunity Act (WIOA) programs for adults, dislocated workers, youth and the Welfare Transition (WT) program for recipients of Temporary Assistance for Needy Families. CSRC utilizes federal workforce development funds to provide services to businesses and career seekers through a local Career Center system managed and operated by CSRC. Beginning on January 1, 2009, CSRC began providing direct services for all programs exclusive of the WIOA youth program.

I. Designated Sub-State Grantee:

In LWDA20, CSRC is the designated sub-state grantee. CSRC is responsible for the management and disbursement of WIOA and all other private, state and federal funds allocated to LWDA20.

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II. FINANCIAL MANAGEMENT SYSTEMS

CSRC assures that the financial system provides fiscal control and accounting procedures that are in accordance with Generally Accepted Accounting Principles (GAAP) as applied to governmental units. CSRC complies with OMB 2 CFR 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards and follows the fiscal management requirements codified by the United States Department of Labor at 29CFR 95.21(b). CSRC requires all fiscal procedures documented formally.

A. Financial Reporting:

To ensure observance of limitations and restrictions on specific resources, CSRC uses a computerized fund accounting system to track information on all sub grant and contract awards, obligations, unobligated balances, assets and liabilities. The financial statements are prepared using the accrual basis of accounting. Revenues are recorded when earned and expenses are recorded when a liability is incurred, regardless of the timing of the related cash flows.

The Chief Financial Officer (CFO) or designee prepares monthly state reports from information generated from the CSRC accounting system. Reports are submitted, via the Internet, through the State of Florida's automated financial reporting system, OSMIS. On a quarterly basis, the CFO or designee prepares a worksheet reconciling the financial statements with the information reported on the state reports.

B. Accounting Records:

CSRC uses Abila/MIP Nonprofit Series fund accounting software. As a multiple grant recipient, CSRC records revenue, expenditures, assets and liabilities in separate funds for each grant program. Revenues and expenditures use an eight-segment account coding system. Assets and liabilities only require the use of the first and third segments. The first segment identifies the Fund within which the transaction occurs. The second segment identifies the program year/contract period. The third segment identifies the general ledger account number. The fourth segment identifies the participant eligibility category. The fifth segment identifies the cost category. The sixth segment identifies contracts/sub grants. In addition, this segment provides detailed information on specific programs within a Fund. The seventh segment is for financial statement purposes and identifies transactions as unrestricted, temporarily restricted or permanently restricted. The eighth segment identifies the participant number.

Accounting records are supported by back up of computer records, as well as source documentation. These records are entered into the system as they occur. The accounting database is backed up daily and stored on CSRC's Storage Area Network (SAN) with a copy of the daily backup copied to a cloud-based storage solution for disaster recovery purposes, when needed.

C. Internal Controls and Procedures:

CSRC maintains effective control and accountability over all grant and sub grant assets. It provides adequate safeguards for all such property and assures that property is used solely for authorized purposes. Financial procedures and controls are monitored by the CSRC Executive Committee prior to being presented to the CSRC Board of Directors.

1. *Cash Receipts and Disbursements:*

When CSRC receives funds, the Facilities Manager or designee logs in all cash receipts (checks and/or cash) and date stamps funds received. The Finance Department designee picks up and signs for each cash receipt. Each check is immediately placed in a secure location to be stamped with a restrictive endorsement (For Deposit Only). The Finance Department designee copies the cash receipts (checks and/or cash) and prepares a deposit slip in duplicate. The Finance Department designee keeps copies of the cash receipts and duplicate deposit slips on file.

When the deposit has been made, the validated bank deposit receipt is given to the Finance Department designee and he/she attaches this to all other documentation in a file under his/her supervision pending receipt of the bank statement. The cash receipts log is reconciled to the bank statements monthly and verification of deposits is documented by the CFO. All deposits are made in a timely manner.



All disbursements are made in response to a voucher. Supporting documentation is required to be attached to each voucher. The CFO or designee certifies all vouchers and purchase orders for accuracy. The President/CEO or the Senior Vice President of Operations/COO approves all expenditures to ensure that they are allowable and appropriately recorded. Vouchers prepared for entities that could possibly use funds for lobbying require a notation on the check stub that states that funds are not to be used for lobbying purposes. The President/CEO or the Senior Vice President of Operations/COO approves all checks to vendors by signing the check stub attached to the voucher and the check register. Quarterly, the Board Treasurer reviews the system generated check registers and the check log worksheet to verify accountability of all checks.

Other controls in place include:

- All checks require two laser signatures.
- No checks payable to cash are written.
- Unused checks are kept under lock and key.
- Undelivered checks are kept under lock and key.
- System voided checks are properly documented through the system check spoilage feature. Original copies are attached to the check register for verification by reviewer. A corrected invoice is required for reissue. If appropriate, the CFO or designee will process a “stop payment.”
- After each check run, the beginning and ending check numbers used are entered into the check log worksheet.

A contract, documenting payment terms and conditions, is generated for all service providers and sub-recipients. To receive payment for services rendered, the service provider submits an invoice with the appropriate documentation to the Finance Department. For cost reimbursement contracts with performance deliverables, the Program Performance & Compliance Analyst (PP&C) reviews the performance documentation for data validation and accuracy. Once confirmed, the PP&C Analyst forwards the package to the Senior Vice President of Operations/COO for final review and approval. Once approved, the invoice package is forwarded to the Finance Department. The Finance Department designee reviews the invoice, cost allocation and expenditures portion of the invoice to determine accuracy and appropriate expenditures. The invoice is submitted for payment. Accounts payable procedures are followed to process payment.

2. *Bank Reconciliations:*

Bank statements are obtained online monthly by the CFO. The CFO prepares the bank reconciliations using Abila/MIP Nonprofit Series fund accounting software.

Bank reconciliation includes but is not limited to:

- Accounting for the deposit of all checks received;
- Accounting for all check numbers used;
- Comparing bank statement with register verifying check number and amount;
- Review of online banking activity;
- Review of bank transfers;
- Review checks that are outstanding more than 90 days; and
- Determining if checks to be re-issued or voided.

D. Payroll Procedures:

CSRC uses Microix, an automated timesheet program that interfaces with Abila/MIP to track employee time and activities. Employees are required to record time on a daily basis by fund (grant) and activity codes. Bi-weekly, employees electronically submit their timesheet to their immediate manager/supervisor who reviews and validates the timesheet. Once validated, the manager/supervisor electronically approves thus authorizing the electronic transmittal of the timesheet to the Finance Department. A Finance Department designee reviews all timesheets for accuracy and completeness (regular hours, leave codes, fund/activity codes) and prepares a report summarizing regular and the various types of leave hours by employee.



The timesheets and this summary sheet are then routed to the President/CEO who reviews and signs the summary and timesheets as authorization for payment. In the event the President/CEO is not available, the Senior Vice President of Operations/COO will review and sign the summary sheet and timesheets in order to process payroll for that period.

Once the payroll has been approved for processing, a Finance Department designee will transfer the timesheet information from Microix to Abila/MIP. The HR module of Abila/MIP is used to automatically update the attendance and leave accrual records generated by the Microix time reporting module. The Finance Department designee who is processing payroll will verify that the total hours reported on the payroll reports agree with the payroll summary sheet and that the expenses and deductions appear properly. The CFO or designee then reviews and certifies the reports prior to generating checks or direct deposit vouchers.

Payment will be provided to the employee through electronic transfer to a designated financial institution. Manual checks may be written on a temporary basis only with the written request of the CFO and approval by the President/CEO.

The President/CEO or the Senior Vice President of Operations/COO will review all processed payroll documentation for accuracy and any adjustments necessary will be made in the next pay period. The CFO will then process all 401K employee contributions/employer matches for the pay period via an online secure web portal access to the financial institution.

Either a personnel action form (PAF) or other authorized document initiates a change to the payroll system. In the case of a salary increase, reduction or change in status, a PAF is prepared and signed by a Human Resources Department designee and authorized by the President/CEO or the Senior Vice President of Operations/COO (for staff changes) or by a member of the CSRC Executive Committee (for President/CEO changes only). Copies of these forms are kept in the employee's personnel file. Changes are entered using the HR module of Abila/MIP.

One file is maintained on each employee. A personnel file containing the employment application, assessment information, drug tests, original personnel action forms, disciplinary actions, goals, performance evaluations, recognitions, fringe benefit information, W-4's and I-9's is maintained by the Human Resources Department. The Human Resources Department office is under strict security access by means of hours of operation and allowable swipe card permission levels.

Employees may access and review their personnel files following procedures outlined in the Employee Handbook.

E. Leave Procedures:

Employees follow procedures outlined in the Employee Handbook when requesting leave. Leave time is recorded electronically using the Microix module and employees submit requests to their immediate manager/supervisor. Managers/supervisors review these requests and electronically approves or denies.

F. Travel Procedures:

Employees and Board of Directors are reimbursed for board-related travel that is deemed necessary and reasonable. In May 2010, the Florida Legislature passed proviso language requiring all local workforce development boards to comply with travel policies in accordance with Section 112.061, Florida Statutes. CSRC adheres to the Travel Manual (Attachment I).

G. Budget Control Actual Expenditures vs. Budget:

CSRC's fiscal year operational budget is produced annually by the CFO and submitted to the President/CEO. The budget is reviewed and approved by the CSRC Executive committee, ratified by the CSRC Board of Directors and then taken to the Treasure Coast Workforce Consortium for final approval. Once approved, the budget is submitted to the Department of Economic Opportunity (DEO).

Upon approval or modification of the budget, the CFO is responsible for maintaining, monitoring and reporting the budget information. CSRC's computerized fund accounting system produces monthly financial reports documenting expenditures and balances for each budget line item. These reports are prepared by the CFO and reviewed by the President/CEO and the Senior Vice President of Operations/COO. These reports are presented monthly to the CSRC Executive Committee and approved by the CSRC Board of Directors.



1. Budget Transfer Authority:

The President/CEO has budget transfer authority between line items established within the approved operating budget. This limited authority would be applicable when transferring amounts of \$10,000 or less. In instances where the transfer amount exceeds the threshold, the following processes are followed:

- \$10,001 to \$15,000 may be transferred with the written approval of both the CSRC Chair and Vice Chair.
- Transfer requests that exceed \$15,000 require formal approval of the CSRC Executive Committee before initiating action.

All transfers are documented along with the associated justification and made available for review upon request.

Line item changes within categories can be made by the President/CEO with notice given to the CSRC Executive Committee at the next regularly scheduled meeting.

H. Allowable Costs/Cost Principles/Prior Approval:

CSRC complies with the cost principles defined in OMB 2 CFR 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards. As a part of the accounts payable function, the Finance Department adheres to the following basic standards before charging any cost to a grant, either as an indirect or direct cost:

- Be necessary and reasonable for proper and efficient performance and administration;
- Be allocable;
- Be authorized or not prohibited by state or local laws or regulations;
- Conform to any limitations or exclusions set forth in the Circulars, Federal laws, terms of the Federal awards or other governing regulations;
- Be consistent with policies, regulations and procedures;
- Be accorded consistent treatment;
- Be in accordance with generally accepted accounting principles (GAAP);
- Not be included as a cost or used to meet cost sharing or matching requirements of any other Federal award;
- Be net of all applicable credits;
- Be adequately documented.

The OMB guidance is followed when determining the cost items and administrative requirements that require prior approval. Annually, the CFO will submit the Cost Allocation Plan to DEO. For the items that require prior approval, the CFO will follow DEO guidance and complete the appropriate forms prior to incurring any of these costs.

I. Program Income:

Program income consists of interest earned on federal funds received and receipts from goods or services provided as a result of activities funded by federal grants, as well as funds provided to a service provider that are in excess of the costs associated with the services provided. Program income may be retained only if such income is used to carry out the program. CSRC maintains records sufficient to determine the amount of such income received and the purposes for which such income is expended. Program income may not be used to pay disallowed costs.

Should any program income result from the performance of federally funded contracts by not-for-profit service providers, it is the policy of CSRC that these funds be used for the program that generated the income, or for similarly funded programs (CFDA cluster) or returned to CSRC at CSRC's discretion.

Program/grant funds are separately maintained in the accounting records even though they are deposited into a pooled cash account. Balances per fund are calculated on a weekly basis. Interest earned each month on this pooled account is allocated annually to each fund based on its average monthly balance. CSRC uses the deduction method of reporting program income for those grants that allow the use of program income. For those funds (TANF, RA/UC, etc.) that require the return of interest earnings, an amount in excess of \$500 for the year is returned to DEO.



J. Source Documentation:

All financial activity is maintained by a data processing system and supported by source documentation. A separate file is kept for service providers and vendors.

These files contain copies of invoices, checks, contracts and any other source documents that are required to permit preparation of reports and the tracking of funds. Only the Finance Department has access to computerized records through password security. Computerized financial records are backed-up as is outlined in Section II, B – Accounting Records. All financial records are retained according to the following record retention schedule. The only exception is if any litigation, claim, or audit is started before the expiration of the retention period. The records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken.

| RECORDS | RETENTION PERIOD |
|--|---|
| Audits: Independent | 10 fiscal years |
| Audits: Supporting Documentation | 3 fiscal years |
| Budget Records: Approved Annual Budget | Permanent/Board Minutes |
| Budget Records: Supporting Documents | 3 fiscal years |
| Certified Forward Documents | 3 fiscal years |
| Chart of Accounts | Permanent |
| Correspondence: General | 3 fiscal years |
| Cost Allocation Plans | 5 years from last date effective |
| Financial Statements: Internal Reports | 3 fiscal years |
| Financial Records and Supporting Documents | 5 fiscal years from final audit |
| Fixed Asset Listing | 3 years after final disposition |
| General Ledger: Annual Summary | Permanent |
| General Ledger: Year-end Closing Records | 10 fiscal years |
| Grant Files | 5 fiscal years after completion |
| Insurance Policies and Claims | 5 years after final disposition or expiration |
| Leases | 5 years after completion or termination |
| Leases: Real Property | 15 years after completion or termination |
| Monitoring: Internal | 5 fiscal years |
| Monitoring: State/Federal | 10 fiscal years |
| Payroll Records/Registers | 5 years from final audit |
| Payroll Tax Returns/Forms | 5 years from final audit |
| Personnel Records/Files | 25 years after separation or termination |
| Property Inventory Records | 3 fiscal years |
| Tax Filings and Related Correspondence | 10 years from resolution |

CSRC and CSRC's service providers, when applicable, maintain all participant files in a secure filing system that protects them. Files must contain all supporting documents related to eligibility, counseling, payroll data, employer reimbursements, evaluations and any other data pertaining to the participant's progress in the program and financial information related to that progress. Information must be sufficient for the preparation of reports required by federal grants administered by CSRC to permit the tracking of funds to a level of expenditures adequate to ensure that the funds have not been spent unlawfully.

CSRC and CSRC's service providers, when applicable, retain participant records. Eligibility information collected as part of the application process must be retained for at least one year following the date of application for those applicants determined ineligible for the program. Records of applicants who become participants are retained for five years from the date the participant exits the program.

CSRC's policies on documentation, record maintenance and record retention by service providers are included in all service provider contracts when a service provider contract is in effect. Adherence to these policies is monitored on a regularly scheduled basis by CSRC employees when a service provider contract is in effect.



K. Cash Management/Cash Advances:

CSRC's primary cash receipts are warrants directly deposited into the Cash – Business Checking Account by the State of Florida through electronic funds transfer as cash advances from the various funding sources CSRC receives. Cash advance requests from the State of Florida are done as needed using the State of Florida's OSMIS system. Procedures are in place to receive, disburse and manage cash advances. Cash balances on hand are minimized and the forecasting of cash requirements closely coincides with the actual disbursements of funds. A Finance Department designee prepares a cash request worksheet each week prior to the deadline for cash draws. The cash balance of each fund is verified and reconciled to the general ledger. Invoices that are projected to be paid within the next week are recorded by vendor and fund/grant on this spreadsheet. The projected cash disbursements per fund are then deducted from the current cash balances per fund. Cash advances from the previous week that have not yet been received are added to the appropriate cash balances. Monthly Cost Pool allocations are estimated each week in order to reflect weekly disbursements. Based on the cash needs of each fund, the CFO or designee determines the amount of cash to be requested for that week. The request is entered into the OSMIS system and a copy of that request is attached to the worksheet which is reviewed and approved by both the President/CEO or the Senior Vice President of Operations/ COO. The cash request spreadsheet is reviewed by a Finance Department designee the following week, who verifies that the cash has been received or records a receivable on the spreadsheet for funds requested but not received.

L. Fidelity Bonding:

All employees of CSRC are bonded for faithful and honest performance. Employees whose responsibilities include handling of warrants and/or who have access to cash are bonded for amounts sufficient to cover potential losses. Background checks are completed on each new potential employee. Potential employees with violations posing a high risk to the performance of their duties are not considered.

CSRC advances funds to service providers and vendors, as appropriate and necessary. All service providers acting on behalf of CSRC by receiving or depositing cash advances into program accounts or in issuing financial documents, checks or other instruments of payment for program costs are bonded to provide protection against loss.

Records pertaining to fidelity bonds are maintained by the Finance Department.

M. Audits and Audit Resolution:

As a private, non-profit organization, CSRC complies with the WIOA, OMB 2 CFR 200, the most current state policy and all other federal and state regulations pertaining to the auditing of federal funds, the procurement of those audits and the resolution of audit findings.

Within 30 days after receiving a completed audit, CSRC transmits three copies of the audit report along with any corrective action plans necessary to DEO. Within 60 days of receiving a completed report, CSRC submits an audit resolution report detailing all corrective actions taken.

CSRC utilizes a formal competitive Request for Qualifications (RFQ) for obtaining auditors. CSRC must complete this RFQ process every five (5) years. The RFQ is sent to a minimum of three independent auditing firms. The RFQ cites the specific audit requirements, evaluation criteria, proposal provisions and any other necessary information. A copy of the proposers' most recent peer review, the qualifications for the auditors, disclosure of disciplinary action taken by the State Board of Accountancy within the last three years and references are also requested. The CSRC rating team reviews and ranks responses in order of qualifications and recommends a contractor from among the proposers. The CSRC rating team's recommendation is reviewed and approved by the Executive Committee's and approved by the CSRC Board of Directors.

Non-federal, non-profit service providers expending \$750,000 or more annually in federal awards are required to have an organization-wide Single Audit conducted in accordance with OMB 2 CFR 200.

Non-federal, commercial (for profit) service providers expending \$750,000 or more in a fiscal year in federal awards shall have either an organization-wide audit that includes coverage of federal contracts within its scope or a program specific annual independent financial and compliance audit conducted and prepared in accordance with Generally Accepted Government Auditing Standards (GAGAS).



Non-federal service providers expending less than \$750,000 in a fiscal year in federal awards are exempt from federal audit requirements for that year. Records must be available for review or audit by appropriate officials of the federal agency, pass-through entity, and Government Accountability Office (GAO).

Audit costs can only be charged to federal grants if related to the performance of a Single Audit or if the non-federal entity does not currently have any federal funding and the audit cost is in the indirect cost pool for a cost allocation plan or indirect cost proposal.

A copy of the audit is to be furnished to the CSRC Board of Directors within nine (9) months and/or 30 days of receipt, whichever is sooner from the end of their year-end or 30 days of receipt, whichever is earlier. Results of the audits are forwarded to the appropriate state authority in a timely manner.

In the event a service provider should go out of business, CSRC must be notified immediately. CSRC then becomes the designated custodian of all federal program related records and must be notified of the designated custodian of the service provider's other records.

When CSRC is notified that a service provider is going out of business and the service provider has expended \$750,000 or more of federal funds, CSRC will notify its audit firm to do an immediate audit of the service provider in accordance with 2 CFR 200 or GAGAS. If the service provider has received less than the designated monetary thresholds, CSRC will do an immediate audit of the service provider. This policy is added to all service provider contracts initiated by CSRC.

CSRC accepts responsibility for resolving audit findings locally and has established procedures for the CSRC Board of Directors review and resolution of service providers audit reports. These procedures include a review of audit reports to ensure the requirements of OMB guidance and state policies are met. All findings and recommendation reports are reviewed by the President/CEO. The proper actions in response to the findings and recommendations are determined and all actions needed to correct or otherwise resolve findings are completed within established timeframes as outlined in the procedures noted in this section and under "Debt Collection."

CSRC's auditing and resolution procedures include issuance of a written determination that states:

- whether or not there are findings to be resolved;
- whether or not questioned costs are allowed;
- whether or not corrective actions for administrative findings are adequate; and
- that all findings are subject to state and federal review.

These procedures also establish a debt, if applicable, and provide repayment options and appeal rights for the service provider. (See Section N: Debt Collection)

When there are no findings to be resolved, it is so indicated in the audit report and a copy of which is forwarded to the service provider under a cover letter. The audit file is then considered closed.

N. Debt Collection:

If an audit determination or other indication finds that a mis-expenditure of funds exists, prompt and appropriate corrective action will be taken. Notice and an opportunity for a fair hearing will be granted. Upon determination that the mis-expenditure of funds was due to willful disregard of the state or federal rules and regulations, gross negligence, or failure to observe accepted standards of administration, the service provider, as appropriate, shall be liable to repay such amounts from funds other than those received under all federal awards. These procedures also apply when a mis-expenditure of funds is discovered through means other than an audit (such as a monitoring review, Inspector General review, etc.).

CSRC will attempt to collect debts from service providers through informal requests (phone, letters, and personal contact). If this is not productive, formal debt collection through the courts will be pursued if appropriate.

Repayment of debt must be made in cash (money order or cashier's check), unless prior approval of another method of repayment has been requested by CSRC and an official response obtained from DEO.



The CSRC Executive Committee serves as the hearing board for all complaints or grievances arising from audit findings, disallowed costs and investigations or monitoring reports.

All affected parties may request, in writing, a hearing before the CSRC Executive Committee. On more serious offenses, the CSRC Executive Committee may request an appearance by the appropriate parties. Hearings on any grievance are conducted within 30 days of the filing of the grievance and a decision within 60 days of the filing date. All decisions are final.

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III. PROCUREMENT POLICIES AND PROCEDURES:

A. Purpose:

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

The President/CEO is authorized by the CSRC Board of Directors to enter into contracts and agreements financially obligating CSRC provided the obligation is consistent with the current CSRC Board of Directors approved budget, CSRC's plans, or other documents governing CSRC's strategic direction, and the total contract is less than \$100,000. The President/CEO may designate the Senior President/COO or Vice President(s) as the approving authority/designee. Contracts for \$100,000 or more require approval by a majority vote of the CSRC Board of Directors.

The President/CEO, or the President/CEO's designee, has approval authority over all purchases and contractual commitments and makes the final determination on any proposed purchases where budgetary or other conditions may result in denial.

Authorized staff members (purchasing agents) have the authority to initiate purchases on behalf of their departments within the guidelines described below. The President/CEO or authorized designee is responsible for notifying the Finance Department of all individuals authorized to initiate purchases or prepare purchase orders. The Finance Department maintains a list of all authorized purchasing agents.

B. Recordkeeping:

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

C. Designated Contract Officials:

The CSRC Board of Directors approves all service provider contracts. The CSRC Board of Directors authorizes the President/CEO to sign service provider contracts, contract modifications and terminate contracts on behalf of the CSRC Board of Directors after the Board of Directors has approved issuance of the contract or the need for termination. The President/CEO may authorize a designee. The decision to execute or terminate a service provider contract originates with the CSRC Board of Directors.

Other contracts, \$100,000 or less, for goods and services, may be initiated by employees (purchasing agents) and are approved by the President/CEO or authorized designee, provided the cost for the items or services is included in the CSRC Board of Directors approved budget.

D. Code of Conduct:

CSRC has established ethical standards for employees engaged in the award and administration of service provider contracts. These standards involve personal standards of conduct and fair and equitable treatment of service providers and potential service providers. Employees are expected to carry out their responsibilities related to procurement with complete impartiality and without preferential treatment of anyone. CSRC's standards include the following:

1. *Confidentiality*

All CSRC Employees/Board of Directors are to observe rules of confidentiality during the procurement process, the negotiation and award phase and the post-award of the service provider contract. These rules include not disclosing (1) the number and names of proposers until the contract is awarded or the discussion is made public, (2) technical or cost/price information that is submitted by proposers or gathered as evaluation criteria, and (3) fund availability until that information is known to all proposers.



2. *Disclosure*

Information must be given to all proposers and potential proposers equally. The requirements and release of solicitations are made public through legal advertising and is not prematurely divulged to favorable sources. The rating criteria used to evaluate proposals is provided in advance to all potential proposers. Information provided to one proposer is shared with all other known potential proposers when the information is not contained in the request for proposals.

3. *Fairness and Impartiality*

To ensure fairness and impartiality to all proposers, specifications in the request for proposal are stated in generic terms avoiding unduly restrictive requirements. Requests for Proposals (RFP) are reviewed for terms and conditions that appear to be restrictive prior to the RFP being issued. All CSRC Employees/Board of Directors engaged in the review of proposals and/or the award of a contract are expected to abide by CSRC's Code of Ethics, specifically the Conflict of Interest standards, and to withdraw from the process if they cannot review the proposal, negotiate the contract or award the contract without total impartiality and fairness.

During the purchase of goods and general services, CSRC uses the following ethical conduct standards:

- Employees discourage the offer of and decline individual gifts or gratuities of value in any way that might influence the purchase of supplies, equipment, and/or services.
- Employees notify his/her immediate supervisor if he/she is offered a gift.
- No CSRC Board Member, Officer or Director, Employee or Agent for CSRC participates in the selection or administration of a vendor if a real, or apparent, conflict of interest is involved. (See Section E -Conflict of Interest)
- CSRC Board Member, Officer or Director, Employee and Agents for CSRC, neither solicit nor accept gratuities.

E. Conflict of Interest:

CSRC has a conflict of interest policy that governs the participation of CSRC Employees/Board of Directors, either directly or indirectly, in the procurement process. This policy requires CSRC Employees/Board of Directors to withdraw from the procurement process if there is any apparent or perceived conflict of interest connected with their involvement in the procurement process. CSRC's conflict of interest policy states that:

- A CSRC Board of Director shall not cast a vote on, nor participate in, any decision-making capacity on the provision of services by such member (or any organization which that member directly represents), nor on any matter which would provide any direct financial benefit to him/her.
- Neither membership on the CSRC Board of Directors nor the receipt of WIOA funds to provide training and related services shall be construed, by themselves, to violate the state and federal rules and regulations.
- The officers, employees, or agents of the agency making the award will neither solicit nor accept gratuities or anything of monetary value from contractors, potential contractors, or parties to sub-agreements.
- CSRC Employees/Board of Directors involved in the rating of proposals are required to sign a certification indicating they have no conflict of interest or privileged information regarding the proposer and that they will not be enriched by the contract.



F. CSRC Contracting Rules:

In accordance with CareerSource Florida Inc., *State and Local Workforce Development Board Contracting Conflict of Interest Policy (May 2012)*, CSRC will not enter into a contract with one of its own CSRC Board of Directors, with an organization represented by its own membership or with any entity where a CSRC Board member has any relationship with the contracting vendor/sub-recipient.

At CSRC's discretion, the following may be exempted from the above paragraph:

- Contracts with an agency (as defined in Florida Statute 112.312[2], Florida Statutes);
- Contract relating to a CSRC Board member's appointment to the CSRC Board of Directors under section 101(a) (2), Public Law No. 113-128, ("WIOA");
- A contract with a CSRC Board member receiving a grant for workforce services under federal, state or other governmental workforce programs;
- A contract between CSRC Board of Directors and a CSRC Board member, which is not exempted under bullets above where the board documents exceptional circumstances and/or need, and the CSRC Board member does not personally benefit financially from the contract. Based upon criteria developed by CareerSource Florida Inc., DEO shall review CSRC's documentation and assure compliance.

Each contract which is exempted from the general prohibition in the paragraph above must meet the requirements set forth in the section below (Rules Regarding Contracting with CSRC Board of Directors), including, but not limited to, the requirements of the WIOA "conflict of interest" provisions.

G. Rules Regarding Contracting with a CSRC Board member:

1. *Definitions:*

- *"has any relationship with the contracting vendor"* means the director is an owner or a principal of the vendor, or a principal of the vendor has retained the director, or the parent organization or subsidiary of a corporate principal of the vendor has retained the director or a director's known relative or director's business associate is an owner of the vendor. For purposes of this policy, vendor, contractor and sub-recipient are the same.
- *"benefit financially from a contract"* means the special private financial gain to a director, a special private financial gain to any principal which retains the director, the special private financial gain of the parent organization or subsidiary of a corporate principal which retains the director or the special private financial gain to any director's relative or business associate or to a CSRC employee or a CSRC employee's relative and such benefit is not remote or speculative. "Personally benefit financially" means a special private financial gain to a director only.

Additional definitions are in Part I (Definitions) of CareerSource Florida Inc., *State and Local Workforce Development Board Contracting Conflict of Interest Policy (May 2012)*.

CSRC must comply with all requirements of section 445.007, Florida Statutes, prior to contracting with a CSRC Board member or other person or entity that could benefit financially from a contract (as defined above). These requirements are:

- All contracts between CSRC and a CSRC Board member or other person or entity who may benefit financially from a contract (as defined above) must be approved by a two-thirds vote of the CSRC Board of Directors present, once a quorum has been established, and the approval of such contracts shall not be delegated to staff or committees. The CSRC Board member who abstains from voting due to conflict of interest will not be counted towards the quorum.



- The fact that a CSRC Board member or other person or entity could benefit financially from the contract (as defined in the policy) must be disclosed in the meeting, and made part of the minutes of the meeting before the vote is taken. The CSRC Board member's absence from the meeting does not relieve CSRC from the disclosure and two-thirds vote requirements. All other known conflicts must be disclosed before the vote. If a CSRC Board member or CSRC employee discovers a conflict of interest after the vote, then the conflict must be disclosed in a procedure consistent with section 112.3143(4)(b), Florida Statutes. CSRC Board of Directors who could benefit financially from the contract or who have any relationship with the contracting vendor (as defined in the policy) must abstain from voting on the contract. A CSRC Board of Director's designee cannot vote in the place of a CSRC Board of Director who is required to abstain.
- CSRC contracts (i.e., contracts with CSRC Board of Directors) equal to or greater than \$25,000 shall not be executed prior to the written approval of CareerSource Florida Inc.
- CareerSource Florida Inc. must submit all contracts equal to or greater than \$25,000 with CSRC Board of Directors or other persons or entities that could benefit financially from the contract to DEO along with documentation, as specified by the policy, demonstrating compliance with section 445.007, Florida Statutes.
- A contract under \$25,000 between CSRC and a Board member of CSRC or between a relative of a CSRC Board member or of an employee of CSRC is not required to have the prior approval of CareerSource Florida Inc. but must be approved by a two-thirds vote of the CSRC Board of Directors present, once a quorum has been established and after full disclosure with the Board member's abstention and must be reported to DEO and CareerSource Florida Inc., within 30 days after approval.
- Contracts with a CSRC Board member or other persons or entities that could benefit financially from the contract (as defined the policy) in which CSRC is receiving monies or other compensation (such as a CSRC Board member paying rent to CSRC or paying for CSRC services) are exempt from this policy.
- The term "contract" includes the initial contract and all amendments, renewals, or extensions. Renewals or extensions of contracts with CSRC Board members or persons or entities that could benefit financially from the contract must be approved under the same procedure as if the renewal or extension were an original contract. Any amendments to a contract which could benefit financially a CSRC Board member or another person or entity (as defined in the policy) must be approved under the same procedure as if the amendment were an original contract. Any amendments which do not benefit financially a CSRC Board member or other person or entity (as defined the policy) may be approved by a regular majority vote where there is a quorum according to CSRC rules and/or bylaws.
- All other requirements of section 445.007(1) must be met. For example, a CSRC Board member must continue to disclose any conflict of interest in a manner that is consistent with the procedures outlined in section 112.3143, Florida Statutes.
- In order to comply with the requirements of section 445.007, CSRC shall advise and require CSRC Board of Directors to disclose known conflicts of interest and notify CSRC of any contracts which may benefit them personally. In order to comply with the requirements of section 445.007, CSRC shall advise and require all parties to a contract to disclose all known conflicts of interest and notify CSRC of all CSRC Board of Directors or other persons or entities known to benefit financially from the contract (as defined the policy).
- A contract which is initially subject to the requirements of section 445.007 due to a CSRC Board member's, a CSRC employee's or another person's or an entity's conflicts of interest at the time of approving the contract is not subject to these procedures after the departure of the CSRC Board member from the membership, the departure of the employee from CSRC's employ or other actions have removed the conflicts of interest.
- The above requirements do not eliminate or diminish CSRC's obligations to comply with Public Law 113-128 ("WIOA") "Conflict of Interest" procedures and 20 CFR 683.200.



H. Required Documentation:

For each contract equal to or greater than \$25,000, CSRC must electronically submit after the approval of the contract a completed contract information form certified by the CSRC Board of Director's Chairperson as correct and true to workforcecontract.review@deo.myflorida.com containing the following information:

- Identification of all parties to the contract;
- Description of goods and services to be procured;
- Value of the contract, contract renewal or contract extension;
- Contract term;
- Contract number or identifying information, if any;
- Identification of board member or employee whose conflict of interest required the CSRC Board of Directors approval of the contract by 2/3 vote;
- The nature of the conflict of interest in the contract;
- A certified board membership roster listing all members on the Board at the time of the vote on the approval of the contract with a vote tally indicating attendance or absence at the meeting and for those in attendance, the affirmative and negative votes and abstentions for each Board member;
- Dated and executed conflict of interest forms, which are consistent with the procedures outlined in section 112.3143, Florida Statutes, submitted at or before the CSRC Board of Directors meeting, for CSRC Board members who have any relationship with the contracting vendor (as defined the Contract Guidance); and
- Other information as specified on the contract information form.

I. Small Purchase Thresholds and Non-Competitive Procurements:

Purchasing procedures outlined in this section pertain to the procurement of goods and services costing \$100,000 or less. A cost/price analysis must be performed in connection with every procurement in excess of the Simplified Acquisition Threshold specified in OMB 2 CFR 200. Cost/price analyses will help ensure that:

- Public funds are spent economically and the cost is reasonable;
- The funds expended are appropriate in relation to the need for the service; and
- Vendors provided the best services at the most favorable prices.

Where appropriate, an analysis is made of lease and purchase alternatives to determine which would be the most economical and practical procurement.

The purchasing of materials, supplies, equipment and services costing \$100,000 or less are categorized and processed according to three categories of cost. The purchase of items and services costing \$3,500 or less (Micro-purchases) are initiated by a purchasing agent and reviewed and approved or denied by the President/CEO or Senior Vice President of Operations/COO. Items and services within this cost category may be awarded without soliciting competitive quotations if CSRC considers the price reasonable. To the extent practicable, the micro-purchases will be distributed equitably among qualified suppliers.

A "Purchase Authorization" form is to be completed. The "Purchase Authorization" form provides the justification and benefit of the purchase along with a cost comparison analysis, if applicable. Ordinary and routine purchases for CRSC owned vehicles and reasonable repair and maintenance supplies will not require a "Purchase Authorization" when paid on a company credit card. In addition, credit card purchases under \$500 made by Authorized purchasing agents will not require a Purchase Authorization Justification Form, but will require written approval, including email, from the President/CEO. Only at the request of the vendor, will a Purchase Order be issued. If approved, the purchasing agent processes the order for the item or service, signs the invoice when the service is completed or when the item has been delivered and submits the invoice, along with the original "Purchase Authorization" and supporting documents, to the Finance Department for payment.

Items and services costing \$3,500.01 to \$5,000 are initiated in the same manner as outlined above. Items and services within this cost category require the purchasing agent to obtain three telephone, written or Internet quotes.

For services, supplies or other property costing more than \$5,000.01 but less than \$100,000.00, three written quotes are required and purchases are initiated in the same manner as outlined above.



J. Ordering and Receipt of Purchased Goods and Services:

The Facilities manager signs off on delivery of packages and supplies. The employee who requested the good or service verifies the receipt of the items, as well as signs and dates the packing slip. Any goods and services for multiple locations are signed off as received by those personnel authorized to receive such goods and services. Discrepancies in ordered merchandise (short delivery/returned items) must be recorded on the packing slip and followed up with the vendor. All discrepancies will be documented prior to the invoice being forwarded to the Finance Department for payment. Finance Department designee will compare the (description, unit price, quantity) on the packing slip to the invoice received. Vendor statements will be analyzed monthly to ensure that all credits have been recorded by CSRC and the Vendor.

K. Items Requiring State Approval Prior to Purchase:

When required, the Finance Department will submit a request to the DEO to purchase items requiring prior grantor approval in accordance with 2 CFR 200 on the appropriate form pursuant to DEO Policy Number 87 (Prior Approval Administrative Policy for local workforce development boards). For the remaining items that require prior approval and which are not on the annual form, CSRC will complete and submit to DEO "Prior Approval Request Form / Other Individual Items" prior to incurring expenditures. The request for approval must be followed by an appropriate procurement.

L. Special Purchasing Conditions:

1. *Noncompetitive Proposal/Sole Source:*

Noncompetitive proposal/sole source may be used when the award of the contract under competitive negotiation or small purchase procedures is not feasible.

In general, purchases will be awarded under noncompetitive negotiations only when it is appropriate, necessary and in the best interests of CSRC.

Circumstances under which a contract may be awarded by noncompetitive negotiations are limited to the following: (1) the goods or services to be procured are available only from a single source; (2) organizational exigency or emergency where the urgency for the purchase will not permit the additional time needed for competitive solicitation; or (3) after solicitation of various sources, CSRC determines competition is inadequate.

A failure to properly plan for procurement is not an emergency under these rules.

In the event of an exigency or emergency, a competitive procurement must be initiated within two years after the purchase or procurement. In other instances, where sole-source procurement was used for a purchase, an attempt to solicit the goods or services through competitive procurement must be initiated within three years after the procurement.

Utilizing the "Purchase Authorization Form", it details sole source required information. These purchases require verbal consent from the President/CEO, or in the absence of the President/CEO or the Senior Vice President of Operations/COO. The circumstances surrounding such a purchase must be documented in writing, after the fact, and all parties involved in the decision to purchase must sign the document. The document will be stored by the Finance Department with the paid invoice.

2. *Exempt Purchases:*

Purchases made with unrestricted funds are exempt from the procurement procedures.

3. *Routine Purchases:*

An annual price analysis to document reasonableness may be conducted for goods and services ordered on an ongoing basis. In lieu of a price comparison for each purchase, an annual price analysis will be prepared for goods and services purchased on a regular basis to operate the organization. An annual estimate will be made of the value of the items to be ordered, and the proper procurement in accordance with the above policies will be completed based upon the aggregate amount estimated to be necessary.



Purchases made based upon prices established by a state contract administered by the State of Florida Department of Management Services (DMS), will not require further procurement actions. When making a purchase based upon a price established by a state contract, the contract number, year and title will be noted on the documents maintained for the CSRC procurement file.

Purchases made based upon a procurement made by another unit of local government, or a public entity established by law, such as (among others): Early Learning Coalitions, other LWDB's, DEO or the State of Florida, will not require further procurement actions because these bodies are subject to the same or similar procurement requirements as CSRC. When making a purchase based upon such procurement, a copy of the procurement should be attached to the purchase requisition or the procurement file for that item as appropriate. If the item was a sole-source procurement, CSRC may not rely on the procurement unless it meets the noncompetitive proposal/sole source requirements described above. CSRC may use this method provided the body has followed the same or similar procurement guidelines as CSRC and can provide appropriate backup documentation.

M. Other Procedures

When possible, CSRC may enter into state and local intergovernmental agreements where appropriate for procurement or use of common or shared goods and services and may use Federal excess and surplus property in lieu of purchasing new equipment and property.

All procurement contracts and other transactions between CSRC and units of state and local governments using WIOA funds must be conducted only on a cost reimbursement basis. No provision for profit is allowed. Any excess of revenue over costs incurred for services provided by a governmental or non-profit entity must be included in program income.

CSRC will negotiate as a separate element of the price for each contract in which there is no price competition and in all cases where cost analysis is performed. Costs or prices based on estimated costs for contracts are negotiated using the Federal cost principles.

The cost plus a percentage of cost or percentage of construction costs methods of contracting shall not be used.

For fixed amount sub awards prior approval from DEO will be obtained. Payments will be based on meeting specific requirements of the federal award and accountability is based on performance and results. The award amount will be negotiated using the cost principles as the guide. CSRC will use cost, historical cost, or unit pricing data to establish the fixed amount award with assurance the sub-recipient will realize no increment above actual cost. If the award is terminated before the completion of the project, the award amount will be adjusted. The sub-recipient will certify in writing to CSRC at the end of the award that the project or activity was completed or the level of effort was expended. Prior written approval is required by the sub-recipient for changes in project leader or scope of effort.

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

N. Formal Requests for Proposals (RFPs)

Goods and services costing more than \$100,000 can only be purchased through competitive proposal procedures. These formal procurement processes requiring the development of a RFP, review and/or rating of proposals and the awarding of a contract. Once a contract is awarded, a copy of the contract is routed to the Finance Department along with a purchase order for the item or service being ordered. Once the work is completed or the item received, the invoice for payment is signed by the staff person receiving the item or service and routed to the Finance Department. A Finance Department designee prepares a voucher, attaches all documentation and routes the package to the President/CEO or authorized designee for approval. Once approved, a Finance Department designee issues payment.

The formal procurement process requiring a proposal is initiated by CSRC employees or CSRC Board of Directors who identify a need. Costs are researched (cost estimate) immediately to determine the approximate market cost of the service, supply or property; and leasing, if appropriate, versus procurement is investigated. The cost estimate is documented in writing. If procurement is the best choice and the anticipated cost exceeds \$100,000 a written solicitation for a proposal is prepared. At a minimum, this request includes:



- general information;
- applicable laws and rules;
- proposal instructions;

- clear and accurate descriptions of the goods or services being procured. The description must not contain features that restrict competition;
- All requirements that must be fulfilled and all other factors used in evaluating bids or proposals;
- Technical requirements described in terms of functions to be performed or performance required, including a range of acceptable or minimum acceptable standards;
- Specific features of —brand-name or equal descriptions, if included in the solicitation;
- If procuring goods or certain types of services, the acceptability of metric measurements;
- Preference for ecologically sound and energy-efficient products;
- a disclaimer stating CSRC is not obligated to make an award and all bids may be rejected; and
- Federally required Contract Provisions, Certifications and assurances

Competitive RFPs are developed according to established procedures approved by the CSRC Board of Directors. The President/CEO or authorized designee monitors procedures to ensure they are followed when procuring service providers. To avoid unnecessary duplications, a RFP may not be initiated without the President/CEO's approval. The CSRC Board of Directors approves all RFPs. The final selection of a service provider rests with the CSRC Board of Directors.

The following procedure is the official process for development, issuance and finalization of RFPs for programs and participant services:

- A draft RFP is prepared, incorporating all applicable requirements established by CSRC policy. At a minimum, the RFP includes a clear and accurate description of the technical requirements for the service to be procured, all requirements to be fulfilled by the proposer, and all other factors to be used in evaluating proposals. The relative importance of price is stated in the solicitation.
- Draft RFPs are presented to all appropriate CSRC committee(s) or the CSRC Board of Directors. The committee/CSRC Board of Directors review, discuss and approve the need for procurement and the terms of the RFP.
- If approved by any/all CSRC committee(s), the recommendation is forwarded to the CSRC Board of Directors. In the event the CSRC Board of Directors does not meet within a reasonable timeframe that would allow timely issuance of the RFP, the CSRC Executive Committee is empowered to act for the CSRC Board of Directors.
- Employees finalize the RFP incorporating all changes and recommendations approved by the CSRC Board of Directors.

Public advertisements are placed on the CSRC's website. When it is advantageous to stimulate greater competition among proposers, advertisements may be placed in publications serving a greater geographical region. Announcements of RFP's are communicated to potential service providers contained on the CSRC's service provider list and those organizations, which employees and/or CSRC Board of Directors believe may be potential providers who may not be contained on the inventory of potential service providers.

CSRC will ensure all prequalified lists of persons, firms, or products which are used are current and potential bidders will not be precluded from qualifying during the solicitation period.

Proposals received in response to the RFP are logged in with the date and time of receipt. Proposers are requested to send proposals sealed and they remain sealed until opened by designated staff. If fewer than three responses are received, and there is sufficient time before the good or service is needed, CSRC may attempt to obtain additional responses. After a public solicitation, if only one bid is received, it will be evaluated under the rules governing sole source purchases and a cost analysis performed.

Proposals are opened by at least two staff members who certify the proposal opening with their signatures.

Proposals are then routed to CSRC employees and/or CSRC Directors designated by the President/CEO and/or the CSRC Board of Director's Chairperson to be members of the rating team. Each rater receives copies of the



proposal, the rating sheet and any other evaluative or historical information pertaining to the service provider or the procurement.

Proposals are rated first individually by each rater. At a specified meeting, all raters present and discuss their evaluation of the proposals and all proposals are ranked according to average scores.

The CSRC committee(s), who originally reviewed the RFP hears the rating team's recommendations, selects a potential service provider and sends that recommendation to the CSRC Board of Directors. The recommendation includes documentation of need, specific procedures to meet the need, time limits for the service, competencies/benchmarks established, the reasonableness of cost and the type of contract recommended. The CSRC Board of Directors review all recommendations and evaluations and vote for approval or rejection.

If approved, CSRC employees negotiate the terms of a contract and prepare the contract, either cost reimbursement or fixed price, for signature. Contracts may be signed by the President/CEO or authorized designee.

Once all necessary signatures and documentation are obtained, the contract is considered to be fully executed and the service provider is free to begin the work outlined in the contract.

1. *Selection of Contract Awardees:*

Awards are made based on an organization's demonstrated ability to perform successfully under the terms and conditions of a proposed contract, or, in the case of sealed bids, price, quality and convenience of the goods or service being provided.

When soliciting architectural/engineering, legal or accounting professional services, CSRC evaluates each competitor's qualifications and the most qualified competitor is selected subject to the negotiation of fair and reasonable compensation.

CSRC uses a formal rating system to evaluate the ability of a service provider to adequately deliver the services desired at a reasonable cost when sealed bids are required. This evaluation includes a complete review of staffing, facilities, the organization's past performance, budgets, financial capability and references, as well as other considerations pertinent to successful and competent performance. Evaluations are completed by assigning point values to the qualities of each service provider, totaling individual scores, averaging each rater's totals and ranking all proposals according to that average. The proposer who ranks first is generally recommended as the choice for service provider unless there is some extenuating circumstance that would be detrimental to CSRC's interest.

The primary consideration in selecting service providers is their demonstrated ability to perform successfully under the terms and conditions of the proposed contract. These determinations are completed in writing and take into consideration the following:

- Adequate financial resources to operate the contracted program or the ability to obtain them;
- The ability to meet the specifications or conditions of the program at a reasonable cost, and the ability to meet performance goals;
- A satisfactory record of past performance including demonstrated quality of training; reasonable dropout rates; the ability to provide or arrange for appropriate supportive services including child care; retention in employment; and earning rates of participants;
- A satisfactory record of business ethics and fiscal accountability; and
- The necessary organization, experience, accounting and operational controls, and the technical skills to perform the required work.

In determining demonstrated performance of institutions and organizations that provide training, performance measures such as retention in training, training completion, job placement, and rates of licensure of program completers are taken into consideration.

CSRC will take all necessary affirmative steps to assure that small businesses, minority firms, veteran-owned, women-owned business enterprises, and labor surplus area firms are used when possible. Information is requested through the RFP process regarding the classification and ownership of the proposing organization.



No occupational skills training programs are funded unless the level of skills provided in the program is in accordance with guidelines established by the Board and industry standards. These guidelines are a part of each application for training services.

CSRC will impose the following requirements on sub-recipients:

- Funds shall not be used to pay the salary and bonuses of an individual, either as direct costs or indirect costs, at a rate in excess of Executive Level II for ETA approved funds;
- CSRC requires an approved federally recognized indirect cost rate or a rate negotiated between CSRC and the sub-recipient in compliance with 2 CFR 203.331, or a de Minimis indirect cost rate; and
- The sub-recipient will permit CSRC and its auditors access to the sub-recipient's records and financial statements, as necessary.

For the awarding of On-the-Job Training (OJT) contracts, which are non-competitive procurements, historical records of employer's past performance are checked to determine their ability to perform. Employers who have had two or more previous OJT contracts and exhibited a pattern of failing to provide participants continued long-term employment (minimum of one year) as regular employees with wages and working conditions at the same level and to the same extent as similarly situated employees are ineligible for a contract. The period of ineligibility for additional OJT contracts is six months.

Each employer's success rate will be tracked by CSRC employees. This assessment will include:

- Identification of the OJT employer;
- The number of OJT participants enrolled;
- The number of participants with neutral terminations (death, participant quitting, participant terminated for cause, other);
- An adjusted enrollment (The number of participants enrolled minus the number of neutral terminations);
- The percentage of successful participants (The number of successful participants divided by the adjusted enrollment);
- The percentage of unsuccessful participants (The number of unsuccessful participants divided by the number of adjusted enrollment);
- The percentage of successful participants with wage gains;
- The percentage of successful participants with no wage gains; and
- The percentage of successful participants with wage losses.

2. *Cost/Price Analysis*

A cost/price analysis will be made and documented in the procurement file in connection with every purchase in excess of the Simplified Acquisition Threshold specified in 2 CFR 200. Price analysis may be accomplished in various ways, including the comparison of price quotations submitted, market prices and similar indicia, together with discounts. Cost analysis is the review and evaluation of each element of cost to determine reasonableness, allocability and allowability.

3. *Contract Instruments:*

All contracts should identify:

- a) Type of contract based upon the business needs of the organization (i.e., cost-reimbursable, fixed-price, performance-based, purchase orders);
- b) Contract assurances (boilerplate);
- c) Term;
- d) All tasks the contractor is to perform (Statement of Work);
- e) Contract budget; *
- f) Events that trigger payment (deliverables);
- g) Required level of services (performance standards);
- h) Federally required contract provisions, certifications and assurances; and
- i) ETA Salary Cap requirement under Section 7013 of Public Law 109-234.



*Per 20 CFR Part 667.200, all procurement contracts and other transactions between local boards and units of state or local governments must be conducted only on a cost-reimbursement basis. No provision for profit is allowed.

4. *Contract Modification/Continuation/Renewal*
CSRC contracts will be one of the following:

- For a defined time period with a stated expiration date with no option for renewal;
- For a defined time period with a stated expiration date and a stated option for renewal; or
- Open-ended with no expiration date and renewable annually without the action of either party. Any contract of this type must allow CSRC, at least 60 days before automatic renewal, the absolute right to not renew the contract.

The modification and/or continuation/renewal of a contract will require the completion of a contract agreement modification and approval by the President/CEO or authorized designee. Contracts for goods or contractual services may be renewed for a period that may not exceed five (5) years. Renewal of a contract for goods or services will be in writing and will generally be subject to the same terms and conditions set forth in the initial contract. Renewals will be contingent upon satisfactory performance evaluations by CSRC and subject to the availability of funds.

5. *Procurement Files:*

Files on vendor and/or service provider procurements are maintained by the President/CEO or authorized designee. The procurement files shall include at a minimum the following:

- RFQ/RFP;
- Proof of public notice;
- Correspondence related to notification of prospective bidders and/or bidder list;
- Proposals submitted;
- Mailing lists of potential providers;
- Evaluation documentation;
- Conflict of Interest Statements;
- Debarment list clearance (if applicable);
- Minutes of committee and Board approval (if applicable); and
- Correspondence related to notification of awards

6. *Sub-recipient/Vendor Determination*

CSRC employees will evaluate the substance of each relationship to determine whether the features represent a vendor or sub-recipient relationship in accordance with 2 CFR 200. The Sub-recipient and Vendor Determination Checklist will be completed by CSRC employees in distinguishing between sub-recipient and vendor relationships.

7. *Appeals and Protests:*

A Party wishing to appeal/protest a contract award may submit an objection, in writing, to the President/CEO within 10 days of the award date. The written appeal to the contract award must state the specific reasons which are based on the following four criteria listed:

- clear and substantial error or misstated facts by the review team upon which the decision was made by CSRC;
- unfair competition or conflict of interest in the decision making process;
- any illegal or improper act or violation of law; or
- other legal basis on grounds that may substantially alter the CSRC Board of Directors decision.

The President/CEO will provide the information to the CSRC Executive Committee. This committee will investigate the written appeal and issue a written finding and resolution to the Party within 45 days of the receipt of the written appeal.



8. *Contract Payment:*

The terms and method of payment are specified in all contracts. Vendor contracts are usually fixed price contracts and payments are made at the satisfactory completion of the contract. Service provider contracts are cost reimbursement, fixed-unit price performance based, or a combination (hybrid) with satisfactory performance of the contract being a weighted criterion toward the continuance or renewal of the existing contract or the awarding of additional contracts. All contracts are monitored by CSRC to ensure contractors perform in accordance with the requirements of any awards.

Under cost reimbursement contracts, CSRC pays the service provider based on costs actually incurred. These costs are approved during contract negotiations through a thorough review of a line item budget and prior to the contract being awarded. Service providers are required to submit backup documentation with payments to justify the cost in relationship to the contract. The required documentation is negotiated along with other contract terms. Invoices submitted without documentation are not paid.

All payments are issued by check as follows:

To obtain payment, vendors and service providers must submit an invoice with appropriate documentation, when required, to the Finance Department. This invoice is compared with the contract terms and reviewed for accuracy and completeness. If the expenses outlined in the invoice are considered to be inappropriate for the contract, unnecessary or not reasonable, the invoice is not paid. If an invoice is incomplete or does not contain adequate documentation, the invoice may be returned to the vendor/service provider for correction prior to payment being issued. If the invoice is complete, but adequate documentation is missing for some items, a partial payment may be made for fully documented items and a request sent to the vendor/service provider for the additional documentation. The method applied is at the discretion of the CFO or designee. Decisions regarding the nonpayment of invoices or some items contained on an invoice will be sent to the vendor/service provider in writing with the reasons for nonpayment clearly described. If the invoice is complete and ready for payment, a Finance Department designee completes a voucher, attaches the voucher to the invoice and backup documentation, cuts and attaches a check and forwards the entire package to the President/CEO or Senior Vice President of Operations/COO for approval. Once approved, the package is sent back to the Finance Department for payment. Copies of all payments are maintained in the contract file.

Computerized records of each contract assist the CFO or designee in maintaining an accounting of each award, payments to date and balances.

9. *Contract File:*

Contract files contain documentation of detailed and sequential information of related major activities from the execution of the contract through close-out. At a minimum, contract files contain:

- A signed copy of the contract and all contract modifications, including supporting documentation for modification;
- Contract negotiation budgets and cost/price analysis;
- Information covering pre-award surveys or reviews and post-award conferences;
- Approval to subcontract, if applicable;
- Copies of required bonds and insurances;
- Orders issued by CSRC and CSRC's interpretation of contract provisions;
- Evidence of progress and payments to the service provider, including bills, invoices, vouchers, etc.;
- Monitoring reports and documentation of performance, including corrective action plans, responses, etc.;
- Audit reports;
- Property or equipment records, if applicable;
- Documents related to termination actions;
- Contract deliverables;
- Close-out records; and
- Other records relating to contract administration and monitoring.

All contract files will remain in CSRC's possession for the period in accordance with state and federal rules.



10. Contract Close-out:

Whenever a contract is closed, programmatic and fiscal information must be gathered and analyzed to determine whether the program goals and objectives for which services procured were accomplished and whether all funds were properly accounted for. Documentation gathered during the closeout process must be maintained as a subsection of the contract file. Closeout procedures should begin 60 days prior to contract expiration.

11. Programmatic Closeout

A programmatic closeout includes, but is not limited to, determining and documenting that:

- All deliverables and services have been delivered and accepted in writing;
- All reports (including Financial Status Report) have been received and accepted in writing;
- All program objectives agreed upon were met; and
- Liquidated damages/sanctions have been assessed for nonperformance or noncompliance.

12. Fiscal Closeout

A fiscal closeout includes, but is not limited to, determining and documenting that:

- Acquired non-expendable property has been returned to CSRC;
- Advances and/or interest earned on advances have been recovered or applied against what is owed;
- Match requirements have been met;
- Amounts assessed as liquidated damages/sanctions for nonperformance/ non-compliance have been recovered;
- Disallowed costs and/or unused grant funds have been recovered;
- Final payment to the provider is only made after all programmatic and fiscal steps have been completed;
- Required audits have been submitted and reviewed;
- All sub-contracts setup under the closed contract have been closed and settled;
- Bonds and insurance related to the contract have been canceled;
- CSRC has been released from any liabilities;
- Assign all refunds, rebates, or credits that may be due under the contract;
- Disclose any revenues earned in excess of costs, if applicable. Action may be required if funds paid are found to be in excess of costs incurred; and
- Financial Status Report has been reviewed by the CFO and approved in writing by the President/CEO or authorized designee.

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IV. PROPERTY MANAGEMENT:

CSRC's property management procedures comply with 2 CFR 200. It is CSRC's policy to account for all property purchased with state and/or federal funds. Property purchased with designated funds is used for purposes authorized by the funding sources. All purchased property is entered into an inventory of assets.

The property inventory is maintained by the President/CEO or authorized designee. Information on the inventory includes, as applicable, an identification number (property tag), description of the item, physical location, responsible individual or organization, name, make or manufacturer, year or model, manufacturer's serial number, date acquired, purchase price, condition (new, good, fair, poor), method of acquisition (including voucher number if purchased), fund source (including FAIN), who holds title, the percentage of Federal participation in project costs for the Federal award under which the property was acquired and any ultimate disposition data including the date of disposal and sale price of the property.

Property is defined as equipment, fixtures and other tangible personal property of a non-consumable and non-expendable nature purchased with designated funds and the value of which is \$5,000 or more and the normal expected life of which is one year or more. Each item in this category recorded accurately in the general ledger and records maintained in the finance department. Each year, just prior to June 30 or as soon after as is practicable, and whenever there is a change in Property Custodian, an inventory of property is completed by a person other than the Property Custodian. The inventory is compared with the property records and all discrepancies are researched and reconciled. The inventory is maintained internally and does not need to be submitted to DEO.

All real and personal property, other than supplies acquired or produced with WIOA funds by a service provider that is a commercial organization will become the property of CSRC, and will be entered into inventory. The service provider must maintain property records consistent with CSRC's policies and procedures. These records must be submitted to CSRC on a regularly scheduled basis, as specified by the contract. Service Provider inventory records will be audited by CSRC. Properties purchased with CSRC funds must be returned to CSRC if the program or service for which it was purchased is no longer operational. These properties may be transferred to other service providers at CSRC's discretion.

When purchasing large/expensive items (i.e. copiers), CSRC ensures that a maintenance contract is included or purchased to adequately maintain the property over time. Before any property is titled as "trash", CSRC employees review the property and conduct an analysis to see if the cost to repair is less than the cost to replace.

CSRC will dispose of property that is no longer useful. The President/CEO will certify the property as surplus. Surplus property will first be offered, at fair market value, to other 501(c)(3) organizations via a notification on the CSRC website. Property that is not purchased by another 501(c)(3) will be offered for sale at fair market value. Property remaining after the sale will be donated to 501(c)(3) organizations. Any unclaimed property may be cannibalized and will be properly disposed of.

CSRC will follow the disposition requirements for property acquired with federal awards identified in 2 CFR 200.313.

Property with a current per-unit fair market value of \$5,000 or less is retained, sold or otherwise disposed of with no further obligation to DEO. Property with a current per-unit fair market value in excess of \$5,000 may be retained by CSRC or sold. CSRC will request disposition instructions from DEO. CSRC may transfer title to the property to another Local Workforce Development Board.

All funds generated from the sale of property will be used to enhance program services.

Capital expenditures for general purpose equipment, buildings, and land are unallowable as direct charges, except with the prior written approval from DEO.

Capital expenditures for special purpose equipment are allowable as direct costs, provided that items with a unit cost of \$5,000 or more have the prior written approval from DEO.



Capital expenditures for improvements to land, buildings, or equipment which materially increase their value or useful life, are unallowable as a direct cost except with the prior written approval from DEO.

Special arrangements and alterations costs incurred specifically for a federal award are allowable as a direct cost with the prior approval from DEO.

Title to federally owned property remains vested in the federal government and CSRC will follow the requirements as outlined in 2 CFR 200.312.

Title to equipment acquired under a federal award will vest in the non-federal entity, subject to the conditions set forth in 2 CFR 200.313.

Equipment will be used by CSRC in the program or project for which it was acquired as long as needed, whether or not supported by the federal award, and CSRC will not encumber the property without prior approval of the federal awarding agency. CSRC will follow the requirements as outlined in 2 CFR 200.313.

Title to supplies will vest in CSRC upon acquisition. If there is a residual inventory of unused supplies exceeding \$5,000 in total aggregate value upon termination or completion of the project or program and the supplies are not needed for any other federal award, CSRC will retain the supplies for use on other activities or sell them, but must, in either case, compensate the federal government for its share. The amount of compensation will be computed in the same manner as for equipment.

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V. RECORDS MANAGEMENT, NETWORK SECURITY AND CONFIDENTIALITY:

A. Records Management, Retention and Disposal:

CSRC follows 2 CFR 200.333 retention requirements for records.

B. Management Information System:

CSRC, its service providers and partners participate in and utilize the statewide Management Information System (MIS), which is maintained and supported by DEO. The statewide MIS applications include: One Stop Management Information System (OSMIS), One Stop Service Tracking (OSST), Employ Florida Marketplace (EFM) and Project Connect. Applicant and participant data are entered into these systems and transmitted daily. For each program year, applicant and participant characteristics, program activity, and outcome data, including available follow-up information on all participants exiting programs during the program year will be reported.

Access to the DEO MIS system gives CSRC, its service providers and partners electronic access to participant record and reports compiled by DEO. Management reports and tracking information are retrieved from the DEO MIS as needed. These reports are used to assess CSRC's progress toward meeting program goals.

CSRC's local MIS includes a financial component that consists of a human resources and fund accounting application. This application handles payroll and accounting records and reports for CSRC and its employees. All monthly financial reporting and cash advance requests are completed using OSMIS.

C. Terminals Connected to State System

CSRC owns and supports workstations that are located throughout the three-county LWDA. All workstations have internet connectivity for access to the DEO MIS.

D. Nondiscrimination Regulations:

Client and employment-related files are kept for a minimum of five years from the close of the applicable program year or, if part of an investigation of a complaint of alleged discrimination, a minimum of three years from the completion of that investigation. Files are kept longer if requested by the Director of the Civil Rights Center, United States Department of Labor. The information contained in the files is made available only to authorized individuals, in accordance with applicable federal and state regulation. Employment-related data for applicants and terminations, as well as for employment actions such as promotions and transfers, are maintained for a minimum of five years.

E. Confidentiality and Security of Records:

Confidential information is not released unless specifically authorized by law. All subpoenas and public records requests received are forwarded to CSRC's administrative office. CSRC will provide guidance on those requests based on state law, regulations and guidance.

F. Security and Intrusion Protection:

In compliance with NIST risk management guidelines and DEO protocol 5.05.02.09, CSRC will conduct vulnerability assessment and analysis at least annually to ensure all internal/external points of entry are secure. CSRC will thoroughly document any/all testing completed during either an internal or a 3rd party scheduled assessment. Documentation can be made available upon request.

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VI. GRIEVANCE PROCEDURES:

A. Customers/Clients:

The grievance procedures for customers are outlined in the Grievance Complaint Process form for customers and clients. CSRC will follow this process and update as required.

B. Vendors/Service Providers/ Partners:

The above may file a grievance/complaint with CSRC by first contacting the Administrative Office.

If the appropriate CSRC designee is unable to resolve the grievance/complaint within 10 calendar days of receiving the grievance/complaint, it will be elevated to the President/CEO or in the case of contract negotiations and changes in contract awards to the CSRC Executive Committee. If the grievance/complaint cannot be resolved within 10 calendar days at this level, the grievant/complainant may elevate the grievance/complaint to the CSRC chairperson, in writing. The written explanation must be concise and include facts, laws, procedures, etc., that the grievant/complainant believes to be relevant for review. The grievant/complainant must include the mailing address where official notices related to the complaint are to be mailed. The CSRC Executive Committee will hear the grievance/complaint and issue a decision within 60 days of hearing the grievance/complaint. The meeting notice and the CSRC Executive Committee's decision will be sent to the grievant/complainant certified mail, return receipt requested.

If the grievant/complainant is dissatisfied with the CSRC Executive Committee's decision or fails to make a decision or review the grievance/complaint within the 60 calendar days, the grievant/complainant may elevate the grievance/complaint via a written letter sent certified mail, return receipt to the Department of Economic Opportunity, Office of General Counsel, 107 E Madison St, MSC 110, Caldwell Building, Tallahassee, FL 32399-4128.

C. CSRC Employees:

Employees are expected to lodge complaints with their immediate supervisor. The supervisor is responsible for either resolving the complaint informally within 5 working days or elevating the complaint, in writing, to the Human Resources Department, if the supervisor is unable to resolve the complaint.

A Human Resources Department designee will attempt to resolve the complaint within 5 working days and to communicate the resolution, in writing, with both the supervisor and the employee at the end of the resolution period. If the Human Resources Department designee is unable to resolve the complaint, the Human Resources Department designee will elevate the complaint to the President/CEO.

The President/CEO will review all research and recommendations regarding the complaint, conduct additional research into the complaint, if necessary, and make a determination of resolution within 5 working days of receiving the complaint. The President/CEO's decision will be communicated in a joint meeting between all appropriate parties affected by the complaint and a written resolution will be provided to the employee who originally lodged the complaint with copies to the employee's supervisor and the Senior Vice President of Operations/COO. The President/CEO's decision is final.

If an employee's complaint involves the employee's immediate supervisor, the employee may file a written complaint directly with the Human Resources Department who will attempt to resolve the complaint. If a Human Resources Department designee is unable to resolve the complaint, the complaint is elevated to the President/CEO who will resolve the complaint and notify all appropriate parties, in writing, of the resolution.



A complaint by an employee of alleged discrimination on the basis of race, religion, national origin, sex, disability, or age shall be processed in the following manner:

- Within 20 calendar days of the occurrence of an alleged incident of discrimination by an employee of CSRC against another employee, the employee may file a written complaint with the Equal Opportunity (EO) Officer setting forth the date of the alleged incident. Other details not filed within this period shall be deemed untimely and shall not be processed.
- The EO Officer will investigate the complaint and issue a written ruling within 20 calendar days of receipt of the complaint.
- The employee may appeal the ruling to the President/CEO, or his/her designee, within 10 calendar days following receipt by the employee of the ruling. Any appeal not filed in a timely manner shall not be processed.
- The President/CEO, or his/her designee, shall review the ruling and conduct such further investigation as may be appropriate. The President/CEO's disposition of the complaint shall be issued within 20 calendar days.
- The employee may appeal the President/CEO's decision to the CSRC Executive Committee within 15 calendar days of the receipt by the employee of the President/CEO's decision, by filing a request for hearing before the committee. Any appeal not filed in a timely manner shall not be processed.
- The committee hearing shall be governed by the applicable CSRC Executive Committee rules. The decision of the committee shall be considered final agency action for purposes of judicial review.

An employee who fails to comply with the timeliness requirements for filing appeals as contained herein shall be deemed to have accepted the ruling or decision at the given level as satisfactory and acceptable, and to have waived the right to appeal further.

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VII. MONITORING, OVERSIGHT AND EVALUATION PLAN:

CSRC is responsible for monitoring all functions of administration and program operations. Monitoring will ensure maximum effectiveness and efficiency of all management, programmatic and fiscal systems and should ensure that abuses in program operations are identified in a timely manner, resulting in the prevention and/or elimination of any misuse of funds. CSRC contracts with an independent monitoring firm to review any potential programmatic and/or financial issues. All independent monitoring is coordinated through the CFO for fiscal and the Senior Vice President of Operations/COO for programs. CSRC will ensure that sub-recipients submit the required audit reports in accordance with 2 CFR 200.

A. Internal Programmatic Monitoring Team:

CSRC utilizes various team members with programmatic experience to ensure that programs are in compliance with federal/state/local regulations. The internal monitoring team is responsible with ensuring compliance with laws, regulations, policies and procedures. On a program year basis, a monitoring schedule is developed to ensure all programs are monitored regularly. Any issues discovered are reported to the Senior Vice President of Operations/COO and any service providers. Responsible parties are required to answer all written monitoring reports within 10 working days outlining the following:

- The action that was taken;
- Dates that the actions were taken;
- Preventative measures to reduce monitoring findings; and
- All needed documentation as noted in the written monitoring report.

Follow-up continues until all parties are confident all issues and problems are resolved. Records of all internal monitoring reports are maintained by CSRC.

The monitoring team will write a monitoring report that highlights the visits, the issues identified, and steps to resolve the issue. Periodically, the Senior Vice President of Operations/COO shares that report with the CSRC Program and Services Committee.

CSRC has developed a Procedure for Internal Monitoring, which details the following: the composition of the monitoring team; the schedule for monitoring, the programs, services, systems and items that will be monitored; the corrective actions to be taken as needed; and the reporting and documentation required.

B. Independent Monitoring Firm:

The monitoring firm meets with the CSRC team prior to any review to ascertain areas of concern and to obtain records collected in advance of the monitoring visit. The monitors review samples of programmatic and/or financial records using guidelines and checklists developed by the state and their staff to determine compliance with laws, regulations and policies.

1. *Monitoring Schedule:*

Each program and service provider is monitored onsite on a regular basis, but not less than once annually. An initial monitoring visit is conducted within 4 months of the start date of any program or contract or before the end of the contract in cases where the duration of the contract is less than four months unless extraordinary circumstances preclude this timeframe. At an exit interview held with the CSRC team and service providers, the monitors review their observations and findings and offer suggestions for improvement.

2. *Monitoring Reports:*

All monitoring visits are documented with a written report that includes the areas monitored, observations, significant findings and recommendations noted by the monitor. The fiscal staff reviews the monitoring reports prepared by the independent monitoring firm. The report outlines the results of the monitoring review and any corrective action necessary. The CSRC fiscal team is required to respond in writing to all findings and/or observation with a Corrective Action Plan. The Corrective Action Plan is reviewed by the Senior Vice President of Operations/COO and within 20 working days forwarded to the firm. The firm reviews the Corrective Action Plan and sends its reaction(s) to CSRC within 10 working days of receipt. Summaries of Findings and actions taken will be provided to the appropriate CSRC committee(s).



3. *Follow-up:*

Follow-up proceeds according to the Corrective Action Plan and continues until all findings are satisfactorily resolved. Follow-up is completed by the CSRC team. The CSRC team reports any unresolved findings to the CSRC Executive Committee.

C. Corrective Action Plans and Follow-Up:

CSRC requires employee(s) and service provider(s) who are found to be out of compliance with any contractual agreements, the law, and/or program regulations to complete a Corrective Action Plan. They are required to respond in writing with a Corrective Action Plan within 20 working days from the request of CSRC.

A Corrective Action Plan should outline the following:

- The problem or issue;
- The proposed solution with preventative measures;
- The implementation timeframe;
- The expected outcome;
- Monitoring steps to ensure progress; and
- How success will be monitored.

Once a Corrective Action Plan is received by CSRC, the plan will be reviewed by the appropriate CSRC team. Once the plan is accepted by the CSRC team, the employee(s) or service provider(s) will be asked to execute the Corrective Action Plan. The CSRC monitoring team will track the progress of the Corrective Action Plan and provide feedback to employee(s) or the service provider(s). Any/all Corrective Action Plans and follow-up information will be shared with the appropriate CSRC committee(s).

D. Technical Assistance and Guidance:

CSRC provides technical assistance and guidance in the areas of management, programmatic and fiscal systems to service providers upon written request or demonstrated need. When a request is received, or a demonstrated need is identified such as following a monitoring review, the service provider is contacted and an interview is scheduled. The purpose of the interview is to identify the areas where technical assistance is needed, identify and assign a monitoring team to be involved, set a timetable for completing assistance, and establish benchmarks or goals that are to be achieved. A written plan for technical assistance is completed with the service provider and filed with CSRC. Entrance and exit interviews are held with the appropriate parties to facilitate planning and follow-up of the technical assistance. Follow-up continues until both CSRC and the service provider are confident all issues and problems are resolved. Records of all technical assistance are maintained by CSRC.

For its own service-delivery employees, CSRC provides specialized training necessary for employees to perform their assigned functions.

E. Review and Evaluation of Employees and Service Providers:

CSRC reviews the progress and success of its employees and service providers through quarterly reports. These quarterly reports cover the performance and expenditures of employees and service providers and the CSRC team compares outcomes, success rates, cost effectiveness and the employee or service provider value to the community based on monitoring reports and information obtained from the DEO MIS. The President/CEO reviews all reports prior to review by the CSRC Executive committee and makes recommendations regarding employees or service provider's performance.

F. Program Quality and Outcomes:

CSRC ensures that employees and service providers achieve program quality and outcomes that meet the objectives of federal, state and local programs and of the CSRC Board of Directors by providing technical assistance and guidance, as needed; regularly monitoring; comparing results with CSRC, federal and state standards, and requiring corrective actions when necessary; following up to ascertain that corrective actions are completed, and documenting progress through regular reporting to CSRC. Service provider contracts include the required outcomes and quality standards required by CSRC and has assigned goals so there is no question as to what performance is expected.



G. De-obligation of Funds and Cancellation of Contracts:

A service provider's contract may be terminated immediately, in whole, or from time-to-time, in part, if CSRC determines that the service provider failed to:

- Provide any of the contracted services; or
- Comply with the provisions of the contract; or
- Perform in whole or part, or failed to make sufficient progress so as to endanger performance of the service provider's obligations to operate the contracted service or program; or
- Termination is in the best interest of the CSRC Board of Directors.

The service provider will be notified by registered mail, return receipt requested. The termination will be effective immediately and the service provider will be given 30 days after the termination to close out the contract.

If the service provider disagrees with the reasons for termination, they may file a grievance in writing within 10 days of Notice of Termination to the Treasure Coast Workforce Consortium. The Consortium will conduct a grievance hearing and decide, from the evidence presented by both parties, the validity of termination. Upon termination, the contract is considered canceled and all remaining funds de-obligated.

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VIII. NONDISCRIMINATION AND EQUAL OPPORTUNITY COMPLIANCE:

CSRC adopted policies and procedures related to Nondiscrimination and Equal Opportunity Compliance. CSRC and its service providers are required to comply with all nondiscrimination and equal opportunity rules and regulations contained in Title VI of the Civil Rights Act of 1994 and the nondiscrimination and equal opportunity requirements of the WIOA.

CSRC is committed to the principle and practice of equal opportunity and affirmative action and intends to comply with the letter and spirit of federal, state and local laws and regulations prohibiting discrimination based on race, color, religion, political affiliation or belief, national origin, sex, disability, age or marital status and for beneficiaries only, citizenship and participation in programs funded by CSRC. Participation in programs and activities is open to citizens and nationals of the United States, lawfully admitted permanent resident aliens, lawfully admitted refugees and parolees and other individuals authorized by the United States Attorney General to work in the United States. All employment and training programs are conducted under the principles of fair employment practices, equal opportunity and affirmative action. All individuals involved in the personnel process, including any persons having the authority to hire and promote, are responsible for making decisions consistent with this policy. CSRC accepts responsibility for informing employees and sub-recipients of this policy and requiring sub-recipients to comply with the policy's intent when carrying out their respective CSRC-funded activities.

CSRC has designated an Equal Opportunity (EO) Officer and this officer has received training in Civil Rights legislation. Any required EO reports are completed by the EO Officer. Copies are maintained and made available to the State EO Officer or compliance review staff upon request. A log of discrimination complaints is maintained by CSRC's EO Officer. The EO Officer will notify the Office of Civil Rights of any pending civil rights litigation.

CSRC requires all employees and service providers to comply with all applicable laws and regulations including the Civil Rights legislation and attaches General Provisions and Assurances to this effect in each service provider contract. Employees and Service Providers are expected to provide equitable services per a Non-Discrimination and Equal Opportunity Provision Assurance. CSRC requires employees and service providers to coordinate and participate in other community programs to ensure equitable services. CSRC requires employees and service providers to collect and enter customer information regarding race/ethnicity, sex, age and disability status into the state's automated data system per the training and employment plans and contracts. During monitoring, employees and service provider's compliance with the assurance statement will be checked. Facilities will be reviewed in accordance with federal and state accessibility requirements as well as checked for ADA compliance. For service provider(s), these affirmative action plans and grievance procedures will also be reviewed. A Corrective Action Plan will be required if the service provider is out of compliance. If an employee is out of compliance, a supervisor will take disciplinary action against the person violating non-discrimination and EEO rules.

When advertising job opportunities with CSRC, all advertisements include "EEO/AA" and "auxiliary aids and services are available upon request to individuals with disabilities" in the advertisement and CSRC's solicitations include open invitations to minority vendor/service providers.

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IX. CERTIFICATION REGARDING DEBARMENT AND SUSPENSION

CSRC uses the following language for service provider/vendor debarment and suspension certification:

1. The Service Provider certifies to the best of its knowledge and belief, that it and its principal:
 - A. Are not presently debarred, suspended, proposed for debarment, and declared ineligible or voluntarily excluded from covered transactions by any federal department or agency.
 - B. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with:
 - obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction, or contract under a public transaction;
 - violation of federal or state antitrust statutes; or
 - commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statement, or receiving stolen property.
 - C. Are not presently indicted for, or otherwise criminally or civilly charged by a government entity (federal, state, or local) with commission of, any of the offenses enumerated in paragraph (1)(B) of this certification; and
 - D. Have not, within a three-year period preceding this application/proposal/contract, had one or more public transactions (federal, state, or local) terminated for cause or default.
2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall submit an explanation to the council.

Service Provider

Name and Title of Certifying Representative

Signature of Certifying Representative

Date



X. INTERLOCAL AGREEMENT AND MEMORANDUMS OF UNDERSTANDING:

CSRC operates through an Inter-Local Agreement with the Treasure Coast Workforce Consortium, a group of three county commissioners appointed by their respective county commissions as representatives of the local elected officials.

The local One-Stop Career Center system includes a variety of community-based partners. CSRC's working relationship with these partners operates according to a Memorandum of Understanding among the partners.

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XI. **SARBANES-OXLEY ACT OF 2002:**

A. Audit Committee

The CSRC Executive Committee acts as the Audit Committee. The committee's responsibilities include:

- Oversight of the integrity of CSRC's financial management system;
- Procuring external auditors;
- Reviewing and approving all audits;
- Reviewing and resolving audit concerns;
- Retaining outside counsel, auditors, investigators, or other experts to fulfill its responsibilities; and
- Assuring internal controls adequate to prevent fraud and abuse.

B. Certification of Monthly Financial Statements

The President/CEO, Senior Vice President of Operations/COO and CFO will review interim financial statements which are presented to the CSRC Executive Committee.

C. Auditing Firm

Auditing services are competitively procured by CSRC. Auditing firms are procured every five years, or less, depending on the performance of the auditing firm. Auditing firms are prohibited from providing non-auditing services, unless those services are pre-approved by the CSRC Executive Committee, acting as the Audit Committee. The auditing firm is required to disclose all critical accounting policies and practices within the organization, as well as share any discussions with management about such policies and practices, to the committee.

To avoid conflicts of interest, CSRC's President/CEO, any Senior Vice President and/or Vice President, and all current CSRC Finance Department employees cannot have worked for the auditing firm for one year preceding the audit.

D. Whistleblower Protection Policy

It is CSRC's policy that each CSRC Board member, volunteer, and employee of CSRC, or its service provider(s), report any questionable or improper accounting or auditing matters, and violations of CSRC's Code of Conduct. No CSRC Board member, volunteer or employee of CSRC who, in good faith, reports a concern shall be subject to retaliation or, in the case of an employee, adverse employment consequences.

Anyone reporting a concern must act in good faith and have reasonable grounds for believing the information disclosed indicates an improper accounting or auditing practice, or a violation of the Code of Conduct. The act of making allegations that prove to be unsubstantiated, and that prove to have been maliciously, recklessly, or with the foreknowledge that the allegations are false, will be viewed as a serious disciplinary offense and may result in discipline, up to and including dismissal from the volunteer position, or termination of employment. Such conduct may also give rise to other actions, including civil lawsuits. The knowing destruction, alteration, mutilation, or concealment of any record, document, or tangible object with the intent to obstruct or influence an investigation of a concern or the proper administration of matters necessary to resolve the concern is considered a violation of CSRC's Code of Conduct and may result in disciplinary action. Such conduct may also give rise to other actions, including civil lawsuits.

Any volunteer or employee who retaliates against someone who has reported a concern in good faith is subject to discipline up to and including dismissal from the volunteer position or termination of employment.

The President/CEO is responsible for reporting all concerns and making recommendations to the CSRC Executive Committee. The CSRC Executive Committee, acting in the role of an Audit Committee, is responsible for investigating and taking corrective action on all concerns, or, as appropriate, to make corrective action recommendations to the CSRC Board of Directors on all reported concerns.

Concerns and investigations pertaining to the concerns are kept confidential to the extent possible, consistent with the need to conduct an adequate investigation. Disclosure of reports of concerns to individuals not involved in the investigation is viewed as a serious disciplinary offense and may result in discipline, up to and including termination of employment.



To report concerns, employees must first discuss their concern with their immediate supervisor. If after speaking with the supervisor, the employee has reasonable grounds to believe he/she has a valid concern and is not satisfied with the supervisor's response, the employee must report the concern to the Senior Vice President of Operations/COO. If an employee is uncomfortable speaking with his/her immediate supervisor, or the supervisor is the subject of the concern, the concern should be reported directly to the Senior Vice President of Operations/COO.

All concerns must be submitted in writing. Supervisors and the Senior Vice President of Operations/COO must report any concerns immediately to the President/CEO, or the CSRC Board of Director's Chairperson if the President/CEO is the subject of the concern.

If the supervisor or Senior Vice President of Operations/COO does not report the concern immediately to the President/CEO, the employee should directly report the concern to the President/CEO, or if the President/CEO is the subject of the concern, to the CSRC Board of Director's Chairperson.

Concerns may be submitted anonymously in writing and sent directly to the President/CEO, unless the President/CEO is a subject of the concern, in which case the employee should send the written concern directly to the CSRC Board of Director's Chairperson.

CSRC and other volunteers should submit concerns, in writing, directly to the President/CEO unless the President/CEO is a subject of the concern, in which case, the concern should be submitted to the CSRC Board of Director's Chairperson.

The CSRC Executive Committee, acting as the Audit Committee, addresses all reported concerns. Within five business days of receiving a concern, the President/CEO or the CSRC Board of Director's Chairperson, as appropriate, acknowledges receipt of the concern in writing to the individual submitting the concern, unless the concern is anonymous.

The President/CEO reports all concerns received during a month, as well as any actions taken on previously filed concerns, or the disposition of previously filed concerns to the CSRC Executive Committee, acting as the Audit Committee.

All concerns are promptly investigated by either the President/CEO, or the CSRC Executive Committee acting as the Audit Committee, as the case may be, and if warranted by the investigation and depending on the circumstances, appropriate corrective action may be taken directly by the President/CEO or the committee and reported to the CSRC Board of Directors at the next scheduled meeting.

If the President/CEO or CSRC Executive Committee, acting as Audit Committee, chooses not to take corrective action directly, the concern and recommended action is reported to the CSRC Board of Directors at the next scheduled meeting. Action taken must include a conclusion and/or follow-up with the person making the complaint resulting in complete closure of the concern.

The President/CEO and the CSRC Executive Committee, acting as Audit Committee, have the authority to retain outside legal counsel, accountants, private investigators, or any other resource deemed necessary to conduct a full and complete investigation of the allegations.

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XII. CONTINUITY OF OPERATIONS/DISASTER PREPARATION & RECOVERY

CSRC maintains a Continuity of Operations/Disaster Preparation and Recovery Plan including the following information:

- An organizational risk analysis;
- General procedures for protecting lives and assets;
- Recovery efforts;
- Continuity of operations; and
- A disclaimer.

The plan outlines the policies and procedures related to the preparation and recovery from disasters that affect CSRC's administrative office and the local One-Stop Career Center system. These policies and procedures are reviewed and updated annually by CSRC's management teams. Lessons learned from disasters are used to continuously improve the plan.

Copies of CSRC's Continuity of Operations/Disaster Preparation & Recovery Plan can be obtained at the administrative office located at 584 NW University Boulevard, Suite 100, Port St. Lucie, Florida.

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ATTACHMENT I

I. PURPOSE:

This manual contains procedures for authorizing and obtaining reimbursement of travel expenses by employees and other authorized persons of the Workforce Development Board of Treasure Coast /dba CareerSource Research Coast (CSRC). Appropriate travel is defined as critical to the CSRC mission and meets the Board of Directors expectations of fiscal constraint. All requests for approval and payment for travel expenses will be accomplished in accordance with Section 112.061, F.S. and these procedures. The requirements contained within apply to all travel whether paid for with State or Federal funds. In addition, the requirements apply whether paid by reimbursement, contractual agreements, or other methods of payment, including payment to a contractor or volunteer. All requests for approval and payment for travel expenses will be accomplished in accordance with the statutory law, administrative rules, and procedures contained herein.

II. AUTHORITY:

The authority for this manual is contained in Section 445.007(10), Florida Statutes, which requires local workforce boards to reimburse standard travel in accordance with rates established in Section 112.061, Florida Statutes, and in compliance with applicable state and federal requirements. Rule-Chapter 69I-42.007-Travel Expenses, Florida Administrative Code (F.A.C.), where applicable, has been relied on in drafting this template in compliance with Section 445.007(10), Florida Statutes.

NOTE: This manual is not intended to cover all possible travel situations. Some situations will be addressed on an individual basis.

III. DEFINITIONS:

- A. **Authorized person or authorized traveler:** CSRC employee, board member, or other persons traveling on CSRC business who are authorized to incur travel expenses in performance of CSRC duties. This expressly includes consultants and advisers, per Section 112.061(2)(e)2, F.S.
- B. **Class A Travel:** Continuous travel of 24 hours or more away from CSRC headquarters. Overnight absence from CSRC headquarters must be reasonable and necessary to conduct CSRC business.
- C. **Class B Travel:** Continuous travel of less than 24 hours which involves overnight absence from CSRC headquarters. The travel day for Class B begins at the same time as the travel period. Overnight absence from official headquarters must be reasonable and necessary to conduct CSRC business.
- D. **Class C Travel:** Travel for short or day trips where the traveler is not away from his or her official headquarters overnight. The *Authorization to Incur Travel Expense* form is not required for Class C travel within the LWDA.
 1. Employees are required to complete the *Monthly Mileage Reimbursement* form for all Class C travel and must use Google Maps or MapQuest to calculate mileage. Only direct routes can be used and any personal side trips must be deducted. The Finance Department will keep a Standard Miles chart along with any/all Google Maps and/or MapQuest verification documentation for those trips that occur regularly to include the approved mileage between the Career Center offices within the local workforce development area. Employees should submit a reimbursement request monthly but no longer than quarterly, if approved. {Not required by Statute or Rule. Recommended Best Practice.}

NOTE: CLASS "C" TRAVEL PER DIEM OR SUBSISTENCE ALLOWANCES ARE CURRENTLY NOT TO BE REIMBURSED TO TRAVELERS. {Source: Section 112.061(15), F.S.}

- E. **Complimentary/Gratuitous Transportation:** Transportation which is provided free of charge by another CSRC authorized traveler in a travel status. A traveler shall not be allowed either mileage or transportation expenses if gratuitously transported by another traveler who is entitled to mileage or transportation expense. The traveler should still show how and with whom he/she traveled when requesting reimbursement for other costs incurred during travel.



- F. **Conference/Convention:** The coming together of persons with a common interest or interests for the purpose of deliberations, interchange of views, the removal of differences or disputes and discussion of their common problems and interests. The term also includes similar meetings such as seminars and workshops that are large formal group meetings programmed and supervised to accomplish intensive research, study, discussion and work in some specific field or on a governmental problem or problems.
- G. **Headquarters:** The headquarters of an authorized traveler assigned to an office shall be the city or town in which the office is located except that:
- 1) For Board of Directors, the headquarters is the primary address for the CSRC Administrative office. {Source: Section 112.061(4), F.S.}
 - 2) When any CSRC employee is stationed in any city or town for a period of over 30 continuous workdays, such city or town shall be CSRC headquarters and the employee shall not be allowed per diem or subsistence, as provided in this section, after the period of 30 continuous workdays has elapsed, unless this period of time is extended by the express approval of the President/CEO or his/her authorized designee. {Source: Section 112.061(4), F.S.}
 - 3) An authorized traveler may leave his/her assigned post to return home overnight, over a weekend, or during a holiday, but any time lost from his/her regular duties shall be taken as annual leave and authorized in the usual manner. The traveler shall not be reimbursed for travel expenses in excess of the established rate for per diem allowable had the traveler remained at the assigned post. However, when a traveler has been temporarily assigned away from CSRC headquarters for an approved period extending beyond 30 days, the traveler shall be entitled to reimbursement for travel expenses at the established rate of one round trip for each 30-day period actually taken to his/her home in addition to pay and allowances otherwise provided. {Source: Section 112.061(4), F.S.}
- H. **Travel Advances:** An advance disbursement of funds prior to actual travel.

IV. **AUTHORITY TO INCUR TRAVEL EXPENSES:**

Section 112.061(3)(a), Florida Statutes, states: *All travel must be authorized and approved by the head of the agency, or his or her designee, from whose funds the traveler is paid. The head of the agency shall not authorize or approve such a request unless it is accompanied by a signed statement by the traveler's supervisor stating that such travel is on the official business of the state and also stating the purpose of such travel. (For a Local Workforce Development Board (LWDB), the "Head of the Agency" is the Board of Directors. In compliance with this provision, the LWDB may designate either a board member or a board employee to authorize travel expenses. A board is not a state agency.)*

Section 112.061(3)(b), Florida Statutes, states: *Travel expenses of travelers shall be limited to those expenses necessarily incurred by them in the performance of a public purpose authorized by law to be performed by the agency and must be within the limitations prescribed by this section.*

Section 445.007(10), Florida Statutes, states: *Preapproved, reasonable and necessary per diem allowances and travel expenses may be reimbursed. Such reimbursement shall be at the standard travel reimbursement rates established by s. 112.061 and shall be in compliance with all applicable federal and state requirements.*

2 CFR Part 230, Appendix B, Selected Items of Cost, paragraph 51 states:

- a. *General. Travel costs are the expenses for transportation, lodging, subsistence, and related items incurred by employees who are in travel status on official business of the non-profit organization. Such costs may be charged on an actual cost basis, on a per diem or mileage basis in lieu of actual costs incurred, or on a combination of the two, provided the method used is applied to the entire trip and not to selected days of the trip, and results in charges consistent with those normally allowed in like circumstances in non-profit organization's non-federally-sponsored activities.*

- A. An Authorization to Incur Travel Expense form must be completed and approved by the Board of Directors or assigned designee for ALL travel prior to the beginning date of travel. This includes Travel Advances. {Source: Sections 445.007(10) (12), & 112.061(11), F.S.}



- B. Refer to CSRC's Administrative Plan, published by CSRC, to confirm who is authorized to approve travel.
- C. The authorization form should include, but not be limited to:
- 1) Name of each traveler,
 - 2) Purpose of the travel,
 - 3) Estimated, itemized cost to CSRC and
 - 4) Statement of benefits accruing to CSRC by virtue of such travel. {Source: Section 112.061(11), F.S.}
- D. Attached to the form should be a copy of the program or agenda of the convention or conference, itemizing the registration fees, and any meals or lodging included in the registration fee. {Source: Section 112.061(11), F.S.}
- E. The form is required to be signed by the traveler and the traveler's supervisor stating that the travel is to be incurred in connection with CSRC business. {Source: Section 112.061(11), F.S.}
- F. A copy of the completed form shall be included as support for the travel reimbursement voucher. {Source: Section 112.061(11), F.S.}
- G. CSRC may pay for travel expenses of candidates for executive or professional positions, where written approval of the Board of Directors or their designee is obtained. {Source: Section 112.061(3)(d), F.S.}

V. MEALS AND PER DIEM:

- A. Reimbursement for meals is only allowable when in authorized Class A or Class B travel status and for those who are approved for reimbursement of those meals, as included in Section IV above. Reimbursement of meals for Class C travel status is not allowed. {Source: Section 112.061, F.S and 445.007(10), F.S.}
- B. Per Section 112.061(6), F.S. (2013), the current approved meal allowance rates are as follows:
- Breakfast - \$6.00 (*When travel begins **BEFORE** 6 a.m. and extends **BEYOND** 8 a.m.*)
 - Lunch - \$11.00 (*When travel begins **BEFORE** 12 noon and extends **BEYOND** 2 p.m.*)
 - Dinner - \$19.00 (*When travel begins **BEFORE** 6 p.m. and extends **BEYOND** 8 p.m.*)
- C. In determining the starting or ending time for the travel event, the time of day is important. When returning during work hours, the official work site location should be the return destination, unless otherwise approved by the President/CEO or his/her designee. If returning after or before work hours, the destination, and therefore the point when travel concludes, is the traveler's home. The same considerations apply for determining when travel begins.
- D. When a meal is included in a registration fee, the meal allowance must be deducted from the reimbursement claim, **even if the traveler decides for personal reasons not to eat the meal**. As provided in Attorney General Opinion 081-53, a continental breakfast is considered a meal and must be deducted if included in a registration fee. {Source: Section 112.061(6)(c), F.S.}
- E. In the case where a meal is provided by a hotel or airline to all guests, the traveler will be allowed to claim the meal allowance by law.
- F. Per diem may be used to calculate reimbursement due for days of travel which do not include hotel costs, for example, the final day of a trip. The allowable rate for per diem is currently eighty dollars, as provided for in Section 112.061(6)(a)1, F.S. (2013) All claims for per diem and subsistence must be within the limitations set forth in this section of the statutes.
- G. All travelers are allowed the authorized per diem for each day of travel or if actual expenses exceed the allowable per diem, the amount allowed for meals as provided in Section 112.061(6)(b), F.S., plus actual expenses for lodging at a single occupancy rate. Per diem shall be calculated using four six-hour periods (quarters) beginning at midnight for Class A or when travel begins for Class B travel. Travelers may only switch from actual to per diem while on Class A travel on a midnight to midnight basis. A traveler on Class A or B travel who elects to be reimbursed on a per diem basis is allowed \$20.00 for each quarter from the time of departure until the time of return. {Source: 69I-42.006, F.A.C.}. Per diem is as follows:



- 12:00 AM – 6:00 AM = \$20.00
- 6:01 AM – 12:00 PM = \$40.00
- 12:01 PM – 6:00 PM = \$60.00
- 6:01 PM – 11:59 PM = \$80.00

VI. TRANSPORTATION:

Section 112.061(7)(a), Florida Statute, states: *All travel must be by a usually traveled route. In case a person travels by an indirect route for his or her own convenience, any extra costs shall be borne by the traveler; and reimbursement for expenses shall be based only on such charges as would have been incurred by a usually traveled route.*

2 CFR Part 230, Appendix B, Selected Items of Cost, paragraph 51 states:

c. Commercial air travel.

1) *Airfare costs in excess of the customary and standard commercial airfare (coach or equivalent), Federal Government contract airfare (where authorized and available), or the lowest commercial discount airfare are unallowable except when such accommodations would: require circuitous routing; require travel during unreasonable hours; excessively prolong travel; result in additional costs that would offset the transportation savings; or offer accommodations not reasonably adequate for the traveler's medical needs. The non-profit organization must justify and document these conditions on a case-by-case basis in order for the use of first-class airfare to be allowable in such cases.*

2) *Unless a pattern of avoidance is detected, the Federal Government will generally not question a non-profit organization's determinations that customary standard airfare or other discount airfare is unavailable for specific trips if the non-profit organization can demonstrate either of the following: that such airfare was not available in the specific case; or that it is the non-profit's organization's overall practice to make routine use of such airfare.*

d. Air travel by other than commercial carrier. Costs of travel by non-profit organization-owned, - leased, or -chartered aircraft include the cost of lease, charter, operation (including personnel costs), maintenance depreciation, insurance, and other related costs. The portion of such costs that exceeds the cost of allowable commercial air travel, as provided for in subparagraph c., is unallowable

A. Travelers are encouraged to use the most economical means of travel when feasible. The most economical mode of travel is determined by the following conditions:

1. The nature of the business. {Source: Section 112.061(7), F.S.}
2. The most efficient and economical means of travel, considering time of the traveler, impact on the productivity of the traveler, cost of transportation, and per diem or subsistence required. {Source: Section 112.061(7), F.S.}
3. The number of persons making the trip and the amount of equipment or material to be transported. {Source: Section 112.061(7), F.S.}
4. Authorized travelers with a common destination are required to consider and evaluate joint utilization of vehicles. Approval for anything other than joint utilization must be requested in advance via the Authorization to Incur Travel Expense form and must include justification. {Not required by Rule or Statute. Recommended Best Practices.}

B. Airline Travel

- 1) Travel agency surcharges may be reimbursed as long as properly justified and a receipt is provided.
- 2) The traveler must provide a passenger receipt to be reimbursed for his/her airfare. An itinerary is acceptable as a receipt for electronic tickets. {Not required by Rule or Statute. Recommended Best Practices.}
- 3) Penalty for cancellation or exchange of a ticket may be paid by CSRC, only if the cause for the cancellation is in the best interest of CSRC, or if the cancellation is due to illness of the traveler or illness or death of a member of the traveler's immediate family. Justification should be included with the request for reimbursement. {Source: 69I-42.007(5), F.A.C.}



- 4) Transportation by chartered vehicles (including airplanes, buses, etc.) when traveling on CSRC business may be authorized when necessary or where it is to the advantage of CSRC, provided the cost of such transportation does not exceed the cost of transportation by privately owned vehicle, as allowed under Section 112.061(7)(d), F.S. {Source: Section 112.061(7)(e), F.S.}.
- 5) A traveler on a private aircraft shall be reimbursed the actual amount charged and paid for the fare for such transportation up to the cost of a commercial airline ticket for the same flight. The owner or pilot of such aircraft is also entitled to transportation expense for the same flight. {Source: Section 112.061(7)(h)}

C. Rental Cars

- 1) Enterprise is the state of Florida contract vendor for renting vehicles and should be used unless:
 - a. The use of another rental company provides lower net rates that include primary insurance coverage as listed in Enterprise contract, payment of the collision damage waiver fee and controlled fuel price; or
 - b. When Enterprise cannot provide vehicles; or
 - c. When it is not feasible due to travel time or distance to an Enterprise rental company.
- 2) Vehicles rented from companies other than Enterprise must include primary insurance coverage. Inquire prior to rental to verify primary insurance coverage is provided. All major rental companies provide primary insurance coverage but many small companies provide secondary coverage with the renter's personal vehicle insurance coverage serving as primary.

NOTE: Traveling employees should purchase collision damage insurance if a vehicle is rented from a vendor other than Enterprise.

- 3) Rental vehicles should be rented as close to the time of departure as reasonably allowed. Furthermore, rental vehicles should be returned as soon as possible upon the traveler's return. Failure to do so may result in a reduction of the reimbursement. {Not required by Rule or Statute. Recommended Best Practice.}
- 4) In areas where a non-airport rental facility exists at a comparable proximity, the non-airport facility should be used in order to avoid airport fees and surcharges. {Not required by Rule or Statute. Recommended Best Practice.}
- 5) The cost of the vehicle should be reasonable and necessary for the number of travelers, the type of travel, and the distance to be traveled. {Not required by Rule or Statute. Recommended Best Practice.}

D. CSRC/personal vehicles

- 1) Employees traveling to a common destination are required to consider and evaluate joint utilization of vehicles. Approval for anything other than joint utilization must be requested in advance via the *Authorization to Incur Travel Expense* form and must include justification. {Source: Section 112.061(7), F.S.}
- 2) CSRC-owned vehicles should be used when practical and available. {Not required by Rule or Statute. Recommended Best Practice.}
- 3) If travel is performed by a CSRC vehicle, "BOARD" should be entered in the map mileage column of the travel voucher. {Not required by Rule or Statute. Recommended Best Practice.}
- 4) If travel is complimentary, "COMP" should be entered in the map mileage column of the travel voucher. No reimbursement shall be made for gratuitous transportation. {Source: Section 112.067(7)(h) & Recommended Best Practice.}
- 5) Use of personal vehicles must be approved in advance via the *Authorization to Incur Travel Expense* form. {Source: Section 112.061(3)(a), 445.007(10), & Recommended Best Practice.}
- 6) The traveler is entitled to mileage allowance at a fixed rate of 44.5 cents per mile when using a personal vehicle. The reimbursement for expenditures related to the operation, maintenance, and ownership of a vehicle shall



not be allowed when privately owned vehicles are used in public business and reimbursement is made via mileage allowance. {Source: Section 112.061(7)(d), F.S.}

- 7) Employees are required to use the *Voucher for Reimbursement of Travel Expenses* form and Map mileage claimed may be from point of origin to destination based Google Maps, MapQuest or by using the official DOT highway map located at the web site below.

<http://www2.dot.state.fl.us/CityToCityMileage/viewer.html>

- 8) Vicinity mileage necessary to conduct CSRC business must be shown separately on the *Voucher for Reimbursement of Travel Expenses* form. Justification must be provided if the traveler logs vicinity miles in excess of 30 miles per day. {Not required by Rule or Statute. Recommended Best Practice.}
- 9) Flexibility may exist when other cost savings are considered. For example, multiple travelers might carpool to avoid multiple airport parking fees. In this case, the mileage used to pick up other travelers can be claimed. {Source: 69I-42.008(4), F.A.C. & Recommendations Best Practice.}
- 10) Vicinity mileage cannot be claimed while in a rental vehicle, if the cost of that vehicle is reimbursed by CSRC. Reimbursement shall be for the cost of mileage or the cost to rent the vehicle, whichever is more economical and authorized by the appropriate CSRC designee. {Source: Section 112.061, (7)(d)1, F.S.}
- 11) An employee may claim mileage from his/her home to a work location outside his/her official headquarters provided that travel begins more than one hour before or one hour after the traveler's regular work hours and provided the miles claimed do not exceed the miles actually driven. {Source: 69I-42.008(4), F.A.C.}
- 12) CSRC is not responsible for reimbursing parking fines or fines for unlawful driving. {Source: 2 CFR 230, Appendix B, Paragraph 16 (OMB A-122)}

VII. LODGING EXPENSES:

2 CFR Part 230, Appendix B, Selected Items of Cost, paragraph 51 states:

b. Lodging and subsistence. Costs incurred by employees and officers for travel, including costs of lodging, other subsistence, and incidental expenses, shall be considered reasonable and allowable only to the extent such costs do not exceed charges normally allowed by the non-profit organization in its regular operations as a result of the non-profit organization's written travel policy

- A. An **itemized** hotel receipt must be submitted to claim reimbursement (**a credit card receipt is not sufficient**). {Source: 69I-42.006, F.A.C.}
- B. All other reimbursable expenses included on a hotel receipt, such as parking or phone calls, should be properly listed in the incidental column of the travel voucher. {Source: Recommended Best Practice}
- C. Employees can only be reimbursed at the single occupancy rate. {Source: Section 112.061(6)(a)2, F.S.}
- D. Overnight lodging may not be reimbursed if travel is within the employee's headquarters or residence, unless the circumstances necessitating overnight travel are fully explained by the traveler and approved by the President/CEO or designee. Criteria for approval shall include late night or early morning job responsibilities and excessive travel time because of traffic conditions. {Source: 69I-42.006(7)}

VIII. REIMBURSABLE INCIDENTAL EXPENSES:

The below expenditure types, detailed in 69I-42.010, F.A.C., are required to be accompanied with a receipt, unless otherwise noted. These expenses should be listed in the incidental column of the travel voucher.



- A. Taxi fares in excess of \$25, on a per fare basis, require a receipt. Amounts less than \$25 do not require a receipt.
- B. Storage, parking fees or tolls in excess of \$25, on a per transaction basis, requires a receipt. Amounts less than \$25 do not require a receipt. Such fees are not allowed on a weekly or monthly basis unless it can be established that such method results in a savings to CSRC.
- C. Dry cleaning, laundry and pressing expenses when official travel extends beyond seven days and such expenses are necessary to complete the official business portion of the trip.
- D. Passport and visa fees required for official travel.
- E. Fees charged for the purchase of traveler's checks for official travel expenses.
- F. Fees for the exchange of currency necessary for official travel.
- G. Cost of maps necessary for conducting Board business.
- H. Communication expenses for business-related fax and telephone use can be reimbursed with proper justification. **Personal telephone calls made are not a reimbursable communication expense.**
- I. Tips paid to taxi drivers that do not exceed 15 percent of the taxi fare are reimbursable and do not require a receipt.
- J. Actual amount of tip paid for mandatory valet parking is not to exceed \$1 per occasion are reimbursable and do not require a receipt.
- K. Actual portage paid shall not exceed \$1 per bag not to exceed \$5 per incident are reimbursable and do not require a receipt. **Portage charges exceeding \$5 per incident will require additional justification. The number of bags must be stated on the travel reimbursement request.**
- L. Housekeeping gratuity paid shall not exceed \$5 per day and does not require a receipt.

IX. CONFERENCE / CONVENTION TRAVEL:

- A. Purpose of Conference: Public funds shall not be expended for attendance at conferences or conventions unless:
 - 1) The main purpose of the conference or convention is in connection with the business of CSRC and is directly related to the performance of statutory duties and responsibilities of CSRC. {Source: Section 112.061(6)(a), F.S. & 69I-42.004(1), F.A.C.}
 - 2) The conference or convention will provide a direct educational or other benefit supporting the duties of the traveler. {Source: 69I-42.004(1), F.A.C.}
 - 3) The duties and responsibilities of the traveler seeking to attend such meeting are compatible with the objective of the particular conference or convention. {Source: 69I-42.004(1), F.A.C.}
- B. No one, whether traveling out of state or in state, shall be reimbursed for any meal or lodging included in a convention or conference registration fee paid by CSRC. {Source: Section 112.061(7)(a), F.S.}
- C. CSRC may pay the registration fee directly to the conference or convention sponsor or allow the traveler to include the registration fee in the calculation of their travel costs and reimburse the traveler. {Source: 69I-42.004(4), F.A.C.}
- D. Documentation Needed:
 - 1) Travel to a conference or convention must be approved in advance by the Board of Directors or authorized designee. Benefits to CSRC must be indicated on the authorization. {Source: 69I-42.004(2), F.A.C.}



- 2) The approved Authorization to Incur Travel Expense form must be submitted with the travel reimbursement request. {Source: 69I-42.004(2), F.A.C.}
- 3) A copy of the program or agenda of the conference or convention itemizing the registration fees and any meals or lodging included in the registration fee shall be attached to the Voucher for Reimbursement of Travel Expenses form when submitting for payment. {Source: 69I-42.004(3), F.A.C.}
- 4) If no agenda is available, or if the agenda attached is not clear as to what is included in the registration fee, the traveler will make a statement on the Voucher for Reimbursement of Travel Expenses form as to the extent of the meals included in the registration fee. The travel reimbursement request must be reduced by the applicable meal allowance. {Source: 69I-42.004(3), F.A.C.}
- 5) Payment in advance of earlier than twenty workdays before the travel period should be accompanied by written justification, such as discounts for earlier payment or earlier payment required for reservation. {Source: 69I-42.004(4), F.A.C.}

X. TRAVEL ADVANCES:

- A. CSRC or its designee may make, or authorize the making of, advances to cover anticipated costs of travel to travelers. Such advancements may include the costs of subsistence and travel of any person transported in the care or custody of the traveler in the performance of his or her duties. {Source: 112.061(12), F.S.}
- B. An Application for Advance on Travel Expense form is required to be completed and signed by the traveler and the traveler's supervisor. {Source: Recommended Best Practices}
- C. Travel advances cannot be requested earlier than 30 days before the travel period begins without written justification of circumstances that necessitate an exception to this restriction. {Source: Recommended Best Practices}
- D. Travel advances should not be requested if employee has access to a CSRC corporate credit card, unless extenuating circumstances due to a declared emergency prevent the use of the card (ex. hurricane, power outages, etc.). Any other exception to this directive must be justified in writing and approved in advance by the Board of Directors or authorized designee. {Source: Recommended Best Practices}
- E. Travel advances requested solely to cover fuel costs are not justifiable. Use of a CSRC vehicle and associated gas card should be considered in these cases. {Source: Recommended Best Practices}
- F. When the advance travel period has ended, the traveler shall properly complete a Voucher for Reimbursement of Travel Expenses form for the travel period for which he/she received an advance, within 30 days of the traveler's return to headquarters. {Source: Recommended Best Practices}
- G. A traveler may not have more than one travel advance outstanding at any time without written justification and approval by the Board of Directors or authorized designee. {Source: Recommended Best Practices}

XI. REIMBURSEMENT OF TRAVEL EXPENDITURES BY INDIVIDUALS WITH DISABILITIES:

- A. For individuals covered under the Americans with Disabilities Act (ADA), there are special provisions for travel reimbursement that apply. {Source: 69I-42.012, F.A.C.}
- B. When a physically handicapped traveler incurs travel expenses in excess of those ordinarily authorized pursuant to Section 112.061, F.S., and such excess travel expenses were incurred to permit the safe travel of that handicapped traveler, those excess expenses will be reimbursed by CSRC to the extent that the expenses were reasonable and necessary to the safe travel of the individual. All such claims for reimbursement of excess travel expenses shall be submitted in accordance with the requirements of the Americans with Disabilities Act of 1990, 42 U.S.C. 12101 et seq. {Source: 69I-42.012, F.A.C.}



- C. When a payment is requested pursuant to the Americans with Disabilities Act, which would not otherwise be authorized travel reimbursement, the voucher must include a signed statement from the Board chair or his designee certifying that:
- 1) An employee of CSRC, an applicant for a position or other covered person has requested a “reasonable accommodation” pursuant to the ADA, to assist him in performing his duties, applying for a position, or other covered activity. {Source: 69I-42.012, F.A.C.}
 - 2) CSRC has determined that the individual is a “qualified individual with a disability” as defined in the ADA. {Source: 69I-42.012, F.A.C.}
 - 3) CSRC has determined that the payment is for a “reasonable accommodation” pursuant to the ADA, for that employee, applicant or person. {Source: 69I-42.012, F.A.C.}
 - 4) CSRC will maintain all records related to this request for seven years and make those records available for review to persons authorized to review such records. {Source: 69I-42.012, F.A.C.}
- D. All vouchers related to providing a “reasonable accommodation” shall contain a file number or other code by which the voucher can be readily traced to the confidential records maintained by CSRC pursuant to paragraph (C)(4) above. {Source: 69I-42.012, F.A.C.}

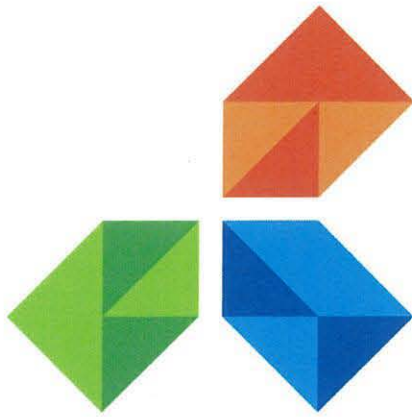
XII. SUBMISSION AND PAYMENT OF TRAVEL REIMBURSEMENTS:

The provisions below are not required by law or rule, but involve the application of recommended best practices in submission and payment of travel reimbursement requests.

- A. **The Voucher for Reimbursement of Travel Expenses should be completed in all instances even if the net amount due the traveler is zero.**
- B. Submit original and one copy of all documentation with the Voucher for Reimbursement of Travel Expenses form. This includes ALL receipts and backup documentation.
- C. Small receipts should be taped to a sheet of paper, not stapled.
- D. The Voucher for Reimbursement of Travel Expenses form should show both reimbursable expenses to the traveler and expenses already paid by the purchasing card or corporate card and notated in the appropriate areas of the travel voucher.
- E. Copies of all receipts paid with the purchasing card or corporate card must be attached.
- F. The Voucher for Reimbursement of Travel Expenses form should be submitted within 30 working days of the last day traveled.

XIII. AMENDMENTS

Travel restrictions imposed by section 112.061, F.S. {2017-18 General Appropriations Act, SB2500, Section 58 provides that, notwithstanding s. 112.061, F.S., costs for lodging associated with a meeting, conference or convention organized or sponsored in whole or in part by a state agency or the judicial branch for a state employee may not exceed 150 dollars per day. An employee may expend his or her own funds for any lodging expenses in excess of 150 dollars.}



CareerSource
RESEARCH COAST

**SUBRECIPIENT AGREEMENT FOR THE ONE-STOP OPERATOR OF THE LOCAL WORKFORCE
DEVELOPMENT AREA 20 CAREER CENTER SYSTEM**

Contract #16-004-OSO

**PERIOD OF PERFORMANCE
JULY 1, 2017 THROUGH JUNE 30, 2018**

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SUBRECIPIENT AGREEMENT FOR THE ONE-STOP OPERATOR OF THE LOCAL WORKFORCE DEVELOPMENT AREA 20 CAREER CENTER SYSTEM

Title 2 – Subtitle A – Chapter II – Part 200 – Subpart D - § 200.331: Requirements for pass-through entities.

(a) The following sub-award information is provided by CareerSource Research Coast, the Pass-Through Entity, to Career and Technical Consultants, LLC, the Sub-Recipient. If/when any of these data elements changes, the change(s) will (also) be included in any subsequent sub-award modification(s).

(1) Federal Award Identification.

| | |
|--|--|
| <ul style="list-style-type: none"> Sub-Recipient name (which must match the name associated with its unique entity identifier) | Career and Technical Consultants, LLC |
| <ul style="list-style-type: none"> Sub-Recipient's unique entity identifier | DUNS # 039118244 |
| <ul style="list-style-type: none"> Federal Award Identification Number (FAIN) | AA-(TBD)-17-55-A-12 |
| <ul style="list-style-type: none"> Federal Award Date | July 1, 2017 |
| <ul style="list-style-type: none"> Sub-Award Period of Performance: start/end dates | July 1, 2017 – June 30, 2018 |
| <ul style="list-style-type: none"> Amount of Federal funds obligated by this action | \$35,000 |
| <ul style="list-style-type: none"> Total amount of Federal funds obligated to the Sub-Recipient | \$35,000 |
| <ul style="list-style-type: none"> Total amount of Federal Award to CareerSource Research Coast | TBD |
| <ul style="list-style-type: none"> Federal award project description | One-Stop Operator |
| <ul style="list-style-type: none"> Name of Federal awarding agency Pass-through entity, and Contact information for awarding official | <u>Federal awarding agency:</u> For WIOA: U. S. Dept. of Labor through State of Florida, Dept. of Economic Opportunity <u>Pass Through Entity:</u> CareerSource Research Coast <u>Contact information:</u> Glenda Harden, COO gharden@careersourcerc.com |
| <ul style="list-style-type: none"> CFDA Number and Name | 17.258 – WIOA Adult, 17.278 – WIOA DW, 17.259 -WIOA Youth |
| <ul style="list-style-type: none"> Is this sub-award for R&D? | No |
| <ul style="list-style-type: none"> Indirect cost rate for the Federal award | N/A |

THIS AGREEMENT is entered into between Workforce Development Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast, hereinafter referred to as “CareerSource Research Coast” (CSRC) Career and Technical Consults, LLC., hereinafter referred to as the “One-Stop Operator.”

CONTRACT TERM

THIS AGREEMENT will be in effect from July 1, 2017 through June 30, 2018, provided the ONE-STOP OPERATOR meets CSRC’S performance expectations. All services must be delivered during this period to qualify as part of this Agreement. Through this Agreement, the One-Stop Operator shall provide services for CareerSource Research Coast as described in the attached Statement of Work. None of these services may be subcontracted to another party without the knowledge and approval of CareerSource Research Coast.

In return, CareerSource Research Coast shall compensate the One-Stop Operator for services rendered in an amount not to exceed **\$35,000.00** in accordance with the Payment Terms of this Agreement, unless otherwise modified by mutual consent of both parties.

This Agreement consists of pages 1, 2 and 3 and the following attachments:

- Statement of Work
- Monitoring and Evaluation
- Technical Assistance and Guidance
- Payment Terms
- Budget
- Designation of Contract Personnel
- Certification Regarding a Drug-Free Workplace
- Certification Regarding Debarment, Suspension and Other Matters
- Lobbying Certification
- Public Entity Crimes
- Non-discrimination and Equal Opportunity Provisions
- Signatory Authority
- General Provisions & Assurances

CareerSource Research Coast will provide the One-Stop Operator with copies of the Workforce Services Plan, other contracts and agreements governing the services outlined in the attached Statement of Work, and policies and procedures specific to the WIOA One-Stop System, as requested.

SIGNATURES AND ATTESTATIONS

IN WITNESS THEREOF, the parties hereto have caused this AGREEMENT and Attachments to be executed by their undersigned officials as duly authorized.

**ONE-STOP OPERATOR – CAREER AND
TECHNICAL CONSULTANTS, LLC.**

**THE WORKFORCE DEVELOPMENT BOARD
OF THE TREASURE COAST, INC. d/b/a CAREERSOURCE
RESEARCH COAST**

Kathie Schmidt
Name and Title of Certifying Representative

Brian Bauer, President/CEO
Name and Title of Representative


Signature


Signature

6/27/17
Date

6/28/2017
Date

ATTACHMENT A – STATEMENT OF WORK

1. **SUMMARY:** The One-Stop Operator's major function is the coordination of the service delivery among the required One-Stop System Partners and their programs for the Local Workforce Development Area 20 (LWDA 20), CareerSource Research Coast. The One-Stop Operator will navigate between the One-Stop Partners to ensure there is coordination of service delivery for employers and job seekers within the LWDA 20 One-Stop System.
2. **RESPONSIBILITIES:**
 1. Learn, know and understand the One-Stop Partner's program services and performance requirements.
 2. Monitor and ensure the required One-Stop Partners have Memorandum of Understandings (MOUs) in place, with the mandatory elements, as required by WIOA and described in the U.S. Department of Labor's Training and Employment Guidance Letter (TEGL) No. 16-16, are included. The roles and responsibilities of each partner must be clearly defined, current and adhered to as stated.
 3. Assist in the development of the Infrastructure Funding Agreement(s) between the required One-Stop Partners and CareerSource Research Coast's Comprehensive One-Stop Career Center.
 4. Serve as an intermediary to the required One-Stop System Partners, working with the partners of continuous improvement of the One-Stop System and fostering customer service excellence.
 5. Assure LWDA 20, as the local One-Stop System, has at least one comprehensive One-Stop Center that meets the required certification criteria as outlined in CareerSource Florida's Administrative Policy No. 93 and is compliant with all applicable state and federal regulations.
 6. Review and report on relevant information provided by the state, federal government and the required One-Stop Partners to monitor LWDA 20 One-Stop System's compliance and performance.
 7. Submit written, quarterly reports to the CareerSource Research Coast Board of Directors. The reports should include:
 - A detail of the duties performed by the One-Stop Operator during the quarter
 - The status of the required MOUs and Infrastructure Funding Agreement(s)
 - Observations made regarding the collaboration between the required One-Stop System Partners
 - Recommendations to improve the One-Stop Partner's integrated service delivery to customers
 - The identification of best practices
3. **GOALS:**
 - a) The One-Stop Operator will demonstrate knowledge of each of the required One-Stop Partner's program services and performance requirements as evidenced by facilitation of a training session for the Comprehensive One-Stop Center and partner staff. The training session will provide cross training to staff to ensure integrated, seamless services to customers. The training shall be delivered by November 1, 2017.
 - b) An "Umbrella" Memorandum of Understanding, to include Infrastructure Funding Agreement(s), established and signed by all required parties by January 1, 2018.
 - c) Meet with the Comprehensive One-Stop Career Center partners once per quarter to discuss concerns, challenges and best practices in order to ensure continuous improvement of the CareerSource Research Coast One-Stop System. Recommend any needed modifications to the MOU in writing to the Senior Vice President of Operations. Provide attendance sheets and minutes of each meeting to the Senior Vice President of Operations.
 - d) Utilizing the criteria established per CareerSource Florida's Administrative Policy # 93 and other relevant information provided by the state, federal government, monitor the Comprehensive One-Stop Career Center bi-annually to ensure compliance with the certification requirements. Submit both monitoring reports to the Senior Vice President of Operations.
 - e) Collect and review performance information and data relevant to the One-Stop delivery system. Develop agendas and meet with CareerSource Research Coast administrative staff at least once monthly to disseminate the information and data.

- f) Submit written, quarterly reports to the CareerSource Research Coast Board of Directors. The reports should include:
- A detail of the duties performed by the One-Stop Operator during the quarter
 - The status of the required MOUs and Infrastructure Funding Agreement(s)
 - Observations made regarding the collaboration between the required One-Stop System Partners
 - Recommendations to improve the One-Stop Partner's integrated service delivery to customers
 - The identification of best practices

3. **REPORTS AND EVALUATION**

The One-Stop Operator will submit written, monthly reports regarding the progress towards the established goals of this Agreement. The reports are to be submitted via email at the following intervals:

- By the 5th day of the following month;
- Upon completion of the goals of the Agreement

4. **RECORDKEEPING**

The One-Stop Operator must maintain records regarding this Agreement in sufficient detail to demonstrate compliance with the relevant contractual criteria related to this agreement. All records must be stored electronically and shared with CareerSource Research Coast.

The One-Stop Operator will maintain all records in accordance with the requirements of the Agreement with CareerSource Research Coast and established policies and laws.

The One-Stop Operator must maintain financial records sufficient to account for all funds received from CareerSource Research Coast.

All records will be made available to CareerSource Research Coast, state and federal officials, and auditors. Records will be retained for a period of three years following the date of the final report for this agreement or until all audit questions and concerns have been resolved, whichever is later.

5. **INSURANCE**

The One-stop Operator must carry general liability insurance. The One-Stop Operator, upon signing this Agreement, acknowledges that she is not a regular employee of CareerSource Research Coast and that she is responsible for her own insurance to include worker's compensation, benefits, taxes or any other costs associated with doing business with CSRC and the partner organizations of the One-Stop Delivery System.

6. **CONTRACT CLOSEOUT**

The One-Stop Operator shall comply with all provisions of CareerSource Research Coast's Contract Closeout Procedures. Closeout of the program funded under this Agreement upon termination of the Agreement shall be performed in accordance with the terms and conditions of WIOA and state regulations and procedures. Except as expressly waived by CareerSource Research Coast, closeout shall be completed prior to final payment for services performed pursuant to this Agreement. The One-Stop Operator shall provide CareerSource Research Coast such information and materials within such time periods as CareerSource Research Coast may require, necessary to complete closeout in accordance with applicable federal and state regulations and procedures.

ATTACHMENT B – MONITORING & EVALUATION

CareerSource Research Coast staff and their subcontracted monitoring/audit provider and the State of Florida's Department of Economic Opportunity (DEO) will monitor the One-Stop Operator's work for programmatic and fiscal accountability. Monitoring visits may include reviews of activities, progress reports, the One-Stop Operator's financial records, etc., as necessary to ensure the intent and guidelines of this agreement, and all applicable laws, rules and regulations are being met.

At the end of the project, the One-Stop Operator will provide CareerSource Research Coast with reports of performance measured against agreement terms. CareerSource Research Coast staff will verify that these reports are accurate and complete.

During monitoring, if the One-Stop Operator is found to be out of compliance with the terms of this Agreement, WIOA, CareerSource Research Coast policies, or any other governing document, the One-Stop Operator will complete a Corrective Action Plan. This plan will be in writing and submitted to CareerSource Research Coast within twenty (20) working days from the receipt of written notification from CareerSource Research Coast that corrective action is required. CareerSource Research Coast will either accept or reject this plan and will notify the One-Stop Operator of its decision in writing.

The One-Stop Operator will provide assistance and access to records to federal and state monitors conducting reviews, as requested. If found out of compliance during these reviews, the One-Stop Operator will provide CareerSource Research Coast with a written Corrective Action Plan addressing federal and state monitors' concerns.

All monitoring and Corrective Action plans will comply with state and federal regulations.

ATTACHMENT C – TECHNICAL ASSISTANCE & GUIDANCE

CareerSource Research Coast will provide technical assistance and guidance to the One-Stop Operator as requested in writing, or as the results of monitoring. CareerSource Research Coast staff, jointly with the One-Stop Operator, will develop a written plan for technical assistance as follows:

- Conduct a One-Stop Operator interview
- Identify areas where assistance is needed
- Identify and assign staff who are to be involved
- Set a timetable for completing assistance
- Establish benchmarks to be achieved

The One-Stop Operator will participate in entrance and exit interviews with CareerSource Research Coast staff to facilitate planning and follow-up of technical assistance.

ATTACHMENT D – PAYMENT TERMS

- 1. COMPENSATION AND TIME PERIOD:** CareerSource Research Coast will compensate the One-Stop Operator for fees incurred during the performance of responsibilities outlined in this Agreement in an amount not to exceed **\$35,000.00** if submitted to CareerSource Research Coast by June 30, 2018, unless otherwise modified. Under the terms of this Agreement, payment will be made on a **monthly basis at a fully-loaded hourly labor rate of \$33.653 (includes all costs) with 1040 estimated total hours for this project. The maximum total fee is not to exceed the total amount of \$35,000.00.** An invoice with the total hours worked each month and monthly reports of responsibilities performed are due by the fifth (5th) day of the month and payment will be made after receipt of the reports, no later than the 15th of the month.
- 2. MODIFICATION OF TERMS:** The terms of this Agreement, including total compensation, may be modified by mutual consent of both parties, if agreed-upon services, funding availability, or circumstances warrant change. Refer to General Provisions and Assurances.
- 3. CONDITIONS OF PAYMENT/PERFORMANCE STANDARDS:** It is understood and agreed by both CareerSource Research Coast and the One-Stop Operator that payment is for fees associated with fulfilling the responsibilities of this Agreement and outlined in the Statement of Work.
- 4. PERFORMANCE MEASURES:**
The Service Provider will be paid according to the negotiated terms for fees related to the fulfillment of the responsibilities and goals outlined in this Agreement. The One-Stop Operator is expected to make reasonable progress toward the Agreement goals. Reasonable progress shall mean that, at the time of monitoring, activity and outcomes are what they should be for the evaluation period.

Should it appear that reasonable progress is not being made; CareerSource Research Coast will require the One-Stop Operator to implement corrective actions. If the problem is not corrected, this Agreement may be terminated. To receive payment, the One Stop Operator must submit monthly invoices, with a report of the responsibilities performed during the month, as outlined in the Statement of Work. The total amount of the invoices may not exceed an aggregate of \$35,000.00.

When invoices and monthly reports are received, CareerSource Research Coast staff will review them for accuracy and consistency with this Agreement. If the invoices are incomplete, lack documentation or are not in compliance with the Agreement, they will be returned to the One-Stop Operator for correction. Payment will not be made to the One-Stop Operator until an acceptable invoice, along with a monthly report of responsibilities completed, is received, verified and processed.

The One-Stop Operator is responsible for maintaining accounting records related to this Agreement. These records will be audited by CareerSource Research Coast staff at the end of the Agreement. At no time will total payments exceed the total dollar amount specified in this Agreement.

- 5. PERFORMANCE SANCTIONS:** CareerSource Research Coast may impose sanctions on the One-Stop Operator depending on performance determined during monitoring and evaluation. Sanctions will be imposed if goals and objectives are not met. Sanctions may include immediate termination of the Agreement. CareerSource Research Coast will determine the level of sanctions to be imposed.
- 6. METHOD AND TIME OF PAYMENT:** The One-Stop Operator will be issued a check for the total allowable fee incurred upon receipt of proper, verified invoices and a monthly report of hours spent and responsibilities performed.

The last invoice must be submitted no later than July 5th, 2018.

- 7. DEOBLIGATION:** The One-stop Operator is expected to fulfill the responsibilities and meet the goals contained in the Statement of Work section of this Agreement. CareerSource Research Coast will monitor these items and will terminate this Agreement if the One-Stop Operator fails to provide the requested services and performance.

ATTACHMENT E – NEGOTIATED BUDGET FOR 2017-2018 ONE-STOP OPERATOR

| Line Item | Payable | Total |
|---|---------|--------------------|
| One-Stop Operator Fees for Services July 1, 2017 through June 30, 2018 | | \$35,000.00 |
| The fully-loaded hourly labor rate (to include all expenses) is \$33.653 | | |
| Total estimated hours spent to complete the responsibilities and goals of this project is 1040 1040 x \$33.653 | | |
| TOTAL COSTS These costs and the estimated hours worked on this project have been determined reasonable by CareerSource Research Coast. | | \$35,000.00 |

ATTACHMENT F – DESIGNATION OF CONTRACT PERSONNEL

CareerSource Research Coast has authorized the following personnel to administer this contract and give direction to the Service Provider:

Name: Glenda Harden

Title: Chief Operations Officer/ Senior Vice President of Operations

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

Telephone Number: (866) 482-4473 x. 427

Designated by: Brian Bauer

Title: President/CEO

Date: July 1, 2017

The One-Stop Operator has authorized the following personnel as the official contact person to accept direction from the above named personnel and to respond on our behalf:

Name: Kathie Schmidt

Title: Owner, Career and Technical Consultants, LLC.

Address: 139 NE Pinelake Village Blvd., Jensen Beach, FL 34957

Telephone Number: (772) 528-0021

Date: July 1, 2017

ATTACHMENT G – SIGNATORY AUTHORITY FOR INVOICES

The following individual has/have been delegated signatory authority for invoices submitted under this Agreement. Original signatures are required on this document and the invoice.

A. 

Signature

Kathie Schmidt, Owner, Career and Technical Consultants, LLC.
Printed Name & Title

ATTACHMENT H – CERTIFICATIONS & ASSURANCES

In performing its responsibilities under this agreement, the One-Stop Operator hereby certifies and assures that it will fully comply with the following GENERAL PROVISIONS, CERTIFICATIONS AND ASSURANCES contained in this section:

By signing the agreement, the One-Stop Operator is providing the assurances and certifications as detailed below:

1. COMPLIANCE WITH POLICIES AND LAWS

The warranty of this Section specifically includes compliance by the Contractor and its subcontractors with the provisions of the Immigration Reform and Compliance Act of 1986 (P. L. 99-603), the Workforce Innovation and Opportunity Act (WIOA), the provisions of the Workforce Investment Act of 1998, the Workforce Innovation Act of 2000, 45 CFR 98, the Temporary Assistance for Needy Families Program (TANF), 45 CFR parts 260-265, and other applicable federal regulations and policies promulgated thereunder and other applicable State, Federal, criminal and civil law with respect to the alteration or falsification of records created in connection with this Agreement. Office of Management and Budget (OMB) Circulars: Contractor agrees that, if applicable, it shall comply with all applicable OMB circulars, such as 2 CFR 200. Contractor will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. 276a to 276a7), the Copeland Act (40 U.S.C. 276c and 18 U.S.C. 874, and the Contract Work Hours and Safety Standards Act (40.327-333), regarding labor standards for federally assisted construction subagreements.

2. CERTIFICATION REGARDING CLEAN AIR ACT, WATER ACT, ENERGY EFFICIENCY AND ENVIRONMENTAL STANDARDS, SOLID WASTE

Clean Air and Water Act: When applicable, if this Contract is in excess of \$100,000, the Contractor shall comply with all applicable standards, orders or regulations issued under the Clean Air Act as amended (42 U.S.C. 7401), Section 508 of the Clean Water Act as amended (33 U.S.C. 1368 et seq.), Executive Order 11738 and Environmental Protection Agency regulations (40 CFR Part 15). The Contractor shall report any violation of the above to the contract manager. Energy Efficiency: The Contractor shall comply with mandatory standards and policies relating to energy efficiency which are contained in the State of Florida's Energy Conservation Plan issued in compliance with the Energy Policy and Conservation Act (Public Law 94-163).

Contractor will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in flood plains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. 1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. 7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended, (P.L. 93-523); and (h) protection of endangered species under the Endangered Species Act of 1973, as amended, (P.L. 93-205). The Vendor will comply with the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act (42 U.S.C. 6962).

3. CONFIDENTIALITY

It is understood that the Contractor shall maintain the confidentiality of any information, regarding Client customers and the immediate family of any applicant or customer, that identifies or may be used to identify them and which may be obtained through application forms, interviews, tests, reports from public agencies or counselors, or any other source. Contractor shall not divulge such information without the written permission of the customer, except that such information which is necessary as determined by Client for purposes related to the performance or evaluation of the Agreement may be divulged to Client or such other parties as they may designate having responsibilities under the Agreement for monitoring or evaluating the services and performances under the Agreement, or to governmental authorities to the extent necessary for the proper administration of the law. All release of information shall be in accordance with applicable State laws, and policies of the Client. No release of information by Contractor, if such release is required by Federal or State law, shall be construed as a breach of this Section.

4. RIGHTS TO DATA/COPYRIGHTS AND PATENTS

CareerSource Research Coast, State of Florida and the U.S. Department of Labor shall have unlimited rights to inventions made under contract or agreement: Contracts or agreements for the performance of experimental, developmental, or research work shall provide for the rights of the Federal Government and the recipient in any resulting invention in accordance with 37 CFR part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements" and any implementing regulations issued by the awarding agency.

5. MONITORING

At any time and as often as Client, the State of Florida, United States Department of Labor, Comptroller General of the United States, the Inspector Generals of the United States and the State of Florida, or their designated agency or representative may deem necessary, Contractor shall make available all appropriate personnel for interviews and all financial, applicant, or participant books, documents, papers and records or other data relating to matters covered by this contract, for examination and/or audit, and/or for the making of excerpts or copies of such records for the purpose of auditing and monitoring activities and determining compliance with all applicable rules and regulations, and the provisions of this Agreement. The above referenced records shall be made available at the Contractor's expense, at reasonable locations as determined by Client. Contractor shall respond in writing to monitoring reports and requests for corrective action plans within 10 working days after the receipt of such request from Client.

6. PUBLIC ANNOUNCEMENTS AND ADVERTISING

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

THE PRO-CHILDREN ACT

Contractor agrees to comply with the Pro-Children Act of 1994, 20 U.S.C. 6083. Failure to comply with the provisions of the law may result in the imposition of civil monetary penalty up to \$1,000 for each violation and/or the imposition of an administrative compliance order on the responsible entity. This clause is applicable to all approved sub-contracts. In compliance with Public Law (Pub. L.) LO3-277, the Contract shall not permit smoking in any portion of any indoor facility used for the provision of federally funded services including health, day care, early childhood development, education or library services on a routine or regular basis, to children up to age 18.

8. TERMINATION FOR DEFAULT/CONVENIENCE

This modified agreement may be terminated as follows:

- a. Either party may request termination of modified agreement upon 30 days prior written notice to the other party.
- b. CareerSource Research Coast may unilaterally terminate or modify this modified agreement, if for any reason either the U.S. Department of Labor or the State of Florida reduces funding through the grants under which this modified agreement is funded.
- c. CareerSource Research Coast may unilaterally terminate this modified agreement at any time that it is determined that:
 - i. Contractor fails to provide any of the services it has contracted to provide; or
 - ii. Contractor fails to comply with the provisions of this modified agreement; or
 - iii. Such termination is in the best interest of the CareerSource Research Coast.
- d. Written notification of termination must be by registered mail, return receipt requested.

If Contractor disagrees with the reasons for termination, they may file a grievance in writing within ten days of notice of termination to CareerSource Research Coast, who will conduct a grievance hearing and decide, from evidence presented by both parties, the validity of termination.

In the event this modified agreement is terminated for cause, Vendor shall be liable to CareerSource Research Coast for damages sustained for any breach of this modified agreement by the Contractor, including court costs and attorney fees, when cause is attributable to the Contractor.

In instances where Vendors/Contractors violate or breach modified agreement terms, CareerSource Research Coast will use all administrative, contractual or legal remedies that are allowed by law to provide for such sanctions and penalties as may be appropriate.

9. HATCH ACT

The Contractor will comply with the provisions of the HATCH ACT, 5 U.S.C. 1501-1508 and 7328 which limit the political activities of employees whose principal employment activities are funded in whole or part with Federal funds.

10. CONFLICT OF INTEREST/STANDARDS OF CONDUCT

The Contractor agrees that in administering the contract to comply with standards of conduct that maintain the integrity of the contract in an impartial manner, free from personal, financial or political gain by avoiding situations which suggest that any decision was influenced by prejudice, bias or special interest.

11. ETA SALARY LIMITATION

Contractor certifies that is in compliance with Public Law 109-234, and that none of the funds appropriated in Public Law 109-149 or prior Acts under the heading "Employment and Training" that are available for expenditures on or after May 1, 2012, shall be used by a recipient or subrecipient of such funds to pay the salary and bonuses of an individual, either as direct costs or indirect costs, at a rate in excess of Executive Level II, except as provided for under Section 101 of Public Law 109-149. This limitation shall not apply to vendors providing goods and services as defined in 2 CFR200.

12. TRAFFICKING VICTIMS PROTECTION ACT

The Contractor will comply with the Trafficking Victims Protection Act of 200 (2 CFR 175).

3. VETERAN'S PRIORITY OF SERVICE

Contractor agrees to comply with the Veteran's Priority of Service Provisions (38 U.S.C. 4215 and 20 CFR 1010).

14. EQUAL TREATMENT FOR FAITH-BASED ORGANIZATIONS

Contractor will comply with 29 CFR 2, Subpart D which prohibits any State or local government receiving funds under any Department of Labor program, or any intermediate organization with the same duties as a governmental entity, from discriminating for or against an organization on the basis of the organization's religious character or affiliation. Prohibits religious organizations from engaging in inherently religious activities, such as worship, religious instruction, or proselytization, as part of the programs or services funded with direct financial assistance. Prohibits an organization that participates in programs funded by direct financial assistance from the Department of Labor, in providing services, from discriminating against a program beneficiary or prospective program beneficiary on the basis of religion or religious belief. Any restrictions on the use of grant funds shall apply equally to religious and non-religious organizations.

15. PURCHASE OF AMERICAN-MADE EQUIPMENT AND PRODUCTS

Contractor assures that, to the greatest extent practicable, all equipment and products purchased with funds made available in this Act will be American-made (P.L. 103-333 §507).

16. CODE OF CONDUCT

The contractor shall maintain written standards of conduct governing the performance of its employees engaged in the award and administration of contracts in accordance with 29 CFR 95.42, or abide by CareerSource Research Coast's code of conduct.

17. AUDITS AND MONITORING

Audit Requirements. A non-federal entity that expends \$750,000 or more during the non-Federal entity's fiscal year in Federal awards must have a single or program-specific audit conducted for that year in accordance with UG § 200.514, Scope of Audit, except when it elects to have a program-specific audit in accordance with § 200.507, Program-specific audits.

- Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.
- The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.
- The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989; however, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. Attached is a copy of the final order.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED, OR THROUGH THE END OF THE CONTRACT FOR WHICH IT IS BEING SIGNED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

Signature: *Kathie Schmidt*
Date: 6/27/17

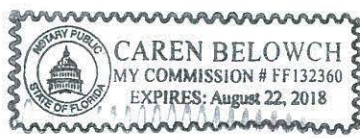
NOTARY PUBLIC

STATE OF Florida COUNTY OF St Lucie

PERSONALLY APPEARED BEFORE ME, the undersigned authority, *Kathie Schmidt*,
(name of individual signing)

who, after first being sworn by me, affixed his/her signature in the space provided above on

this 27 day of June, 2017



My commission expires: 8/22/18

ATTACHMENT J - CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS

1. The Contractor certifies to the best of its knowledge and belief, that it and its principal:
 - A. Are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any federal department or agency.
 - B. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction, violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statement, or receiving stolen property;
 - C. Are not presently indicated for or otherwise criminally or civilly charged by a government entity (federal, state, or local) with commission of any of the offenses enumerated in paragraph (1)(B) of this certification; and
 - D. Have not within a three-year period preceding this application/proposal/contract had one or more public transactions (federal, state, or local) terminated for cause or default.

2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall submit an explanation to CareerSource Research Coast.

CAREER AND TECHNICAL CONSULTANTS, LLC.

Contractor

KATHIE SCHMIDT, OWNER

Name and Title of Certifying Representative



Signature of Certifying Representative

6/27/17

Date

ATTACHMENT K - BYRD ANTI-LOBBYING CERTIFICATE

Certification for Contracts, Grants, Loans, and Cooperative Agreements (to be submitted with each bid or offer exceeding \$100,000)

APPLICABLE TO THIS CONTRACT: Yes: No:

The undersigned Contractor certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for making lobbying contacts to an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form--LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions as amended by "Government wide Guidance for New Restrictions on Lobbying," 61 Fed. Reg. 1413 (1/19/96).

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by 31, U.S.C. § 1352 (as amended by the Lobbying Disclosure Act of 1995). Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Pursuant to 31 U.S.C. § 1352(c)(1)-(2)(A), any person who makes a prohibited expenditure or fails to file or amend a required certification or disclosure form shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such expenditure or failure.

The Contractor, CAREER AND TECHNICAL CONSULTANTS, L.L.C., certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Contractor understands and agrees that the provisions of 31 U.S.C. A 3801, *et seq.*, apply to this certification and disclosure.

CAREER AND TECHNICAL CONSULTANTS, L.L.C.

Contractor

KATHIE SCHMIDT OWNER

Name and Title of Certifying Representative

Kathie Schmidt

Signature of Certifying Representative

6/27/17

Date

ATTACHMENT L - NONDISCRIMINATION AND EQUAL OPPORTUNITY PROVISIONS ASSURANCE STATEMENT

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

- Section 188 of the Workforce Innovation & Opportunity Act (WIOA), Which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title I- Financially assisted program or activity;
- Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color, and national origin;
- Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities;
- The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age;
- Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs;
- Section 654 of the Omnibus Budget Reconciliation Act of 1981 prohibiting discrimination on the basis of race, creed, color, national origin, sex, handicap, political affiliation or beliefs;
- The American with Disabilities Act of 1990, P.L. 101-336 prohibiting discrimination in all employment practices, including the job application procedures, hiring, firing, advancement, compensation, training, and other terms, conditions, and privileges of employment. It applies to recruitment, advertising, tenure, layoff, leave, fringe benefits, and all other employment-related activities; and

The Contractor also assures that it will comply with 29 CFR Part 37 and all other regulation implementing the laws listed above.

For construction contracts in excess of \$10,000, the Contractor will comply with Executive Order 11246 of September, 24, 1965, entitled "Equal Employment Opportunity" as amended by Executive Order 11375 of October 13, 1967, and supplemented on Department of Labor regulations at 41 CFR Chapter 60.

Failure to comply with these provisions may result in termination of any contract or agreement with CareerSource Research Coast.

I certify that I have read the above statement and on behalf of CAREER AND TECHNICAL CONSULTANTS, L.L.C.
Agree to comply fully with the provisions contained therein.

CAREER AND TECHNICAL CONSULTANTS, L.L.C.

Contractor

KATHIE SCHMIDT, OWNER

Name and Title of Certifying Representative

Kathie Schmidt

Signature of Certifying Representative

6/27/17

Date

ATTACHMENT M - DRUG-FREE WORKPLACE REQUIREMENT CERTIFICATION

Pursuant to the Drug-Free Workplace Act of 1988, and its implementing regulations codified at 29 CFR 98, Subpart F, I KATHIE SCHMIDT the undersigned, in representation of CAREER AND TECHNICAL CONSULTANTS, attest and certify that the grantee will provide a drug-free workplace by:

1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the grantee's workplace and specifying the actions that will be taken against employees for violation of such prohibition;
2. Establishing an ongoing drug-free awareness program to inform employees about:
 - (a) The dangers of drug abuse in the workplace;
 - (b) The grantee's policy of maintaining a drug-free workplace;
 - (c) Any available drug counseling, rehabilitation, and employee assistance programs; and
 - (d) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;
3. Making it a requirement that each employee engaged in the performance of the grant be given a copy of the statement required by paragraph (1);
4. Notifying the employee in the statement required by paragraph (1) that, as a condition of employment under the grant, the employee will:
 - (a) Abide by the terms of the statement; and
 - (b) Notifying the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction;
8. Notifying the agency in writing ten calendar days after receiving notice under subparagraph (4)(b) from an employee or otherwise receiving actual notice of such conviction. We will provide such notice of convicted employees, including position title, to every grant officer on whose grant activity the convicted employee was working. The notice shall include the identification number(s) of each affected grant.
9. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph 4(b), with respect to any employee who is so convicted:
 - (a) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973 as amended; or
 - (b) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local, health, law enforcement, or other appropriate agency;
7. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs (1), (2), (3), (4), (5), and (6).
8. Notwithstanding, it is not required to provide the workplace address under the grant. As of today, the specific sites are known and we have decided to provide the specific addresses with the understanding that if any of the identified places change during the performance of the grant, we will inform the agency of the changes. The following are the sites for the performance of work done in connection with the specific grant including street address, city, county, state, and zip code:

Check () if there are workplaces on file that are not identified here.
Check () if an additional page was required for the listing of the workplaces.

I declare, under penalty of perjury under the laws of the United States, and under the penalties set forth by the Drug-Free Workplace Act of 1988, that this certification is true and correct.

I certify that I who sign this Drug-Free Workplace Certification on behalf of the Contractor, do so by the authority given by the Governor of the State of Florida, that such signing is within the scope of my powers.

CAREER AND TECHNICAL CONSULTANTS, L.L.C.

Contractor

KATHIE SCHMIDT, OWNER

Name and Title of Certifying Representative

Kathie Schmidt

Signature of Certifying Representative

6/27/17

Date



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

- I. **BACKGROUND:** The creation of the One-Stop Center was a cornerstone of the Workforce Investment Act of 1998 (WIA). The vision for the One-Stop Center system reflects the long-standing efforts of dedicated workforce professionals to align a wide range of publicly or privately funded education, employment, and training programs, while also providing high quality customer service to all job seekers, workers, and employers. Since then, the Workforce Innovation and Opportunity Act of 2014 (WIOA) builds on the significance and benefits of the *Comprehensive One-Stop Career Center* network, related best practices, and incorporates important tools and technological advances that have opened up new methods of service delivery in the workforce development system. Under WIOA, the new *Comprehensive One-Stop Career Center System* includes a network of required partners whose staff strive to:
1. Provide job seekers with the skills and credentials necessary to secure and advance in employment with wages that sustain themselves and their families.
 2. Provide access and opportunities to job seekers, including individuals with barriers to employment, such as individuals with disabilities, English language learners, and those who have low levels of literacy, to prepare for, obtain, retain, and advance in high-quality jobs and high-demand careers.
 3. Enable businesses and employers to easily identify and hire skilled workers and access other human resource assistance, including education and training for their current workforce, which may include assistance with pre-screening applicants, writing job descriptions, offering rooms for interviewing, consultation services, and more.
 4. Participate in rigorous evaluations that support continuous improvement of the *Comprehensive One-Stop Career Center* by identifying which strategies work better for different populations.
 5. Ensure that high-quality integrated data inform decisions made by policy makers, employers and partners.



MEMORANDUM OF UNDERSTANDING
COMPREHENSIVE ONE-STOP CAREER CENTER for
LOCAL WORKFORCE DEVELOPMENT AREA 20 BETWEEN
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AND REQUIRED PARTNERS

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

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



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

III. Required Partners to this Memorandum of Understanding:

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



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

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



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

IV. Goals:

1. Eliminate the unwarranted duplication of services, reduce administrative costs, and enhance the participation and performance of customers served through the *Comprehensive One-Stop Career Center*.
2. Establish guidelines for creating and maintaining a cooperative working relationship to facilitate joint planning and evaluation of services, and to develop more efficient management of limited financial and human resources.
3. Build a workforce development system that upgrades Florida's workforce skills and enhances the economic development of the region.

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

1. Provide services in the LWDA 20 *Comprehensive One-Stop Career Center*, as appropriate and needed by the community served. Each agency will be responsible for providing those services in which they specialize or for which they receive funding and to the extent determined by the program's authorizing statute.
2. Participate in the *Comprehensive One-Stop Career Center* and actively contribute to the quality of the local workforce development system.
3. Participate in the development of the *Comprehensive One-Stop Career Center* "Infrastructure Funding Agreement" (IFA) that describes how operating costs of the system will be funded, and abide by those plans.
4. Comply with *Comprehensive One-Stop Career Center* policies and procedures regarding customer confidentiality, data security, and referrals between partners.
5. Participate in and provide training and cross-training, as deemed appropriate, to ensure that the *Comprehensive One-Stop Career Center* staff are familiar with all programs contained in the *Comprehensive One-Stop Career Center* in order to integrate services, reduce duplication, and improve overall service delivery.
6. Participate in the utilization of an integrated case management, client tracking system, and referral procedures between parties as appropriate.



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

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



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

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

VI. ASSURANCES:

1. The Partners to this MOU shall not exclude from participation, discriminate against, or deny employment services or benefits to any person, including trainees, in the administration of, or in connection with any programs administered by the Partners on the grounds of race, color, sex, religion, mental or physical disability, age, political affiliation, belief, national origin, marital status, application for Workers' Compensation benefits, juvenile justice record, sexual orientation or perceived sexual orientation, or association with any person with, or perceived to have one or more of the above named characteristics. Each *Comprehensive One-Stop Career Center* customer shall have recourse through the appropriate complaint procedure.
2. Each Partner to this MOU assures that it will follow the Americans with Disabilities Act (ADA) when operating in the *Comprehensive One-Stop Career Center*.
3. The Partners to this MOU will assure that it will follow its affirmative action plan to assure nondiscrimination, written personal policies, and grievance procedures for complaints and grievances from applicants, subcontractors, employers, employees, and other interested persons, all in accordance with applicable statutes and regulations.
4. It is expressly understood and agreed by all Partners to this MOU that employees receiving compensation for work performed under this agreement shall in no way be deemed employees of CSRC.
5. No funds utilized in conducting activities under this MOU shall be used to promote religious or non-religious activities, or used for lobbying activities, or political activities.
6. Each Partner to this agreement assures that it is an equal opportunity employer and is aware of and shall comply with Equal Employment Opportunity Commission practices or mandated by state and federal statutes and regulations.
7. Each Partner to this agreement assures that it will follow a Drug-Free Workplace policy that is in compliance with the Drug-Free Workplace Act of 1988.
8. Each Partner to this agreement ensures that the needs of individuals, to include those with barriers to employment and those with disabilities, are addressed by providing access to services, including access to technology and materials that are available through the *Comprehensive One- Stop Career Center*.



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

- VII. METHODS OF REFERRAL:** Partners to this MOU will work together to develop referral procedures that assure quality and convenient services for customers.
- VIII. TERM OF MEMORANDUM OF UNDERSTANDING AS REQUIRED BY WIOA LEGISLATION:** This MOU / IFA commences on January 1, 2018 and expires June 30, 2020 unless terminated earlier upon thirty (30) days written notice to all Partners via certified U.S. Mail. This MOU must be reviewed and renewed not less than once every three (3) years.
- IX. DISPUTE RESOLUTION:** Partners to the *Comprehensive One-Stop Career Center* will function by consensus. When consensus cannot be reached and the functioning of the LWDA 20 *Comprehensive One-Stop Career Center* is impaired, those who are parties to the dispute will adhere to the following dispute resolution procedure:
1. All parties to the dispute will meet with the *Comprehensive One-Stop Career Center* Manager and/or the Director of Operations.
 2. If the *Comprehensive One-Stop Career Center* Operations Manager or Director of Operations is unable to resolve the dispute to the satisfaction of members who are parties to the dispute, the complaint shall be referred to the One-Stop Operator.
 3. If the One-Stop Operator is unable to resolve the dispute, the complaint shall be submitted in writing to the Senior Vice President of Operations of CSRC within 15 working days of the initial dispute.
 4. The Senior Vice President of Operations will evaluate the merit of the dispute, consult with the *Comprehensive One-Stop Career Center* Operations Manager, the Director of Operations, the One-Stop Operator and the aggrieved party or parties, and may attempt to resolve the dispute through mediation.
 5. If any party to the dispute is not satisfied with the decision of CSRC Administration, the dispute will be referred to the CSRC Executive Committee of the Board of Directors for final action. This entity will make a decision within thirty (30) working days of the dispute.
- X. AMENDMENTS AND MODIFICATIONS:** This MOU may be amended or modified with review and consent of all Partners. Amendments and modifications must be issued in writing to all Partners. All Partners must be given a minimum of 30 days to comment prior to the inclusion of any amendment or modification. Oral amendments or modifications shall have no effect. If any provision of this MOU is held to be invalid, the remainder of the



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

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

- XI. GOVERNANCE:** The management of the *Comprehensive One-Stop Career Center* is the responsibility of CSRC pursuant to WIOA. CSRC, in partnership with the Consortium, shall conduct oversight with respect to the *Comprehensive One-Stop Career Center*. CSRC will promote and support the total integration of workforce development services of all *Comprehensive One-Stop Career Center* Partners, promote customer choice and satisfaction for internal and external customers of the *Comprehensive One-Stop Career Center*, remove external barriers which impede progress and performance, approve annual and long-range performance standards and goals for the *Comprehensive One-Stop Career Center*, develop an IFA for the *Comprehensive One-Stop Career Center*, establish an evaluation system for measuring customer satisfaction and performance and communicate with the community regarding the *Comprehensive One-Stop Career Center*. Through the *Comprehensive One-Stop Career Center*, the “One-Stop Operator”:
1. Facilitates integrated partnerships that seamlessly incorporate services for the common customers served by program partners of the *Comprehensive One-Stop Career Center*.
 2. Develops and implements operational policies that reflect an integrated system of performance, communication, and case management, and uses technology to achieve integration and expanded service offerings.
 3. Organizes and integrates the *Comprehensive One-Stop Career Center* by function when permitted by a program’s authorizing statute and, as appropriate, through coordinating staff communication, capacity building, and training efforts.
 4. Provides superior service to partners and businesses in an integrated, regionally focused framework of service delivery, consistent with the requirements of each of the partner programs.
 5. Ensures that *Comprehensive One-Stop Career Center* and Partner staff are cross-trained, as appropriate, to increase staff capacity, expertise, and efficiency. This allows staff from differing programs to understand other partner programs’ services, and share their own expertise related to the needs of specific populations so that all staff can better serve all customers.

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

I. CAREER SOURCE RESEARCH COAST

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

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

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

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

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

I. CAREER SOURCE RESEARCH COAST

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II. WORKFORCE INNOVATION AND OPPORTUNITY ACT / DISLOCATED WORKER

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

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

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

I. CAREER SOURCE RESEARCH COAST

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

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

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

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

I. CAREER SOURCE RESEARCH COAST

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

II. MIGRANT SEASONAL FARMWORKER (MSFW)

Services Provided to Migrant and Seasonal Farmworkers:

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

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

I. CAREER SOURCE RESEARCH COAST

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

II. WAGNER – PEYSER ACT

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

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

PRIORITY RE-EMPLOYMENT PLANNING (PREP)

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

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

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

I. CAREER SOURCE RESEARCH COAST

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

II. JOBS FOR VETERANS PROGRAM

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

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

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

I. CAREER SOURCE RESEARCH COAST

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

II. TRADE ADJUSTMENT ASSISTANCE (TAA)

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

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

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

I. CAREER SOURCE RESEARCH COAST

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

II. WELFARE TRANSITION PROGRAM

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

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

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

I. CAREER SOURCE RESEARCH COAST

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

II. SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM (SNAP)

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

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

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

I. AARP FOUNDATION SENIOR COMMUNITY SERVICE EMPLOYMENT PROGRAM

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

II. RESPONSIBILITIES AND RESOURCES:

AARP Foundation SCSEP agrees to the following responsibilities and resources:

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

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

Career Source Research Coast agrees to provide the following resources:

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

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

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

I. THE FLORIDA DIVISION OF BLIND SERVICES

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

VOCATIONAL REHABILITATION PROGRAM:

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

II. RESPONSIBILITIES AND RESOURCES:

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

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

I. THE FLORIDA DIVISION OF VOCATIONAL REHABILITATION

The Florida Division of Vocational Rehabilitation (VR) is a federal-state program that helps people who have physical or mental disabilities get or keep a job. VR is committed to helping people with disabilities find meaningful careers.

Our Mission is "to help people with disabilities find and maintain employment and enhance their independence." Our Vision is "to become the first place people with disabilities turn when seeking employment and a top resource for employers in need of qualified employees."

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

II. PROGRAMS AND SERVICES OFFERED:

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

III. ADDITIONAL TRANSITION SERVICES:

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

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

I. ST. LUCIE COUNTY COMMUNITY SERVICES

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

II. ST. LUCIE COUNTY COMMUNITY SERVICES WILL PROVIDE:

- Career Source Research Coast (CSRC) clients visiting the "Comprehensive One-Stop Career Center" will have computer access via "Skype", eight (8) hours per month, to the St. Lucie County Community Services Department.
- Clients will have the ability to apply online for services including but not limited to: employment support services, identification cards, driver's license, transportation, and GED testing fees to 10 clients @ approximately \$100 per client for eligible applicants when funding is available not to exceed \$1,000.

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

- Staff will familiarize themselves with the basic eligibility and participation requirements, as well as with the available services and benefits offered, for each of the Partner's programs.
- Community Services staff will provide bi-annual training to CSRC staff on programs and eligibility requirements pertaining to the "Community Services Block Grant".
- A liaison or contact between the agencies will be designated for the purpose of technical or program assistance.
- Develop materials summarizing program requirements and make them available for Partners and customers.

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

I. ADULT EDUCATION - FAMILY LITERACY / IRSC

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

II. IRSC / ADULT EDUCATION WILL PROVIDE THE FOLLOWING:

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

III. PARTICIPATION IN THE COMPREHENSIVE ONE-STOP CAREER CENTER

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

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

I. POST-SECONDARY CAREER AND TECHNICAL EDUCATION / IRSC

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

II. CAREER AND TECHNICAL EDUCATION WILL PROVIDE THE FOLLOWING:

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

III. PARTICIPATION IN THE COMPREHENSIVE ONE-STOP CAREER CENTER

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

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

I. *YOUTHBUILD* PROGRAM

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

II. *YOUTHBUILD* WILL PROVIDE THE FOLLOWING:

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

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


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

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

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

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

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

- The MOU
 The Infrastructure Funding Agreement (IFA)

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

- The MOU
 The Infrastructure Funding Agreement (IFA)

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

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

Signature:  Date: 12/15/2017

Printed Name and Title: Brian Bauer, President/CEO

Agency Name: CareerSource Research Coast

Agency Contact Information: Jenn DuBey



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

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

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

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

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

- The MOU
 The Infrastructure Funding Agreement (IFA)

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

- The MOU
 The Infrastructure Funding Agreement (IFA)

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

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

Signature:  Date: 12/15/17

Printed Name and Title: Robert Cenk, Board Chair

Agency Name: CareerSource Research Coast

Agency Contact Information: Brian Bauer



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

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

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

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

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

- The MOU
 The Infrastructure Funding Agreement (IFA)

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

- The MOU
 The Infrastructure Funding Agreement (IFA)

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

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

Signature:  Date: 12/19/17

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

Agency Name: Treasure Coast Workforce Consortium

Agency Contact Information: 772-462-1451



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

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

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

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

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

- The MOU
 The Infrastructure Funding Agreement (IFA)

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

- The MOU
 The Infrastructure Funding Agreement (IFA)

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

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

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

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

Agency Name: AARP FOUNDATION SCSEP

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

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

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

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

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

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

- The MOU
- The Infrastructure Funding Agreement (IFA)

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

- The MOU
- The Infrastructure Funding Agreement (IFA)

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

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

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

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

Agency Name: St. Lucie County

Agency Contact Information: 772-462-1453

APPROVED AS TO FORM
AND CORRECTNESS

James J. [Signature]
COUNTY ATTORNEY



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

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

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

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

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

- The MOU
 The Infrastructure Funding Agreement (IFA)

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

- The MOU
 The Infrastructure Funding Agreement (IFA)

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

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

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

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

Agency Name: Indian River State College

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