



# CareerSource

# Citrus Levy Marion

## Local Workforce Development Area 10

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Date Submitted: March 13, 2020  
Plan Contact: Dale French

## CONTENTS

<b>INTRODUCTION</b>	<b>1</b>
<b>KEY DATES</b>	<b>2</b>
<b>PUBLIC COMMENT PROCESS</b>	<b>2</b>
<b>PLAN SUBMISSION TO CAREERSOURCE FLORIDA</b>	<b>4</b>
<b>FLORIDA'S VISION FOR IMPLEMENTING THE WORKFORCE INNOVATION AND OPPORTUNITY ACT</b>	<b>6</b>
<b>ORGANIZATIONAL STRUCTURE</b>	<b>6</b>
<b>ANALYSIS OF NEED AND AVAILABLE RESOURCES</b>	<b>13</b>
<b>WORKFORCE DEVELOPMENT AREA VISION AND STRATEGIC GOALS</b>	<b>23</b>
<b>COORDINATION OF SERVICES</b>	<b>42</b>
<b>DESCRIPTION OF THE LOCAL ONE-STOP SYSTEM</b>	<b>52</b>
<b>DESCRIPTION OF PROGRAM SERVICES</b>	<b>64</b>

## INTRODUCTION

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

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

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

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

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

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

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

## KEY DATES

## ON OR BEFORE

<b>Key Dates Sent to Local Boards.....</b>	<b>October 11, 2019</b>
<b>Local Plan Guidelines Issued .....</b>	<b>November 1, 2019</b>
<b>Labor Market Analysis Sent to Local Boards.....</b>	<b>December 6, 2019</b>
<b>Local Plans Due .....</b>	<b>March 16, 2020</b>
<b>WIOA Statewide Unified Plan Due .....</b>	<b>March 30, 2020</b>
<b>WIOA Statewide Unified Plan Approved .....</b>	<b>May 1, 2020</b>
<b>Local Plans Approved .....</b>	<b>June 4, 2020</b>
<b>WIOA Program Year 2020 Begins.....</b>	<b>July 1, 2020</b>

## PUBLIC COMMENT PROCESS

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

- (1) Make copies of the proposed local plan available to the public through electronic and other means, such as public hearings and local news media (WIOA §108(d)(1)).
- (2) Provide a 30-day period for comment on the plan before its submission to CareerSource Florida, Inc., beginning on the date on which the proposed plan is made available, prior to its submission to the Governor (WIOA §108(d)(2)).
- (3) Provide a description of the process used by the board to obtain input and comment by representatives of businesses and labor organizations for the development of the plan (WIOA §108(d)(2)).
  - Public Comment Period Advertised – February 4, 5 and 6, 2020 All news outlets & CSCLM Website
  - First Draft Plan Available for Public Comment – February 13, 2020
  - Public Comment Period – February 13, 2020 – March 13, 2020
  - Citrus Presentation & Listening Session – February 24, 2020 at 2pm – CareerSource Citrus Center
  - Levy Presentation & Listening Session – February 25, 2020 at 2pm – CareerSource Levy Center
  - Marion Presentation & Listening Session – February 26, 2020 at 20m – CareerSource Marion Center
  - Draft Plan Presented to Consortium – February 28, 2020 – CSCLM
  - Draft Plan Presented to Full Board – March 11, 2020 – College of Central Florida
  - Local Plan Due to State – March 16, 2020
  - Local Plan Approved by State – June 4, 2020

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

This will be done during the public comment period Presentation & Listening sessions described in section 3 above. Local partners will be notified of the sessions and will be invited to attend the session appropriate for their county.

- (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)).

None received.

## PLAN SUBMISSION TO CAREERSOURCE FLORIDA

### ONLINE FORM

CareerSource Florida, Inc., established an online form for WIOA local plan submissions, required attachments and contact information for primary and secondary points of contact for each local workforce development board. **Please note the local plan and all attachments must be submitted in a searchable PDF format.**<sup>1</sup>

The web address for submitting local plans, required attachments and links to requested documents is <https://careersourceflorida.com/wioa-form/>

**It is recommended that those submitting local plans carefully review these instructions and those posted online prior to submitting plans.**

**All local plans must be submitted no later than 5:00 p.m. (EST) on Monday, March 16, 2020.**

**Prior to plan submission, please ensure:**

- **The local board reviewed the plan;**
- **The board chair and the chief elected official signed the appropriate documents;**
- **The name and number of the local board and are on the plan cover page;**
- **The plan submitted or point of contact is on the cover page;**
- **The structure and numbering follows the plan instructions format;**
- **A table of contents with page numbers is included and each page of the plan is numbered;**
- **Text is typed, preferably in the fonts Arial or Calibri, with a font size of 11 or greater;**
- **Responses to all questions are informative and concise; and,**

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<sup>1</sup> A searchable PDF file is a PDF file that includes text that can be searched upon using the standard Adobe Reader “search” functionality [CTRL+F]. In Microsoft Word Click **File > Save As** and choose where you want the file to be saved. In the **Save As** dialog box, choose **PDF** in the Save as type list. Click **Options**, make sure the **Document structure tags for accessibility** check box is selected, and then click **OK**.

- The name of the local area, the page number and plan submission date are listed in the footer of the document.

## **ATTACHMENTS**

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

- A. Executed Memoranda of Understanding for all one-stop partners** (Section III(b)(2) and Section IV(a)(1)(d) of the State of Florida WIOA Unified Plan);
- B. Executed Infrastructure Funding Agreements with all applicable WIOA required partners** (Section III(b)(2) and Section IV(a)(1)(d) of the State of Florida WIOA Unified Plan);
- C. Executed Interlocal Agreements (in cases where there is more than one unit of general local government);**
- D. Agreements describing how any single entity selected to operate in more than one of the following roles: local fiscal agent, local board staff, one-stop operator or direct provider of career services or training services entity will carry out its multiple responsibilities, including how it develops appropriate firewalls to guard against conflicts of interest. Also attach copies of any procedures on how roles are delineated to verify the firewalls are effective.**
- E. The current board member roster, meeting minutes for the local plan agenda item, discussions about the plan, and the board's vote on the local plan;**
- F. Any comments submitted during the public comment period that represent disagreement with the local plan** (Public Law 113-128, Section 108(d).
- G. If the local area includes more than one unit of general local government in accordance with WIOA sec. 107(c)(1)(B), attach the executed agreement that defines how parties carry out roles and responsibilities of the chief elected official;**
- H. A copy of the agreement executed between the chief elected official(s) and the Local Workforce Development Board;**
- I. A copy of the current by-laws established by the chief elected official to address criteria contained in §679.310(g) of the WIOA regulations;**

**NOTE: THERE IS NO REQUIREMENT TO SUBMIT HARD COPIES OF LOCAL PLANS OR ATTACHMENTS.**

If you have any questions, please contact CareerSource Florida at:  
[FloridaWIOA@careersourceflorida.com](mailto:FloridaWIOA@careersourceflorida.com)

Once plans are received, the plan's official review by CareerSource Florida and the Department of Economic Opportunity (DEO) begins. 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 CareerSource Florida staff with recommendations provided to the CareerSource Florida Board of Directors at its meeting scheduled for June 4, 2020.**

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 updated plan will include strategies and activities that are fully completed, as well as some that are still being developed and implemented.

**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.

**ORGANIZATIONAL STRUCTURE**

**(1) Chief Elected Official(s)**

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



Commissioner Jimmie T. Smith  
110 N. Apopka Avenue, Inverness, FL 34450  
Phone: 352-3114-6560  
Fax: 352-341-6584  
Toll Free: 352-489-2120 (Citrus Springs & Dunnellon)  
[Jimmie.Smith@CitrusBOCC.com](mailto:Jimmie.Smith@CitrusBOCC.com)

Commissioner Rock Meeks  
355 S. Court Street  
Bronson, FL 32621  
352-486-5218  
[District2@levycounty.org](mailto:District2@levycounty.org)

Commissioner Jeff Gold  
601 SE 25<sup>th</sup> Avenue  
Ocala, FL 34471  
352-438-2300  
[Jeff.gold@marioncountyfl.org](mailto:Jeff.gold@marioncountyfl.org)

- 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.

Interlocal Agreement

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

Memorandum of Agreement

- D. Attach a copy of the current by-laws established by the chief elected official to address criteria contained in §679.310(g) of the WIOA regulations. At a minimum the by-laws must include:
- i. The nomination process used by the chief elected official to elect the local board chair and local board members;
  - ii. The term limitations and how term appointments are staggered to ensure only a portion of memberships expire in each year;
  - iii. The process to notify the chief elected official of a board member vacancy ensuring a prompt nominee;
  - 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;
  - v. The use of technology, such as phone and web-based meetings used to promote board member participation;

- vi. The process to ensure board members actively participate in convening the workforce development system's stakeholders, brokering relationships with a diverse range of employers, and leveraging support for workforce development activities; and,
- vii. Any other conditions governing appointments or membership on the local board.

#### By-Laws

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

The Consortium has been informed of the meetings being held with community partners regarding the WIOA Plan. Citrus Presentation & Listening Session February 24, 2020 @ College of Central Florida, Levy Presentation & Listening Session February 25, 2020 @ College of Central Florida, Marion Presentation & Listening Session February 26, 2020 @ College of Central Florida. The Consortium has been provided draft of the Plan for review and has been presented to the Consortium, along with any public comments and the decision of the Board regarding those comments. The Consortium is invited to discuss the plan with staff and provide input. The first meeting was to outline the structural requirements for the board, the recommendations for membership structure and size and the recruitment of new members and proxies. The Board provides the Consortium with on-going information on the development of the plan, to include copies of Board agenda that discuss various aspects.

#### **(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.

Rachel M Riley  
Citrus Memorial Hospital  
502 W Highland Blvd.  
Inverness, FL 34452  
Phone: 352-344-6504  
[Rachel.Riley@HCAHealthcare.com](mailto:Rachel.Riley@HCAHealthcare.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.

Kimberly A. Baxley, MBA  
Vice President for Human Resources  
Central Florida Electric Cooperative, Inc.  
11491 NW 50<sup>th</sup> Avenue, Chiefland, FL 32626  
PO Box 9, Chiefland, FL 32644  
Phone: 352-493-2511 ext. 6981  
Cell: 352-221-3394  
[KBaxley@cfec.com](mailto:KBaxley@cfec.com)

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

In 2015, the board engaged Thomas P. Miller and Associates to assist it in developing its WIOA Strategic Plan. This Plan was adopted by the Board and Consortium in June 2015 and programming realignment was initiated for full implementation of WIOA by July 1, 2016. As part of the Strategic Plan, local workforce boards whose labor markets, commuter patterns and industry sectors aligned with CareerSource CLM were also identified.

As a direct provider of services in this workforce area the workforce board is active in the day to day management of services within the career centers and is therefore in tune with local economic conditions. It is the direct work of the frontline staff of the workforce development board that shapes the processes and service delivery methods as endorsed by the board of directors. It is also the input of frontline staff to the board that helps in the decision making processes.

Workforce board staff members are responsible for the writing and coordination with the chief elected officials, the board of directors, and the public through advertised information sessions to compile all strategies and input to create the comprehensive plan.

**(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 Consortium has selected the Citrus Levy Marion Regional Workforce Development Board, Inc., dba CareerSource Citrus Levy Marion.

- 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 Citrus Levy Marion Regional Workforce Development Board has elected to hire its own staff to serve as administrative entity, staff the One Stop centers and act as direct service provider within the local area.

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

CSCLM has been selected by the Consortium to serve as fiscal agent, administrative entity, and direct provider of services. The Board does not provide youth services or training services. Additionally, a One Stop Operator has been procured to carry out the mandatory duties of an operator as described in the WIOA.

The Consortium provides the overarching checks and balances for services and activities performed by CSCLM. They are provided in the following documents and information and key information is reviewed and approved at their meetings:

- Performance reports- state and federal reports
- Budgets
- Service reports- reports on services to their counties and residents, monthly, quarterly and annually. These are provided to all commissioners, not just consortium members.
- Audits and state monitoring reports, programmatic and fiscal
- In the selection of the Direct Service Provider, the Consortium approves the procurement approach and serves in an appeal capacity when it reviews and approves the Board's recommendation/request to serve as Direct Service Provider.
- At the Board level, its committees (performance, executive/audit, career centers, performance and monitoring, marketing and outreach) receive reports on performance and services that are provided to the Consortium. In addition, the Executive Committee reviews and recommends the initial and subsequent budget adjustments to the Board.

- At the Staff level, monitoring is a function within the Administrative Service staff and contracted third party monitors which report to the Performance and Monitoring and Career Center Committees and reported. These reports are shared with the Board and Consortium.
- The One Stop Operator (OSO) works with staff in carrying out their functions and reports to the Career Center committee and provides annual reports to the full board.
- Separation of duties between Finance, Operations, and Administration ensure a solid process of checks and balances within the system.

This structure provides a separation that allows the Board to oversee the direct provision of Career Services, fiscal and administrative services. The Board selects its auditors and independent monitors through a written and oral presentation process that ensures its integrity and separation from staff influence.

#### **(4) One-Stop System**

- A. Describe the local one-stop system (including the number, type and location of the comprehensive center(s)<sup>2</sup>, and other service delivery points).

CSCLM operates both fixed and mobile unit services throughout Citrus, Levy and Marion Counties. Its fixed office locations are in Lecanto (Citrus), Chiefland (Levy) and Ocala (Marion). Services in Marion County are provided through our comprehensive center as well as our Talent Center which is a partnership office between CSCLM and the College of Central Florida. The Talent Center acts as full service One Stop and the placement office for the college. Our mobile services include 4 person and 10 person mobile units. These are scheduled to provide services in areas which are not convenient to its fixed locations, provide on-site services at events such as on-site employer hiring, community events, partner events, REACT services, and can be deployed to neighboring workforce boards when additional assistance is required. Most recently our mobile units were dispatched to Panama City

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<sup>2</sup>A comprehensive center is one in which all core and required partner services are available either physically at the location or by direct linkage through technology to a program staff member who can provide meaningful information or services. See Training and Employment Guidance Letter No. 16-16 ([TEGL 16-16](#)) and Training and Employment Guidance Letter No. 16-16, Change 1 ([TEGL 16-16, Change 1](#)). **Additionally, Memorandums of Understanding (MOU) and Infrastructure Funding Agreements (IFA) must be executed for all partners connected to the comprehensive centers.**

after Hurricane Michael's widespread devastation in the Florida Panhandle in the fall of 2018.

The Ocala Career Center serves as the area's Comprehensive Career Center and is located at:

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

CSCLM's services are accessible 24/7 through its website that also provides live chat during normal business hours.

- 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.

Individual and Career Services are provided Monday through Friday, 8:00 a.m. to 5:00 p.m. in all of our locations. Except Mobile Units, which hours and days are posted online.

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

Thomas P. Miller & Associates has been procured to perform One Stop Operator functions.

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

Citrus Levy Marion Regional Workforce Development Board d/b/a CareerSource Citrus Levy Marion (CSCLM) provides direct services.

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

All career services are provided by the local board staff through a waiver with from the governor with Youth career services being provided through a procured provider – currently Eckerd Connects. Training services are provided through partnerships with local educational entities.

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

Signed Attestation

## 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

As part of WIOA Strategic Planning, our local board and partners have identified Manufacturing, Transportation/Distribution, Information Technology, Healthcare, and Hospitality (formally Accommodation and Food Services) as the demand sectors to focus on in our area. Construction was added to our targeted sector list in December of 2017, and Accommodation and Food Services (Hospitality) was added in December of 2019. Emerging sectors include Educational Services, with an estimated demand of 5,722 and an annual growth rate of 0.5% over the next 5 years, and Administrative/Support/Waste Management/Remediation Services, with an estimated demand of 5,438 and an annual growth rate of 0.7% over the next 5 years.

### In Demand and Emerging Industries

Workforce Development Area 10 – Citrus, Levy and Marion Counties							
NAICS	Industry	Current	5-Year Forecast				
		Empl	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
44	Retail Trade	24,652	16,369	7,257	9,170	-58	0.0%
62	Health Care and Social Assistance	26,951	15,108	6,447	6,664	1,997	1.4%
72	Accommodation and Food Services	15,808	13,900	5,788	7,290	823	1.0%
23	Construction	14,059	7,738	2,526	4,519	693	1.0%
61	Educational Services	11,554	5,722	2,599	2,805	318	0.5%
56	Administrative and Support and Waste Management and Remediation Services	8,744	5,438	2,166	2,955	317	0.7%
31	Manufacturing	10,361	5,293	1,981	3,392	-80	-0.2%
81	Other Services (except Public Administration)	7,660	4,501	2,001	2,389	111	0.3%
92	Public Administration	9,129	4,304	1,780	2,422	102	0.2%
48	Transportation and Warehousing	5,276	2,905	1,201	1,625	79	0.3%
71	Arts, Entertainment, and Recreation	3,798	2,845	1,213	1,498	135	0.7%
54	Professional, Scientific, and Technical Services	5,831	2,819	944	1,598	276	0.9%

11	Agriculture, Forestry, Fishing and Hunting	4,684	2,590	1,084	1,462	45	0.2%
42	Wholesale Trade	4,579	2,394	903	1,497	-7	0.0%
52	Finance and Insurance	3,488	1,720	621	1,020	79	0.4%
53	Real Estate and Rental and Leasing	2,744	1,482	639	765	78	0.6%
51	Information	1,461	636	249	442	-55	-0.8%
22	Utilities	1,399	605	226	399	-21	-0.3%
21	Mining, Quarrying, and Oil and Gas Extraction	225	121	38	78	5	0.5%
55	Management of Companies and Enterprises	238	116	40	69	7	0.6%
99	Unclassified	94	57	23	31	3	0.6%
	Total - All Industries	162,734	94,724	38,388	51,429	4,906	0.6%

Source: JobsEQ, Data as of 2019Q1

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

Our strong partnership with our area educational providers, the Mid-Florida Regional Manufacturers Association (MRMA), the Ocala Human Resource Management Association (ORHMA), Ocala/Marion County Chamber and Economic Development Partnership, Citrus County Chamber of Commerce and the Nature Coast Business Development Council has helped keep us in tune with the needs of local businesses across targeted sectors. As manufacturing and distribution centers continue to move to our area, the workforce required to maintain the demand of today’s manufacturing facilities must be multi-faceted in regard to core competencies and be adaptable to new processes and technology. We find our greatest need in this sector to be in the “middle-skilled” positions such as team assemblers, material handlers and inspectors. In the Healthcare sector we see a shortage in LPNs, RNs and Doctors. In Transportation/Distribution, our area has a need for CDL Truck Drivers, like many areas in the State and across the country. With a supply gap of 30%, this is our greatest supply shortage. In Hospitality there is a shortage across the board ranging from housekeepers to event planners.

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

According to the occupation profiles for those positions in highest demand in the Manufacturing sector knowledge and skills needed include:

KNO WLED GE	Attribute	Importance
	Production and Processing	72



	English Language	38
	Customer and Personal Service	31
	Mechanical	31
	Mathematics	29
<b>SKILLS</b>	Monitoring	50
	Critical Thinking	50
	Active Listening	50
	Speaking	50
	Reading and Comprehension	47

In the Healthcare sector, needed knowledge and skills include:

<b>KNOWLEDGE</b>	<b>Attribute</b>	<b>Importance</b>
		Medicine and Dentistry
	Psychology	83
	English Language	80
	Customer and Personal Service	79
	Education and Training	78
<b>SKILLS</b>	Active Listening	77
	Speaking	76
	Reading Comprehension	74
	Critical Thinking	74
	Monitoring	72

For the Transportation and Distribution sector, needed knowledge and skills include:

<b>KNOWLEDGE</b>	<b>Attribute</b>	<b>Importance</b>
		Transportation
	Public Safety and Security	68
	Customer and Personal Service	67
	English Language	62
	Mechanical	55
<b>SKILLS</b>	Reading Comprehension	50
	Speaking	50
	Critical Thinking	50
	Monitoring	50
	Active Listening	47

Source: JobsEQ Analytics

(3) Please provide an analysis of the workforce in the local area, including current labor force employment (and unemployment) data, information on labor market trends, and the

educational and skill levels of the workforce in the local area, including individuals with barriers to employment (WIOA §108(b)(1)(C)).

The labor force for LWDB 10 was 203,683 for the month of November 2019, the most recent data available. This is down slightly from the prior month's 205,416, but up over the prior year, as the labor force for November 2018 was 201,097. The unemployment rate has trended down in the past year to 3.5%, decreasing by about 14% from the November 2018 rate of 4.1%.

WORKFORCE REGION	NOVEMBER 2019			
	LABOR FORCE	EMPLOYMENT	UNEMPLOYMENT	
			LEVEL	RATE
Workforce Region 10	203,683	196,634	7,049	3.5%

Source: Local Area Unemployment Statistics (LAUS)

The educational level of the workforce in the local area is predominately high school graduates for the population 25 years and older at 36.9% for Marion County, 37.8% for Citrus County and 41.4% for Levy County.

Subject	Marion County, FL			
	Total		Percent	
	Estimate	Margin of Error	Estimate	Margin of Error
Population 25 years and over	255,204	+/-154	(X)	(X)
Less than 9th grade	9,296	+/-1,027	3.60%	+/-0.4
9th to 12th grade, no diploma	24,472	+/-1,447	9.60%	+/-0.6
High school graduate (includes equivalency)	94,296	+/-2,638	36.90%	+/-1.0
Some college, no degree	55,299	+/-1,793	21.70%	+/-0.7
Associate's degree	22,429	+/-1,144	8.80%	+/-0.4
Bachelor's degree	32,915	+/-1,475	12.90%	+/-0.6
Graduate or professional degree	16,497	+/-1,054	6.50%	+/-0.4

Subject	Citrus County, FL			
	Total		Percent	
	Estimate	Margin of Error	Estimate	Margin of Error
Population 25 years and over	112,033	+/-205	(X)	(X)
Less than 9th grade	3,650	+/-559	3.30%	+/-0.5
9th to 12th grade, no diploma	10,496	+/-848	9.40%	+/-0.8
High school graduate (includes equivalency)	42,369	+/-1,285	37.80%	+/-1.2
Some college, no degree	25,666	+/-1,230	22.90%	+/-1.1
Associate's degree	9,858	+/-848	8.80%	+/-0.8
Bachelor's degree	12,905	+/-944	11.50%	+/-0.8

Graduate or professional degree	7,089	+/-628	6.30%	+/-0.6
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Subject	Levy County, FL			
	Total		Percent	
	Estimate	Margin of Error	Estimate	Margin of Error
Population 25 years and over	28,851	+/-118	(X)	(X)
Less than 9th grade	1,128	+/-260	3.90%	+/-0.9
9th to 12th grade, no diploma	3,628	+/-435	12.60%	+/-1.5
High school graduate (includes equivalency)	11,934	+/-597	41.40%	+/-2.1
Some college, no degree	6,199	+/-501	21.50%	+/-1.7
Associate's degree	2,517	+/-391	8.70%	+/-1.3
Bachelor's degree	2,183	+/-295	7.60%	+/-1.0
Graduate or professional degree	1,262	+/-258	4.40%	+/-0.9

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

LWDB 10 has well established relationships with our local training providers to provide flexible training services to meet the needs of local businesses. In addition to traditional classroom programs already offered by area training providers, CSCLM is dedicated to meeting the needs of our labor market through several work-based initiatives to 'grow our own' in the demand sectors our board has identified. Work-based training can be provided as a stand-alone service or may be coupled with traditional training approaches to create customized educational tracks. Through close partnerships with area educators, custom designed classroom training can be created for local candidates as well as employees of existing businesses within the region as need arises. These partnerships and the customized trainings developed as a result are a strength of our local area. Two examples of this are the creation of the Commercial Drivers License class A training program that came into operation in January of 2019 at Marion Technical College in Ocala. This program was launched with direct input by industry leaders and tuition funding provided by CSCLM. Additionally, our partnerships with the local technical colleges culminated the current offering of Construction Core classes to begin pipeline development of talent in the construction industry to respond to recent spikes in demand. The Construction Core program provides entry level competencies for individuals entering the construction industry and can be combined with additional training through the recently developed construction apprenticeship at Marion Technical college. We are also in the process of expanding our online course offerings through Metrix Learning (NY Wired for Education) and 180 Skills to better meet the short term training needs of our job candidates and businesses. We are also working with the College of Central Florida and Metrix Learning to develop educational on-ramps and off-ramps to

promote continued educational opportunities through the college. The introduction of additional online training opportunities will act as a feeder into credit and degreed courses through the college. Metrix Learning can also act as a 'value-add' by supplementing existing college curriculum with the training programs of local businesses to create truly business driven training programs.

Training and Education services available to individuals include On-the-Job Training (OJT), Customized Training, Customized Training for Employed Workers, Incumbent Worker Training, Pre-Vocational Training, Basic Skills Training, Occupational Skills Training, and Paid Internships and Work Experience Training.

Our OJT program allows us to partner directly with a business when they are hiring a new employee to assess and identify skills gaps that exist between the candidate's existing skills and those required by the business. This approach allows us to directly address the businesses individual needs. Once the skills gap is identified, a training plan and agreement can be drafted to stipulate the amount of time in which the business can receive financial assistance through the form of wage reimbursements from workforce while they train the new employee on the skills that are required for the position. OJT continues to prove to be a powerful tool to assist businesses that are in need of specific skills that may not be commonly held in today's diverse workforce. OJT is often offered in conjunction with traditional training to provide hands-on training and experience.

Paid Work Experience/Internship continues to be a valuable avenue for students and those with little practical work experience to gain the skills needed to build and refine their resume. It provides up to 12 weeks of paid (by CSCLM) work site training in a specific occupation or industry and proven to be a powerful vehicle for moving individuals into employment.

Though apprenticeships are currently limited in our area, our board recognizes that they can be a strong tool in connecting the workforce with the needs of our businesses. To that end, we are working in tandem with Marion Technical College, Withlacoochee Technical College and the College of Central Florida in the development of additional apprenticeship programs. Marion Technical College has recently launched a masonry program and is in process of starting their construction apprenticeship. The College of Central Florida is expected to launch an apprenticeship in Hospitality in the spring of 2020. Marketing efforts and discussions with local businesses and our partnered educational providers are underway to pave the way in creating the 'second college'. We are also in the process of defining and creating pre-apprenticeship training that will provide the needed preparatory work to ensure a successful and well invested program.

The recent award of our third YouthBuild USA grant allows us to offer pre-apprenticeship training to young adults through our Youth program. The pre-apprenticeship training will include the Home Builders Institute Pre-Apprenticeship Certificate Training (HBI-PACT) with additional skills learned in warehousing, forklift and OSHA training.

In all experiential learning activities, partnering businesses agree to teach the skills necessary to succeed on the job and will provide the same working conditions for the referred individual as other employees. Training outlines that list the skills to be taught according to the agreement are closely monitored. Work sites and trainees are tracked regularly to ensure attendance and progress toward the goal. Staff work directly with the participating businesses to ensure that training is occurring as agreed upon and works as a mediator between the business and trainee when additional employment counseling is required.

All training investments are strategically focused on Targeted Sectors and related occupations.

(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)). WIOA training services are reserved for customers who do not have access to or adequate amounts of other sources of subsidized training such as TANF, VRAP, PELL, etc. The following employment and training services will be available to Adult and DW participants:

- Occupational Skills/Classroom Training
- On the Job Training
- Customized Training
- Customized Training for Employed Workers
- Apprenticeships
- Pre-Apprenticeships
- Incumbent Worker Training
- Skill Upgrading and Re-Training
- Entrepreneurial Training
- Transitional jobs
- Supportive Services
- Case Management
- Follow-Up Services
- Concurrent Education in Job Readiness
- Adult Education
- Literacy Skills
- English Language Acquisition

In keeping with WIOA legislation, our board has determined that our Adult (AD) and Dislocated Worker (DW) program requirements will focus on Work-Based Training Models and Career Pathways. Meaningful Work-Based Models will be relied on to help the candidate maintain relevancy in the job market. Our locally branded Custom

Business Training includes OJT, Incumbent Worker Training, and Customized Training, that can be used to help individuals maintain marketability through skills attainment and upgrades. Programs like these have the added benefit of helping local businesses to maintain their competitive edge through a skilled labor force. The training program should be directly linked to occupations that support the local workforce and economy as outlined in the demand data in Section A.

It is the goal of CSCLM to provide quality assessments and referrals to educational partners to assist candidates in establishing attainable goals. Under WIOA, all Adult and Dislocated Worker enrollments will begin with an Initial Assessment which uses a standardized format that helps staff determine the candidate's individual needs and the level of service required to best assist them in achieving their goals. This Initial Assessment is used to draft the candidate's Individual Employment Plan and to set short and long term employment and educational goals. Candidates' needs will be assessed through an analysis of past experience matched with demand occupations in the area to identify skills gaps. Candidates seeking specialized or technical training may also be assessed with a formal competency and aptitude assessment such as the Wonderlic SLE. This additional assessment will help staff determine an individual's ability to be successful in their chosen career path. Once assessed, a candidate may be determined to have the knowledge, skills and abilities (KSAs) to obtain or retain employment with minimum career services. If they are determined to lack critical KSAs to obtain or retain employment in a demand occupation they may benefit from short-term training, either classroom or work-based. Finally, if they lack most critical KSAs to obtain or retain employment, they will require enhanced career services and training.

On the Job Training (OJT) is designed to assist businesses with the training and employment needs of their workforce meeting specific guidelines so that the business and trainee can maintain a competitive edge in the marketplace. The three unique features of the OJT program are:

- 1) The individual begins training as a new employee or an incumbent worker begins training for a new position
- 2) The individual receives training at the workplace, under appropriate supervision, thus acquiring occupational skills and knowledge in an "on-the-job" training environment
- 3) The trainee is able to earn a wage while in training while the business is acquiring an employee with a well-rounded and specific skill set to match their businesses needs

Under WIOA, local boards may set their reimbursement rate to participating businesses up to 75% of the OJT trainees hourly or salary rate of pay as listed in the WIOA section 134(c)(3)(H). Our local board has determined that participating businesses will receive a 50% reimbursement rate for eligible OJT participants. A 75% reimbursement rate will be established when a business enters into an agreement where the OJT trainee is designated as a focus demographic such as veterans, recipients of cash assistance, individuals with a disability, homeless persons, and criminal offenders.

Classroom Training may be a standalone training component or it can be combined with an OJT or customized training when formal classroom education is needed for the trainee to attain specific skills, credentials or certifications that cannot be attained through work-based training only.

Internships and Work Experience opportunities are planned, structured training and learning experiences that take place in a workplace for a limited period of time and expose the trainee to a specific career path or practical workplace experience. It is our policy that this type of training can be offered to candidates that have received Occupational Skills Training, need additional training and/or practicum in a field of study, or to provide updated skills in order to gain employment. The goals of the Internship and Work Experience programs are to:

- 1) Provide a means to increase the trainee's occupational skills;
- 2) Provide unemployed individuals the opportunity to earn a training stipend while gaining updated skills in a practical environment; and
- 3) Increase the chances of placement in unsubsidized jobs.

Unlike OJT, there is not the expectation that a training agreement will result in a direct hire at the completion of the training. But, it *is* our desire that the business will value the intern/work experience trainee and will consider hiring them into regular, ongoing employment should an opportunity exist or later become available.

Customized Training is made available to local businesses with a need to train their existing workforce. This training may be needed to maintain competitiveness in the current economy, to introduce new skills and technologies to workers and mitigate risk of layoff. Customized Training is a business service and provided as a flexible tool to meet the business' needs. Businesses may be reimbursed up to fifty percent of the overall training costs at the successful completion of the training.

- (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)).

Many workforce investment opportunities exist for youth in the CSCLM area, including but not limited to: paid work experience, traditional occupational skills training, on the job training, internships, mentoring and soft skills workshops.

Youth services are offered to a wide array of youth facing diverse challenges such as previous incarceration, homelessness, substance abuse, and physical impairments. Our community partners include:

- Kids Central – Foster Care
- Bays Area Youth Services – Diversion Program
- Episcopal Children’s Services
- The Arnette House – Foster Care/Alternative Education
- Department of Juvenile Justice
- Cypress Creek Juvenile Correctional Center
- College of Central Florida
- Marion Technical College
- Withlacoochee Technical College
- Marion Technical Institute
- S.R.M.I. Silver River Mentoring & Instruction
- P.A.C.E. center for girls
- Vocational Rehabilitation

Eckerd Connects is currently the local provider of youth workforce investment services in LWDA10. Eckerd is focused on serving youth ages 14-24 with barriers to employment such as basic skills deficiency, offender records and disabilities. The program develops community-wide partnerships and collaborations among state agencies, local municipalities, local workforce development areas, community based organizations, School Districts and Adult Education programs.

Our Phoenix Rising program, currently operated with local formula youth and YouthBuild funding, has proven to be a successful youth model in our community. The 20 week training program provides basic education and construction training to youth with barriers to employment; specifically those without a GED or high school diploma. Youth graduate with a high school diploma, OSHA and HBI credentials, and many also receive Customer Service and Safe Serve Food Handler certifications, as well as Warehouse & Forklift Certification. They are also required to engage in leadership and community service activities. Youth with criminal records who complete this program are shown to have lower recidivism rates. This program



currently has an over 90% placement rate in employment or education. We are currently offering the Phoenix Rising program in Citrus and Marion counties.

CSCLM is also working with industry partners within our Targeted Sectors to increase information regarding careers and training opportunities for our youth. These educational and outreach activities are geared to opening up the minds of parents, educators and youth in regards to good available careers within these targeted sectors.

CSCLM in partnership with its many community and educational partners hosts a Youth Career Expo in the spring of each year in each of our service counties to allow youth in the local high schools to see what occupations and training opportunities are available in our local economy. The Youth Career Expo hosted in Citrus, Levy and Marion Counties will be attended by nearly 1200 middle and high school students with participation from over 90 businesses and 120 community volunteers.

## WORKFORCE DEVELOPMENT AREA VISION AND STRATEGIC GOALS

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

### **Mission**

CareerSource Citrus Levy Marion (CSCLM) brings together citizens, employers and educational providers to develop programs to support high-quality education/training and employment services to meet regional workforce needs.

### **Vision**

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

### **Goals and Strategies**

In July 2014, Congress passed the Workforce Innovation and Opportunity Act (WIOA) to replace the Workforce Investment Act of 1998. Taking effect on July 1, 2015, WIOA provided an opportunity for CSCLM board to review our practices in light of the evolving workforce and economic dynamics within our community. It provided an opportunity to further transform the way the workforce system is doing business and realize a new vision for talent development built around the notion of a

demand-driven system that leverages resources and partnerships to provide an inclusive talent pool.

In February 2015, CSCLM engaged Thomas P. Miller and Associates to facilitate the creation of a strategic plan and assist with the preparation for the implementation of the WIOA. The Board’s goal was to refine its current policies and strategies in light of the vision of WIOA and the opportunities that the law presents.

WIOA establishes an integrated, job-driven public workforce system that links diverse talent to businesses and adopts a broad perspective for talent development by linking with economic development, educational institutions, and other community-based organizations for comprehensive planning, collaboration, and service delivery.

Conversations with the Board, its staff, and community partners revealed several overarching themes for focus areas of the board’s strategic plan. Themes revolve around leveraging current strengths and expanding services to increase collaboration and reach more business and job seeker customers.

Goal 1: Adopt a sector strategy approach that drives career pathways and addresses individual business services

- |              |   |
|--------------|---|
| Strategy 1.1 | Strengthen and/or launch sector partnerships in the region                          |
| Strategy 1.2 | Provide proactive solutions-based business services to individual companies         |
| Strategy 1.3 | Serve as the source of demand information for career pathways in the area           |
| Strategy 1.4 | Strengthen the feedback loop between business services and the CareerSource centers |

Adopting and implementing a sector strategy approach is one of the top priorities of CSCLM which will create a mechanism to ensure career pathways and services to job seekers will be demand-driven and informed by industry.

While sector-based initiatives exist, they can be strengthened through launching more coordinated partnerships that meet regularly to be proactive about meeting the needs of the region’s targeted industries. CSCLM will focus its efforts on industries with the greatest demand, highest wages, expected growth, and linkage with economic development goals. The industries that strategically align are:

- 1) Manufacturing, Logistics, Distribution
- 2) Healthcare
- 3) Information Technology
- 4) Construction
- 5) Hospitality

Sector partnerships greatly contribute to addressing any skills gap issues that exist in the community. Skills gaps can be most effectively addressed when employers come to the table and work directly with partners and service providers to brainstorm solutions – and a sector partnership can provide exactly that “table” to host the conversation. CSCLM is the go-to source of demand information by combining its current LMI capabilities with the information and needs that come directly from these conversations with employers.

In scanning our region, there are multiple industry sector advisory groups, especially in these targeted industries. These groups work as advisory committees to the instructional staff within the three school districts, our two technical centers, and our State college. These groups are vital to communicating specific curriculum design issues on the ground at the point of instruction. We are currently working with Marion Technical College and Withlacoochee Technical College to convene and plan with Industry Leaders and have added CDL, Masonry Apprenticeships and our upcoming Carpentry apprenticeship, as well as consideration to add an HVAC apprenticeship program.

CSCLM continues to build on these strong linkages to create region-wide think tanks for our targeted sectors that will look above the curriculum development level and make recommendations for certifications and degrees that are most necessary to be continued or established within our community. These region-wide sector partnerships will also provide the necessary intelligence needed to guide our area occupational demand list for ITA training and also for focusing our work-based learning strategies.

While strengthening sector partnerships will allow CSCLM and its partners to hone in on collective industry needs and trends, it is also important to continue to provide value-adding, solutions-based business services to individual businesses.

The information gathered through sector partnerships and through targeted services to individual businesses will benefit all other CareerSource services if it is shared widely with staff and other customers. Strengthening the feedback loop means ensuring that information that business-facing staff gather is shared with jobseeker-

facing staff so that jobseekers have a clear and accurate picture of what local employers are looking for in new employees. The reverse communication is just as important – staff serving jobseekers can provide business services staff with a picture of the talent pool, giving employers an idea of where to look for new talent.

Goal 2: Build on the strong service delivery structure to provide access to the comprehensive talent pool

- Strategy 2.1 Expand self-service options available to jobseekers
- Strategy 2.2 Expand connections to vocational rehabilitation and adult education
- Strategy 2.3 Expand work-based learning opportunities
- Strategy 2.4 Expand talent pool to reach professional jobseekers

Input from Board discussions and partner interviews emphasize that the services and delivery structure of CSCLM are effective and appreciated in the community. Access to services is a strength, with multiple locations found throughout the region and two mobile units that help to reach even more areas.

Leveraging technology within service delivery is one of the emphasized roles of a local board under WIOA. Finding effective ways to incorporate technology through self-service options will allow CSCLM to serve more customers and reach new populations who may not be likely to enter a CSCLM career center, such as youth or professional jobseekers. Providing more self-service options also allows case managers to focus more attention on those jobseekers who need the most one-on-one assistance.

CSCLM already has a solid foundation for collaboration with partners, such as vocational rehabilitation. Local partnering is transpiring with Vocational Rehabilitation in both Citrus and Levy counties through quarterly community partner meetings and Vocational Rehabilitation staff handling appointments and informational sessions with the Citrus and Levy County Career Centers. Since the initial development of the strategic plan we have intensified our relationships with Adult Education and Vocational Rehabilitation to find more efficiency in serving common customers or coordinating overlapping services. This means more integration of staff and efficiencies within certain programs. More collaboration and eliminating duplicity allows for an increase in both the number served and the kinds of programs offered.

The Board and CSCLM staff want to make sure the community knows that they provide services for the full range of jobseekers and businesses, including services

geared toward highly-skilled, highly-educated individuals and positions. To make sure this is apparent within the community; specific services for this category of jobseeker have been created and marketed to both businesses and candidates, addressing both the supply and demand side of talent equation. Akken Cloud, which is a robust staffing and recruiting software system, has been implemented to aid in the sourcing and management of applicants.

In Partnership with the College of Central Florida a professional career center has been developed at the Ocala campus. This partnership continues to develop and provides access to not only professional talent, but the continuously evolving talent pool of students in the college system. This career center serves the region and is open to all professional candidates and businesses. The focus for this center is more customized in approach. Staff identifies the specific need(s) of the candidate or business and work towards filling the need(s) through proactive alignment.

### Goal 3: Strengthen board member engagement

- Strategy 3.1                      Develop a robust Board member orientation and education process
- Strategy 3.2                      Focus Board meetings on strategic and/or informational issues and discussions
- Strategy 3.3                      Ensure investments are strategic and support the organization's mission and strategic priorities
- Strategy 3.4                      Clarify ways for Board members to get involved outside of Board and committee meetings

Strengthening board member engagement was the second goal that board members and staff considered a top priority. With the geographic spread of board members across the region, it has been difficult to get members all in one place for meetings. To remedy this, meetings have been shifted to allow for call-in access. While this may have increased participation, it has decreased engagement. Increasing board member engagement will improve the Board's effectiveness and its ability to impact the community through its strategic plan.

To start board members off on the right foot, CSCLM has developed a thorough orientation and education process so that all board members and committee members understand the goals of the Board and their roles as members. These orientations focus on exciting board members, emphasizing their roles in carrying out the vision of the Board and the opportunities they have to contribute.

Orientations for both Board and Committee members can be found on our website: <https://careersourceclm.com/about-us/board-documents-financials/>

- Excite – Initially, it is important to excite new board members about the impact they can have through the talent development system. Promote the benefits they can expect to receive personally and professionally by engaging with the board. Share real, tangible successes of the Board and talent development systems with new board members.
- Engage – Make sure board members understand their role on the board and the value of their perspective, especially business leaders. By relating CSCLM's efforts to their business and talent development needs, board members will have a tangible understanding of how their time and efforts with the workforce system will impact growth at their business and in the community.
- Educate – The workforce system can be a complicated and sometimes confusing world. Focus board member education on the *strategic, big picture talent development strategies* first and layer tactical and operational information incrementally.

All board members interviewed saw staff as highly effective; however, they do not always understand how they as a Board can support the staff's efforts. Providing as many opportunities for board members to drive strategic decisions and get involved outside of board meetings will allow for an increased sense of contribution and impact. This could be through committee work, by volunteering in the CareerSource Centers, at events, connecting us to other employers in their field, and providing testimonials to our services. Additionally, the inclusion of staff members in the Board meetings allows for an interaction with the staff performing the day-to-day work within the Career Centers. Board members representing business should also be encouraged to utilize the services available from the workforce system if they are not already doing so.

After a strong orientation and education program, board members will be most engaged if meeting discussions are kept to a high-level, strategic focus. Ensure that for every Board meeting, a significant amount of time is spent in discussion or on Board education. One way to encourage this is through the use of a consent agenda. Items that need to be voted on can be sent to the Board in advance of the meeting for review, and therefore do not need to be covered in depth during meetings, leaving more time for strategic discussions. Board members felt that if the expectation is set with new members upfront that reviewing materials is expected before the meetings, this could be an effective tactic. In an effort to bolster the

understanding of the work done in the committees a staff member has been partnered with each committee chair and acts as an informational liaison to clarify meeting minutes, provide recaps and additional information if needed for action items and is available to assist the committee chairs in performing their meeting execution duties.

Goal 4: Serve as the convener for talent development in the area

- Strategy 4.1 Map existing efforts and resources for talent development in Citrus, Levy, and Marion Counties
- Strategy 4.2 Analyze the alignment of partner plans to identify areas of convergence and identify gaps
- Strategy 4.3 Identifying collaborative priorities and how individual partner efforts support these efforts

CSCLM staff are well engaged in the community. All partners interviewed noted that CSCLM is very responsive when needs arise, and organizations routinely collaborate on individual tasks or projects. However, many noted that collaboration exists mostly on a case-by-case basis throughout the three counties and there is not a continuous outlet for discussing and tackling some of the larger, more systemic talent development issues.

CSCLM is a logical convener for this collaborative effort, especially as this work is emphasized as an important function of the Board under WIOA. With all partners at the table, the Board can lead the effort to begin mapping out all existing programs and initiatives that provide workforce development-related services to understand the landscape of the region. This will help to align goals and activities across organizations, leverage different strengths and opportunities, and reduce duplication of effort.

Serving as a convener requires a high level of effort, especially in the beginning as regular communication and interaction is initiated. Board members will have the opportunity to spread the word throughout the community; however, it will also have implications for CSCLM staff and may require some reorganization to allow for staff to be dedicated to this effort.

Goal 5: Tell the talent development story of Citrus, Levy and Marion counties.

- Strategy 5.1 Provide labor market information and demand intelligence for the region

- Strategy 5.2                    Ensure messaging accessible and engaging
- Strategy 5.3                    Promote successes – not just ours, the larger community’s too
- Strategy 5.4                    Market expanded services

CSCLM already has a great foundation for communicating its services and successes through its website, social media marketing, and promotional materials. This is a strength that has been leveraged to make sure CSCLM and the Board are the go-to resource for information about the labor market and talent development system in the region.

CSCLM already has access to and provides a wealth of labor market information to others in the area. Regular meeting with economic development and educational partners have opening the door for ongoing information sharing and has created a three point approach to local workforce problem solving.

In addition to having a consistent message, board members can help to shape communications to ensure that they are presented in an accessible and engaging way that will be understood by businesses and jobseekers who may be unaware of government programs and technical terms. To assist in this effort Ambassador packs are being made available to Board members.

Accessibility also extends to the user experience on our website. While the communication put forth on the internet is already a strength, it can be strengthened further by making it as user friendly as possible. Those who are unfamiliar with CSCLM should be able to easily understand the services that are provided and access information that is relevant to their needs. In order to understand what will create the best user experience and be most accessible to customers, the Board can research how people and businesses are currently using the website, where they go for information, and what would be the most effective mode of marketing and outreach.

The Board should be able to tell the “talent development story” for the whole region. This includes not only communicating the services and successes of CSCLM, but also from the community at large. Key audiences for information about talent development in the community include local elected officials, businesses and industry, K-12 education stakeholders (teachers, administrators, and counselors), parents, and job seekers. CSCLM can share information when employers are expanding and creating jobs, when other organizations are holding events, or when customers have success in training programs and landing a position in their career



field. These stories will help communicate who the Board is, what it supports, and the message that it promotes a community-wide, collaborative strategy toward workforce development.

(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.

- Strategy 1: Discuss and document in Memorandum of Understanding what each partner can provide and in what method.
- Strategy 2: Provide to all career center staff introductory and intermediate training on services delivered by each partner agency. This is often done through onsite training facilitated by the different partners.
- Strategy 3: Determine strengths of core programs and how to use those strengths as a core competency for the “system” and avoid duplication of efforts.
- Strategy 4: Share LMI and business intelligence.
- Strategy 5: Meet regularly to enhance services to both our job seekers and business customers.
- Strategy 6: Increase physical and virtual accessibility to our “system” services.
- Strategy 7: Share information and make referral seamless through shared data. Support a shared data system between all core programs.

(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.

CSCLM will remain a high-performing board. Our high performance is accomplished through integrity, oversight, data analysis, continuous improvement and community dialog. We met or exceeded all negotiated measures under the WIOA Indicators of Performance for Program Year 2018/2019 as illustrated below.

Measures	PY2018-2019 1st Quarter Performance	PY 2018-2019 % of Performance Goal	PY2018-2019 2nd Quarter Performance	PY 2018-2019 % of Performance Goal	PY2018-2019 3rd Quarter Performance	PY 2018-2019 % of Performance Goal	PY2018-2019 4th Quarter Performance	PY 2018-2019 % of Performance Goal	PY 2018-2019 Performance Goals

		Met For Q1		Met For Q2		Met For Q3		Met For Q4	
<b>Adults :</b>									
Employed 2nd Qtr After Exit	90.40	106.35	91.80	108.00	94.90	111.65	94.60	111.29	<b>85.00</b>
Median Wage 2nd Quarter After Exit	\$8,090	118.10	\$7,782	113.61	\$7,655	111.75	\$7,825	114.23	<b>\$6,850</b>
Employed 4th Qtr After Exit	88.70	108.17	85.60	104.39	89.80	109.51	89.20	108.78	<b>82.00</b>
Credential Attainment Rate	88.70	104.35	89.10	104.82	91.40	107.53	90.10	106.00	<b>85.00</b>
<b>DW:</b>									
Employed 2nd Qtr After Exit	100.00	120.48	100.00	120.48	100.00	120.48	100.00	120.48	<b>83.00</b>
Median Wage 2nd Quarter After Exit	\$11,339	165.53	\$12,569	183.49	\$12,233	178.58	\$11,003	160.63	<b>\$6,850</b>
Empl	85.70	114.27	88.90	118.53	100.00	133.33	100.00	133.33	<b>75.00</b>

yed 4th Qtr After Exit									
Crede ntial Attain ment Rate	100.00	133.33	100.00	133.33	100.00	133.33	100.00	133.33	<b>75.00</b>
<b>Youth:</b>									
Empl yed 2nd Qtr After Exit	87.00	116.00	85.40	113.87	85.50	114.00	78.10	104.13	<b>75.00</b>
Empl yed 4th Qtr After Exit	65.90	95.51	71.40	103.48	70.10	101.59	77.20	111.88	<b>69.00</b>
Crede ntial Attain ment Rate	92.80	109.18	93.90	110.47	98.50	115.88	98.50	115.88	<b>85.00</b>
<b>Wagne r Peyser :</b>									
Empl yed 2nd Qtr After Exit	66.70	107.58	66.70	107.58	67.20	108.39	68.40	110.32	<b>62.00</b>
Media n Wage 2nd Quarte r After Exit	\$4,841	99.81	\$4,902	101.07	\$4,997	103.03	\$5,120	105.57	<b>\$4,850</b>
Empl yed	69.00	107.81	67.60	105.63	66.30	103.59	66.90	104.53	<b>64.00</b>

4th Qtr After Exit						
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**Integrity**

We make sure that at every level of the organization all actions are taken with a strict adherence to guiding principles, rules, regulations and policy. We provide on-going training to board members and staff regarding their responsibility. We insure that ethical behavior is demonstrated daily. We provide easy access to guidance for all members of the board and staff. Board staff ensures that communication lines are open and that any changes or new guidance are delivered timely.

The financial integrity of our organization is important to insure the proper use of taxpayer funds. Both finance and program staff are trained to insure appropriate decisions are made, documentation is provided, and that the OMB circular 2 CFR Part 200 is followed. We protect Personally Identifiable Information and insure that all records are protected in storage, on-line or through transmission.

We treat all individuals with respect. We provide diversity training, uphold the equal opportunity laws, and seek to increase accessibility.

**Oversight**

CSCLM provides an active level of oversight on all programs, processes, and transactions. We monitor daily interactions and transactions through the use of data queries and separation of duties for critical actions. Separation of duties creates firewalls within our system that creates transparent oversight at all levels of the organizations.

We provide monthly reports on performance to managers and quarterly reports to the Board. The Board receives and reviews these reports in each of its five committees. We provide detailed internal monitoring of our programs, insuring compliance and will begin working with an independent monitoring firm in 2020 in an effort to create an additional firewall and another layer of transparency. All monitoring reports are submitted to management and to the Performance and Monitoring Committee. Our finances are monitored by an external auditor, who provides a report to management and to the committee. Our budgets and financial reports are reviewed quarterly by the Executive Committee. All committee reports are then part of the Full Board agenda.

### **Data Analysis**

We use data analysis to provide the foundational work for oversight, performance, planning and outreach. Data analysis assists in showing where we are and how it relates to performance. It also assists in making sure that our strategies are being correctly implemented or if we need to change the strategy. Data analysis gives us ways to measure success, provide positive feedback, and improve.

### **Continuous Improvement**

Continuous improvement starts with making sure that our customers are happy with the services that we provide. We use the Net Promoter System to measure our customer satisfaction at different points of service delivery. We use this information to look for areas that need improvement and make service delivery changes to impact quality. We aim to not just have satisfied customers, but to have customers who are promoters of our services and system.

We look for ways to make our system more efficient, reduce waste, and save time. Process improvement results in more time to work one-on-one with our customers.

We scan the environment. We look for changes on the horizon and gain knowledge as needed by those changes. We look at how others are “doing workforce” and we learn from them, both here in Florida and across the Nation. We openly share with others to enhance the whole system.

### **Community Dialogue**

We are constant attendees at community meetings. We are active with the Chambers, Economic Development Agencies, Education, Transportation, Homelessness, Early Childhood, Law Enforcement, Re-entry, SHRM, and other agencies and groups that serve our mutual customers. Being entrenched in our communities helps us to be on the cutting edge in program development.

We welcome input and suggestions from the community and customers. We strive to be responsive to these stakeholders.

- (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.

Strategy 1: Ticket to Work. We have been a Ticket to Work Employment Network (EN) for five years. This program encourages individuals who are receiving Social Security Disability to engage in work without the fear of losing their benefits. Staff

are dedicated to assist these individuals in preparing for job search, placement and follow up activities. Our full service flagship career center provides work incentives and disability benefits counseling provided by a staff member who is a certified Community Partner Work Incentives Counselor. Providing this service on-site ensures that job seekers with disabilities who are considering entering or returning to the workforce are presented with all the options and can weigh all the implications a return to work entails.

Strategy 2: Accessibility of services. (1) All of our sites including our mobile units are accessible and in conformance with the ADA. We insure that any new training provider is accessible by conducting an on-site review prior to placing on ETPL list. (2) Multi-Lingual staff are present on site to assist with necessary translation. The most used forms have been translated into Spanish to assist our Spanish speaking customers. (3) We have a strong working relationship with the Center for Independent Living. They provide training to staff, and provide sign language interpretation services as we need them. (4) As we update our website, we will be including a translatable format to increase our on-line accessibility. We insured that our phone message for SNAP was in both English and Spanish. We have also contracted with Universal Tech. Translation Service a provider for interpreting service for use in the event we have speakers of other languages other than English or Spanish. This service is used via telephone so the staff will need to go into the designated safe room with the candidate when using this service since they will need to put the call on speaker, it is accessible via telephone conference call using a designated PIN number.

Strategy 3: Connections with Homeless organizations. The causal effect of disabilities and lack of access to training can often result in homelessness. We have close linkages in our region with the homeless councils and Continuum of Care to ensure the best possible services in our region. We work with other homeless serving agencies to train them on our services, Employ Florida (statewide labor exchange system), resume production and sharing of information for expedient service. They also in turn train our center staff on what services are available so that we can find resources to assist our homeless or at-risk customers.

Strategy 4: Services to Veterans. Through our VETS program we work directly with community agencies serving veterans and provide outreach to encourage veterans that are in need of job seeking services to use our resources. We train other agencies on EF and keep in contact in order to fill our system job listings with veterans first. Veterans who have disabilities are served directly by either our frontline staff or if the disability warrants special services they are then served by our

Disabled Veteran Outreach Program (DVOP) staff. Our close linkage with the community provides us with the knowledge needed to help our veterans not only find employment but to assist with other issues that they may be struggling with. We also work through our Business Services unit to provide strong linkages with business for hiring a Vet and for job fairs such as Paychecks for Patriots. We are committed to provide priority services to our veterans.

Strategy 5: Services to Youth. We focus our youth services on out of school youth who are the most in need. Our youth typically have multiple barriers to employment and often these barriers can interrupt their access to services as needed to progress to self-sufficiency.

(1) Our provider of youth services is well integrated with law enforcement partners. Our team looks at ways to partner on job fairs and to assist in transitioning youth from facilities statewide back into our area. We are currently working with the Marion County Sheriff's Department to provide service overviews to pre-release youth to assist in a smooth transition back into society.

(2) Recruitment of youth is conducted with other youth serving agencies to ensure that we are serving those most in need. We primarily focus on recruiting youth who are homeless, lacking a diploma, engaged with the juvenile justice system, foster youth, youth from distressed and poor neighborhoods and those challenged with disabilities.

(3) Our YouthBuild program is called Phoenix Rising. This program has been in place for 10 years and has built a total of 16 homes in economically distressed areas in our service area. Our current program is set to begin in Spring 2020 and is slated to build four more homes. This program teaches soft skills, provides for a diploma, teaches construction skills and other certifications and places them in employment or post-secondary education. All of this plus the ability to provide a home for a family, the youth learn how to give back to their community and be a hero for someone else.

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

CSCLM vision and goals were developed in 2015 in an effort to align our goals and strategies with WIOA. This work was conducted by the CSCLM Board in a discussion format. The board reviewed a skills gap analysis that was completed the prior year, compared this data with up to date LMI for the region, reviewed commuting data and solidified the strategic plan. Input has been provided in both round table formats and discussion groups and on individual meeting basis, primarily in the development of MOUs. We received input from the following entities:

- Department of Juvenile Justice
- Community Development and Block Grant administrators
- International Brotherhood of Electrical Workers

- Key Training Center
- Center for Independent Living
- Citrus Hearing Impaired Program
- North Central Florida Regional Housing Authority
- Ocala Housing Authority
- Ocala Human Resource Managers Association (SHRM for Citrus & Marion)
- Marion Technical College
- Withlacoochee Technical College in Inverness
- College of Central Florida covering Citrus, Levy and Marion counties
- Rasmussen
- Taylor College
- Department of Children and Families
- Apprenticeship section of the DOE
- Experience Works
- Mid-FL Regional Manufacturers Association
- Health Care Round Table
- Community Action Agencies (Central and Mid-Florida)
- Citrus, Levy and Marion Economic Development agencies & government liaisons
- Kid's Central
- Pace Center for Girls
- Marion County Homeless Council & Continuum of Care
- County Veteran Services
- Silver River Mentoring and Instruction
- Marion County Early Learning Coalition
- Nature Coast Early Learning Coalition
- Arnette House for Youth

**(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)).

Federal performance measures focus on employment, skill development, attainment of diplomas and certificates and wage progression. CSCLM provides strategies that support the growth of our local economies. We insure that our strategies are supportive of the strategies that our local governments and economic developers have developed. Our strategies seek to train the available workforce in skills that are needed in our current economy and for those emergent jobs that will be available in the future. We seek continued and constant input from our businesses and business groups to determine specific areas for training and recruitment. A healthy and growing economy makes it possible for our performance standards to be exceeded.

- We seek methods to assist our job seeking community with eliminating barriers to employment. We offer a full array of workshops to the public that help them to be competitive in landing a job and progressing through their



career. We provide services to all levels of job seekers from entry level to professional.

- We provide support services and referrals to other agencies that make it possible for individuals to successfully complete training or to be competitive in their interviews with businesses.
- We are nimble in our provision of services to both candidates and the business community. We change the delivery of service as needed to meet the needs and look at ways to say yes to a situation that will result in a positive outcome.

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

Our negotiated levels of performance for Program Year 2019/2020 are outlined in the table below. We are exceeding all measures so far for the year thanks to the hard work and dedication of our staff.

Measures	PY2018-2019 4th Quarter Performance	PY 2018-2019 % of Performance Goal Met For Q4	PY 2018-2019 Performance Goals	PY2019-2020 1st Quarter Performance	PY 2019-2020 % of Performance Goal Met For Q1	PY 2019-2020 Performance Goals
<b>Adults:</b>						
Employed 2nd Qtr After Exit	94.60	111.29	<b>85.00</b>	96.00	112.68	<b>85.20</b>
Median Wage 2nd Quarter After Exit	\$7,825	114.23	<b>\$6,850</b>	\$7,088	103.47	<b>\$6,850</b>
Employed 4th Qtr After Exit	89.20	108.78	<b>82.00</b>	91.90	111.39	<b>82.50</b>
Credential Attainment Rate	90.10	106.00	<b>85.00</b>	89.40	101.59	<b>88.00</b>
<b>Dislocated Workers:</b>						
Employed 2nd Qtr After Exit	100.00	120.48	<b>83.00</b>	100.00	120.19	<b>83.20</b>
Median Wage 2nd Quarter After Exit	\$11,003	160.63	<b>\$6,850</b>	\$12,991	189.65	<b>\$6,850</b>
Employed 4th Qtr After Exit	100.00	133.33	<b>75.00</b>	100.00	131.58	<b>76.00</b>
Credential Attainment Rate	100.00	133.33	<b>75.00</b>	100.00	132.98	<b>75.20</b>
<b>Youth:</b>						

Employed 2nd Qtr After Exit	78.10	104.13	<b>75.00</b>	77.70	102.91	<b>75.50</b>
Employed 4th Qtr After Exit	77.20	111.88	<b>69.00</b>	81.60	117.92	<b>69.20</b>
Credential Attainment Rate	98.50	115.88	<b>85.00</b>	98.00	114.89	<b>85.30</b>
<b>Wagner Peyser:</b>						
Employed 2nd Qtr After Exit	68.40	110.32	<b>62.00</b>	72.40	116.40	<b>62.20</b>
Median Wage 2nd Quarter After Exit	\$5,120	105.57	<b>\$4,850</b>	\$5,321	109.71	<b>\$4,850</b>
Employed 4th Qtr After Exit	66.90	104.53	<b>64.00</b>	67.30	104.83	<b>64.20</b>

(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)).

**Fiscal Agent**

CSCLM is the fiscal agent. Indicators used to measure performance are provided through monitoring that is provided by DEO, local monitoring through independent agreed upon procedures, and independent auditing. Monthly reports are also compiled by the finance department and forwarded to the Chief Executive Officer and Executive Vice President for review. Quarterly reports on budget vs expenditures are submitted to the Board for review.

**Contracted Service Providers**

The only contracted service provider at this point in time is our youth services contract with Eckerd Connects. This contract is monitored annually by our internal monitoring staff and is also monitored by DEO. We provide oversight of the program by continuous review of data that details the effectiveness of the programs and insures performance. The reviewed data looks at: numbers enrolled, exits, positive outcomes, placements, follow-up, post-secondary enrollments, and certifications. We also review invoices and documentation for contractual payments and payments of performance benchmarks.

The Career Services provider is currently CSCLM. We have been approved by CareerSource Florida on behalf of the Governor to provide services within the One Stop system.

We review a multitude of reports to measure effectiveness of operations. We have established a system of firewalls to insure appropriate oversight and we review reports provided by DEO on their site and on the Florida Workforce Integrated Performance Reporting System (FWIPRS). We also provide our own queries regarding performance that is required at the federal, state or local level. These reports are pulled weekly, monthly and quarterly. Indicators we review include but are not limited to: Placements, Job Postings, Job fill rate, wage at placement, retention, completion rate, participation rate, certifications, program enrollments, cost per, business penetration, Net Promoter Score, Career Center Traffic,

### **One Stop Delivery System**

CSCLM defines the One Stop Delivery System to be the whole system within our area. This includes the “Career Centers” and the affiliate sites and partners throughout our area. We have established required and additional MOUs with our partners and have determined how best to partner, share resources, and create a resource rich One Stop Delivery System. We project that additional information that we will want to review for effectiveness will include: Numbers served by location, partner services completed in centers, placements and wages by site. We support and encourage the sharing of information and the development of a shared data system for the primary core services.

### **One Stop Operator**

Thomas P. Miller and Associates was procured to be our One Stop Operator in the spring of 2016 (effective 7-1-2017). Operation consists of review of customer/work flow within the centers, services and partner integration between programs and best practices from One Stop systems across the nation. Performance is judged on specific benchmark goals and activities detailed in their cost reimbursement contract, and are reviewed quarterly by the Board.

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

### **ADULTS**

Low-Income: Earning a rate of pay at the local wage sufficiency rate as determined by DEO or less than 200% of the Lower Living Standard Income Level based on family size.

Self Sufficiency: Defined as making at least 200% of the poverty rate and is also the threshold used to determine adult eligibility:

2019 Lower Living Standard Income Level (LLSIL)

Example is a family of one (1):

\$13,778 (Poverty)      \$27,556 (200%)

## **Dislocated Workers**

Earning a rate of pay representing the hourly equivalent of 80% of the layoff wage.

## **Employed Worker**

Based on the average wage of occupations in the Ocala SA associated with the targeted industries in the CSCLM area, it has been determined the self-sufficiency wage level for employed workers is \$29.06 per hour or \$60,462 annually, which allows for an increase to the skill levels of the existing workforce to meet the needs of the business, to leave no worker behind in obtaining and retaining employment opportunities, and to continuously foster economic growth.

## **COORDINATION OF SERVICES**

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

CSCLM has long maintained a holistic approach to partner programs in the workforce system. Aside from Vocational Rehabilitation, Pinellas County Urban League (Urban Older Worker Job Program) and Adult Education providers, all other partner programs are managed directly by the LWDB. Acting under a waiver provided by CareerSource Florida, as provided by the governor, direct management occurs for Wagner Peyser, Workforce Innovation and Opportunity Act (WIOA), Trade Adjustment Act (TAA), Veteran services, Welfare Transition (WT) and the Supplemental Nutrition Assistance Program (SNAP). Youth Services are provided in our three county area under a service provider agreement with Eckerd Connects. To best achieve seamless coordination of services across in-house partner programs, CSCLM has developed two service level options and a common intake process for all customers.

The first service level option is Self Service, or Basic Career Services. This option is available to customers that simply wish to utilize basic services and technology without the need for interaction with staff beyond simple questions and answers. This option works for customers who have a firm grasp on their employment goals and may only need to complete specific tasks such as online job searching, printing resumes, filing for reemployment benefits, etc.

The second service level option is for customers that wish to access the next level of Basic and Individualized Career Services (TEGL 3-15). Our Career Success Plan is a structured intake process that gathers necessary information from new customers at their time of entry into the system. Regardless of the desired service or level of

services we have identified a need to gather specific baseline information in order to best assist and ‘triage’ customers to the appropriate partner program.

Customers are asked to complete a services application, watch an online orientation or attend an in-person orientation to our menu of services and most importantly enter a full Employ Florida (EF) registration including the development or upload of a current resume. Upon completion of the Career Success Plan Intake, the customer meets with a Career development Coach that reviews their information and provides additional details on services that may benefit them and outlines their next steps. Next steps may include (but not limited to):

- Community agency referrals
- Referral and establishment of an appointment for additional career consultation
  - Initial assessment
  - Placement assistance
  - Job referrals
  - Resume Review and Critique
  - Skill Testing (Prove it, Ready to Work, Soft Skills)
  - Provision of LMI
- Referral to CSCLM employability workshops
- Referral to Individualized Career Services (WIOA, WTP or TAA)
- Referral to our Youth Services provider (WIOA)
- Referral to Ticket to Work
- Referral to Vocation Rehabilitation
- Referral to Adult Education
- Referral to the next Welfare Transition or SNAP orientation
- Referral to a Veteran representative for veterans with significant barriers to employment (SBE)

To meet the needs of customers that wish to access services in person and those that prefer to access digitally; this process is available at our brick and mortar locations as well as through our website in online modules and through the use of video chat. Online completers have the option to schedule a personalized appointment with staff upon completion. They may also continue to access services over the phone or through video chat if they prefer not to visit a physical location. At any time a customer may be dually enrolled in a partner program depending on their need. Staff work together to blend and braid services so that the customer does not feel they are being forced to jump through hoops to access the services needed. This close partnership among the programs creates a complete package of services and support services the customer can access to meet their goals.

Since the enactment of the WIOA, we have been proactive in having ongoing discussions with both Vocational Rehabilitation (VR) and Adult Education. CSCLM is currently an Employment Network with the Ticket to Work program, along with a Partnership Plus and pre-employment services provider.

Adult education is a critical component to the development of a quality workforce. All of our Adult Education partners work closely with our case management staff to identify individuals who may qualify for funding assistance under the SNAP, WT and WIOA programs. Our partnerships gained a better footing holding several years ago when charges were placed on GED classes. The costs of the classes and testing became overwhelming for many individuals who were already in the low income or dislocated classifications. Close communication and inter-organizational referrals allowed us to screen enrollees for our various funding streams to assist as many students as possible.

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

CSCLM has long standing partnerships with the Chamber and economic development organizations in our three county area. Our partner organizations are the Citrus County Economic Development Department, Citrus County Chamber, Nature Coast Business Development Council (Levy County), and the Ocala/Marion County Chamber and Economic Partnership (CEP) (Marion County). We have representation on our Board of Directors from each of the three organizations. Staff from our Business Services unit works closely with area EDC staff for a broad range of projects. CSCLM staff is involved in talent recruitment and training development for new and existing businesses, complementing the services of the ED organizations and creating a 'one-stop shop' approach. Staff also work with EDC staff to prepare talent and training availability reports and labor market information for new business development and attraction endeavors.

Each of the EDC's are instrumental in the development and shaping of our Area Targeted Occupation List. This list serves as the primary tool for sharing WIOA approved training and career paths for our area to the public. Discussions with the EDC's involve identifying current business needs as identified from their viewpoint as well as possible training and development that should begin occurring to assist in their business attraction and expansion efforts. This collaboration allows us to begin talent development before a critical need is identified and develop a qualified workforce prior to a business moving to the area.

Additionally, the local division of the Small Business Development Council (SBDC) is co-located with the CSCLM administrative offices on the Ocala campus of the College of Central Florida. Our staff works regularly with the SBDC to form business solutions through combined efforts. CSCLM has been an information access point for individuals and small businesses utilizing the services of the SBDC and has presented various workshops to assist the individuals and businesses in their talent development and training efforts.

CSCLM, the Small Business Development Center, Mid-FL Regional Manufacturers Association, Ocala Human Resource Management Association, and College of Central Florida formed a partnership, the Business and Career Resource Cooperative (BCRC), which focuses on small business to provide training, workshops and information to support the local small business needs.

CSCLM partners closely with the Mid-Florida Regional Manufacturers Association (MRMA), whose Executive Director is co-located in our administrative offices. This direct linkage helps enhance services and provide daily intelligence on the sector, and this ensures direct communication with CEO and the Business Services staff. This is accomplished through an employment sharing arrangement where the work conducted is on behalf of MRMA and CSCLM. This provides in-depth intelligence on hiring needs, salary structures, growth strategies and training needs for the benefit of CSCLM planning and implementation purposes. This has proven to be of great value to our manufacturing community.

- (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)).

CSCLM actively works with the school boards in the development of their Career and Professional Education Act (CAPE) programs. CSCLM and school boards work together to establish and validate the needs of their technical training programs through real time labor market data.

CSCLM also works with each of the school board's adult education arms in the development of their AGE (Adult General Education) and Perkins grant applications to insure that the services delivered mirror the strategies established by the local workforce board.

CSCLM currently staffs and operates the placement assistance office for the College of Central Florida. Our current office is located in the Enterprise Center on the campus of the College of Central Florida in Ocala. This office provides job coaching, workshops and professional placement services for students attending classes at all of our educational providers. It also provides professional level employment services to individuals that enter our system that meet the local criteria for being classified as a 'professional':

- Attained an Associate's Degree plus five (5) years of experience, or
- Attained a Bachelor's Degree, or
- Have 5 years professional experience making \$40K per year or more

This location holds joint branding and staff from the college to facilitate full integration of technical, industry driven educational services available as well as internship opportunities provided through the college for graduates. The internships

provided through the college are melded with CSCLM's initiative of creating industry driven, paid internships and work experience opportunities for recent grads and professionals that require additional practical experience to become employed.

The partnership with the college allows us to identify students coming out of internship programs and will soon be graduating. This allows for direct linkage of trained and experienced talent to local businesses in our area.

Additionally, staff from this office travel throughout the three county region in coordination with CSCLM's workshop coordinator to provide a wide range of workshops to students in K-12, Adult Education, career and technical and college programs with a focus on professional development. These workshops often include:

- Information on CSCLM and available services
- Interviewing skills
- Soft Skills workshops
- Targeted resume development
- Use of social media in your job search
- Navigating the New World of Work (our fundamental workshop for approaching a job search in the digital age)
- Information on grants and other tuition assistance programs

Additionally, we host the Youth Career Expo in each of our three counties. This event is a partnership between the College of Central Florida, Marion County School Board, Community Technical and Adult Education, Ocala/Marion County Chamber and Economic Partnership and the Mid-Florida Regional Manufacturers Association, Citrus County School Board and the Levy County School Board. The Youth Career Expo is hosted in Citrus, Levy and Marion Counties and will be attended by nearly 1200 middle and high school students with participation from over 90 businesses and 120 community volunteers.

The Youth Career Expos are aimed at students in the K-12 system that have been identified as wishing to pursue careers in one of our targeted industries. Students from the school systems will be transported to the events in multiple waves and will have the opportunity to speak with industry specialists about the work they do, typical work environments and the training and certifications required. Students will also be able to meet with area educators to discuss their next steps needed to become equipped for local business expectations. This annual event is held to spark interest in targeted occupations and drive students into technical and degreed career pathways that will provide quality opportunities to support the local economy.

- (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)).



CSCLM understands the importance of supportive services in insuring a customer's success in training or employment programs. Because CSCLM provides direct management of the career centers in our area, programmatic coordination of supportive services is made easier. Customers receiving individualized career services through WIOA, TAA, WT, SNAP or any of our competitive grants (YouthBuild, Sector Initiative) are eligible to receive support services if the need is deemed appropriate by the customer's case manager. Full integration of partner programs within our system allows us to braid and blend funding sources to maximize resources and provide quality assistance to our customers.

#### **WIOA/WT/Competitive grants Support Services:**

- Travel Assistance up to \$10.00 weekly or \$50.00 monthly for full time participation
  - Additional out of area mileage reimbursement
- Bus Passes
- Childcare Assistance
- Needs Based Payments

#### **TAA Support Services:**

- Travel Assistance for out of area job search/training
- Relocation Assistance

#### **SNAP Support Services:**

- Travel Assistance up to \$25.00 monthl

Services may be blended based on funding availability and program eligibility.

- TAA may be served under Dislocated Worker
- WT may be served under Adult or Dislocated Worker
- SNAP may be served under Adult or Dislocated Worker

Funding for support services is limited, so staff provides customer referrals to other community service agencies when funding exists to maximize local resources.

- (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)).

As mentioned in previous sections, CSCLM is currently providing direct management of the career centers in our area. Under this management structure

the following required partner programs exist in each of our brick and mortar locations:

- WIOA Adult, Dislocated Worker and Youth
- WIOA Wagner-Peyser
- Veterans Employment and Training
- Trade Adjustment Act
- Re-employment Assistance Navigation
- RESEA
- Temporary Assistance for Needy Families
- Supplemental Nutrition Assistance Program

Most of the services provided under Wagner Peyser act as the gateway to Individualized Services under other partner programs. Many customers visit a center with basic needs, not fully understanding the entire scope of services available to them. Through effective assessment and triage many Wagner Peyser customers move to Individualized Services under partner programs. Other customers that wish to conduct self-paced and independent job searching may do so.

- (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).

As mentioned in #3 of this section, we are currently working on several projects to strengthen the partnerships with our educational partners as well as bridging the gap between private industry and curriculum development. The selection process and maintenance of our Area Targeted Occupation List (ATOL) is a continuous process that involves our business led committees and Board of Directors. All targeted sectors and their associated occupations as well as the occupations listed on our Area Targeted Occupation List are reviewed and approved by our Career Center Committee and the full Board. This allows for a thorough review of the entire Board membership and input from the private industry members who comprise the majority of the Board.

CSCLM has a local guidance policy (OPS-28 Area Targeted Occupation List and Training Provider Selection) specifically detailing our local policy and procedures for selecting providers and programs for inclusion on our Area Targeted Occupation List. Our intent is to retain specific requirements as defined locally for approval of providers AND programs.

**Provider approval requirements:**

1. At a minimum, all training providers wishing to be listed on the local eligible training provider list must:
  - Be either (a) a licensed public, post-secondary education institution

eligible to receive funds under Title IV of the Higher Education Act, or (b) a private educational institution accredited and fully licensed by the Florida Department of Education (FLDOE), Commission for Independent Education (CIE); or similarly licensed in the state where they originate.

- Meet ADA requirements and sign a certification of compliance with ADA; if applicable.
- Agree to provide performance, programmatic and institutional information on an annual basis and/or when requested by CSCLM (as applicable).

2. Additionally, all providers must:

a. Provide educational services:

- Within Citrus, Levy or Marion counties, OR
- Be listed on the eligible training provider list for the workforce region in which they provide services

b. Allow for a site visit by CSCLM staff prior to final approval.

c. d. Any provider that is determined to have provided inaccurate information or to have violated any provision of the WIOA shall be removed from the eligible training provider list and may be liable to repay all training funding received during the noncompliant period.

e. For continued eligibility, training providers must:

- Maintain proper accreditation and/or licensure through the Commission for Independent Education or applicable state agency, and provide a copy to CSCLM on an annual basis
- Continue to supply timely student based information to FETPIP and CIE, as required.
- Provide updated training program information, i.e., new catalog, specific program updates and cost changes.
- Continue to meet established performance criteria as established by the CSCLM board.

### **Program approval requirements:**

1. All locally approved training programs must have been offered by the approved institution for a minimum period of 12 consecutive months.
2. All proposed programs must (a) be listed on the Department of Economic Opportunity (DEO) issued State or Regional Targeted Occupation Lists, (b) be fully accredited, and (c) allows for the issuance of credentials upon training completion (certificate, degree, diploma) or skills and competencies recognized by businesses.
3. All locally approved training programs must meet at least one of the criteria listed below based on data provided by:
  - a. FETPIP

- an 80% completion rate with at least 70% of the completers found in employment, or
  - an 80% placement rate of training completers (training related placement not required), or
  - a 70% completion rate with one of the following:
    - Placement wages equal to or above the local Lower Living Standard Income Level (LLSIL), or
    - 90% placement rate of training completers (training related placement not required)
- b. Local Management Information System (MIS)
- previous 12 months of local WIA/WIOA/WT placement data that shows all of the following:
    - At least 80% successful program completion rate of trainees no longer in training activities;
    - At least 90% of training completers with employment at closure, OR
    - 80% of training completers with Training Related Placement at closure
    - Average employment wage rate at closure represents 90% of the local LLSIL.
- c. Local
- Quantifiable local data that exhibits an immediate or projected need for training in a specific occupation or occupational field (data approved by the appropriate CSCLM Committees and Board).

All provider and proposed program applications will be reviewed by the Director of Operations and/or the Assistant Director of Career Services for qualification of performance standards listed above upon receipt. Applicants that do not meet standards will be notified in writing of such determination.

Applications that meet the standards established in local policy will be recommended for review by the CSCLM One Stop Committee and Board of Directors. All applications must be reviewed and approved by the full CSCLM board prior to being added to the local ATOL.

Additionally CSCLM is working to establish offerings and referrals for English for Speakers of Other Languages (ESOL) courses as well as GED classes. Our partnership has developed a joint understanding of our eligibility and enrollment requirements, leading our Adult Education partners to make quality referrals to CSCLM staff when they identify a customer that may be eligible for WTP, WIOA, TAA, or SNAP funding.

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

CSCLM leverages resources from all partner programs to assist our WTP and SNAP recipients become self-sufficient. All participants are screened for services that can be provided through WIOA, TAA, competitive grants and career services provided through Wagner Peyser and Veteran Services. Our work-based training services offer a wide array of opportunities to assist in the job development and placement of candidates. Aside from internal partner programs we also communicate regularly with community partners to garner access to additional resources and employment opportunities.

Strategies to assist in placement efforts include resume development and marketing of candidates to our internal Business Services staff who act as ombudsmen to market candidates to local businesses. Hiring incentives offered through work-based training solutions such as OJT, Paid Internship and Work Experience and Custom Business Training also provide opportunities for a harder to serve customer base that may have limited skills.

- (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.

The cooperative agreements that have been negotiated focus on the in-kind contributions of both Vocational Rehabilitation and Blind Services. It is often understood between agencies that the best service one can provide is full understanding of what you can provide. Our MOUs focus on cross training between the partners that will lead to better understanding of services provided resulting in more efficient service delivery, reduction in duplicity of services and more effective referrals. All agencies can value the contributions that the others bring to the table and display those contributions in the MOUs.

### **Division of Vocational Rehabilitation**

Vocational Rehabilitation, while not housed in the One Stop center, is located several hundred yards from our comprehensive center. This close proximity has allowed us to easily exchange referrals and keep open communication between our agencies. We have been working on several projects with VR to provide services to individuals with disabilities as well as conducting cross training between workforce and VR staff to share and develop a full understanding of services available to our mutual customers. Several of those projects include:

- VR staff training on the Employ Florida labor exchange system.
- CareerSource CLM staff training on services and service availability through VR
- Ticket to Work Employment Network participant

- Initial stages of developing curriculum for youth pre-employment training services
- Offering of workshops to VR customers at our locations, and information on hiring events and/or other services that would be of value to their customers

### **Florida Department of Education, Division of Blind Services**

CSCLM maintains a full assortment of assistive technology geared to assist all individuals with disabilities in their job search and employment related needs; particularly those with visual disabilities. Their knowledge of assistive technologies is a tremendous help to the CareerSource CLM staff in understanding how to best use the equipment available in our offices resulting in gains for our mutual customer base. Periodic training is provided to CareerSource staff as a refresher and to ensure our equipment is in good working order.

## **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)).

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

CSCLM Board, with the concurrence of the chief elected officials, requested and received the authority to function as the direct service provider of the area’s one-stop services system. With the assumption of this responsibility, the local area’s workforce business-led system was restructured in a manner that minimized the impact of budget reductions on our unemployed customers, and reshaped and consolidated services for a more efficient system of connecting customers to opportunities with local businesses.

CSCLM delivers all programs and services to customers through its fully comprehensive and diverse workforce development One Stop System. This system is both physical and technological – providing access with a “physical front door” which is through our three Career Centers located in Citrus, Levy and Marion Counties and through “electronic access”. Other required One Stop Partners have been fully willing to negotiate MOUs and coordinate services and provide representation on our board. Community partners allow access to provide mobile One Stop services in outlying areas where transportation to a brick and mortar facility can be challenging for some of our customers.

In the effort of reaching graduates and professionals, CSCLM, in partnership with the College of Central Florida (CF), created a professional center that is located at the College and supported by staff from both agencies. This center was developed to be a mechanism of connectivity for businesses, graduates, professionals and customers in training to assist them in successful employment culmination.

CSCLM operates two mobile units that cover our tri-county area on various days, bringing career center services and programs to those who find it difficult to come to the brick and mortar centers, or those who lack internet to connect remotely. The workforce development system connects many agencies and programs. Within the center in Marion County, older worker Services and Community Action are both housed within the One-Stop. Other partner agencies are reached through our technological and referral door or visit the centers occasionally or as needed to meet with mutual customers.

Under the business model of CSCLM, the following Local One Stop System is in place. The dual goals of workforce development are to provide the talent and skills businesses need to produce and deliver goods and services, as well as raise living standards of working families in America. In order to achieve both of these goals, it is critical to:

- Understand the local labor market and forge strategies to serve both businesses and workers;
- Give candidates and workers effective counseling and access to appropriate training to enable them to earn family-sustaining wages, and
- Assure that the dollars spent on workforce and economic development are spent wisely.

CSCLM's goal of providing a full array of Welfare Transition, SNAP, WIOA, TAA and Wagner-Peyser services, career services and training to our area residents which will assist them in obtaining employment; along with the business-driven services of the Business Services unit, is attained by providing:

- Extraordinary customer service; outreach and recruitment; orientation for services; registration for work; resource area management and coordination; operation of job search assistance workshops; referral to appropriate work or training activity
- Employment referrals; development of employment opportunities; development of subsidized/ un-subsidized employment opportunities
- Eligibility determination; individualized employment plans; referrals to objective assessment services; case management, general and intensive
- Coordination and provision of support services; post placement and job retention follow-up
- Maintenance of records and reporting; individual training accounts management; customer payments (tuition, books, fees, day care, transportation and other support services)
- Veteran services; Job Corps referrals
- Special grants/contracts management; volunteer staff management
- Older Worker services – co-location of staff onsite at the career center.
- Working with faith based and community organizations

- Coordination with Community Action
- Provision of YouthBuild services

All services as a whole are reviewed for efficiency and cohesiveness by our One Stop Operator.

- B. Identify any additional partners included in the local one-stop delivery system.
- Supplemental Nutrition and Assistance Program (SNAP) Employment and Training program;
  - SSA Employment Network and Ticket to Work program along with a CareerSource Citrus Levy Marion sustained Disability Employment Initiative program; and

CSCLM continually seeks out opportunities within the region to develop Workforce Services Agreements with partner organizations including community-based, faith-based, and/or nonprofit organization, as well as employment, education, and training programs that align with our vision mission and strategic goals.

Ongoing partnership development is paramount to our success by ensuring that we are sharing promising and proven practices by doing what is best for our communities to enhance the overall economic development.

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

(Attachment 4)

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

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

All CSCLM offices are ADA compliant and reviewed at minimum once per year for all aspects of continued compliance by the CSCLM quality assurance unit. Additionally, CSCLM has an operating policy detailing the strict programmatic accessibility standards that we hold (*OPS-78 Program and Services Accessibility*).



Each CSCLM office is equipped with a full line of assistive technology to assist individuals with disabilities to include technology to assist visual and hearing impaired individuals. Additionally, all public forms and publications include our standardized notice of EEO compliance:

*“CareerSource Citrus Levy Marion is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers listed above may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711. If you need accommodations, please call 352-840-5700, ext. 7878 or e-mail [accommodations@careersourceclm.com](mailto:accommodations@careersourceclm.com) at least three business days in advance. Additionally, program information may be made available in Spanish upon request. A proud partner of the American Job Center Network.”*

CSCLM is a community partner with the Center for Independent Living (CIL). Partner meetings have been the basis for the development of a Memorandum of Understanding (MOU). This MOU includes periodic and cross agency staff training to not only insure excellent service to individuals entering a career center, but also to insure that all CIL staff are fully aware of, and know how to access our full line of services.

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

Use of universal design is recognized for creating a more equitable and cost efficient work space. Whenever possible, CSCLM uses universal design features to enhance our office experiences. Below is a list of examples of how universal design streamlines the career center experience:

- Collateral available in English and Spanish
- Universal application/enrollments provides expedited movement between partner programs
- Flexible work space within each center to accommodate all users
- Services available in ‘self-service’ format, or available in a staff assisted, one-on-one environment
- All enrollment/application processes are streamlined to essential data
- Sign in Kiosks are available for use with touch screen, mouse or keyboard
- Full color digital information displays in the resource areas
- Use of ergonomic furniture in all resource areas and staff offices and meeting spaces

Efficient universal design allows us to serve more individuals while making few accommodations that can slow the delivery of services.

- 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)).

CSCLM endeavors to offer the majority of services available in a brick and mortar career center in a virtual or electronic format. Our Career Success Plan as well as a full line of narrated training webinars are available through our website. Customers interested in training may also complete the online universal application and can submit their interest for tuition assistance to a CSCLM staff member for review. This digital portal allows a customer to access any service available in the center with the exception of one-on-one, personalized service. Remote one-on-one services may be scheduled with CSCLM staff using video chat for those customers that are unable to visit a CareerSource CLM office.

Additionally, CSCLM has partnered with numerous community agencies to bring workforce services to rural areas where service access is limited. Through the use of our two Mobile Units we are able to bring a full line of services to areas where they would traditionally be unavailable. Our partnership with libraries, food banks, DCF Access points and community action agencies allows customers to access workforce services in a single location.

With the implementation of the Workforce Innovation and Opportunity Act (WIOA) CSCLM has been proactive in increasing our outreach and assistance efforts towards individuals with disabilities. We are currently partnering with the Department of Vocational Rehabilitation and the Ticket to Work, Career Counseling, Information and Referral (CCIR) and Pre-Employment youth program to provide enhanced services to individuals with disabilities that are looking to enter the workforce. We also provide intensive Veteran services within each of our centers, provide outpost Veteran support throughout the community as well as maintain close relationships with local support agencies such as Salvation Army, Center for the Blind, Center for Independent Living, Marion County Homeless Council, Veterans Helping Veterans and Ocala Ritz, a homeless veteran transitional housing institution. One of the key components to creating successful outcomes is targeted and effective outreach.

As part of the business services strategy, CSCLM works with businesses and business groups (such as the local Economic Development Councils, Mid-Florida Regional Manufacturing Association, Ocala Human Resources Management Association) to:

- Learn about their unmet needs and challenges in the workplace;
- Identify areas in which the needs of businesses and candidates for employment can be matched or otherwise customized through negotiation;
- Explore the value of workplace flexibility and otherwise customizing employment in recruiting and retaining a diverse workforce and its usefulness as a tool to maximize productivity;

- Develop customized training resources for the specific skills needed by businesses; and
- Promote paid and unpaid work experiences (e.g., on-the-job training, internships, apprenticeships, etc.) for individuals with disabilities.

Our established relationships with local agencies provide an organic referral process. However, we realize that not all individuals that have disabilities engage the assistance of a social service agency. CSCLM also works closely with our local media partners in print and radio to broaden our umbrella of exposure to our local customer base. We currently run regular columns in the newspapers in our three county region and also host a 30 minute radio show every two weeks on WOCA The Source, 96.3 Talk Radio in Ocala to discuss services and initiatives. Adequate outreach and marketing are the cornerstone to 'spreading the word' about new opportunities and initiatives. Our dedicated Communications Manager uses a multi-faceted approach to reach individuals with disabilities. Social Media, print and broadcast methods are used in promoting services and encouraging individuals with disabilities to engage workforce to assist in their career development and planning. CSCLM is committed to providing services to all customers and to continually work to increase the awareness of businesses on the benefits of hiring people with disabilities.

Each of our Centers is fully accessible and set up with workstations that are specially equipped for individuals with disabilities; these include an ADA compliant computer and the Interpretive System for the hearing impaired, screen reading software, extra assistance filling out paperwork, language interpreters etc. Customers with disabilities are also given referrals (when applicable) to agencies such as Vocational Rehabilitation and Center for Independent Living where they may receive additional services.

Vocational Rehabilitation has an office in Ocala, which is conveniently located around the block from our comprehensive Career Center. The other two locations located close to our area are in Old Town and Gainesville. VR staff are provided itinerant services out of our career center in Chiefland. VR provides medical and psychological assessment, vocational evaluation and planning, career counseling and guidance, training and education, job-site assessment and accommodations, job placement, job coaching, OJT, supported employment, assistive technology and devices, time-limited medical and psychological treatment. They also provide assistance to individuals who have hearing impairment and in partnership with the Division of Blind Services work with the visually impaired.

The Center for Independent Living (CIL), which is a program of VR, has been a long-term and vital partner of CareerSource. CIL provides training to our staff in large group settings and in one-on-one settings regarding working effectively and compassionately with people with disabilities. CIL is also our contractor for interpretive services for both our internal staff needs as well as for our customers. CIL provides this quality service to all of our Centers.

Mental health and addiction are issues that become known through the course of working with our customers. Often these underlying problems make it impossible for an individual to succeed at their job search. Our customers rely on assistance from organizations that receive SAMHSA (Substance Abuse and Mental Health Services Administration) funding as both mental health and addiction services are typically financially unreachable elsewhere. Our two main providers are The Centers in Lecanto and Ocala and Meridian in Bronson and Trenton. There are a number of other help-lines and group therapy methods available along with sliding scale counselors in our tri-county area. The listing of these other services is also found on the local 211 network developed by United Way.

In addition to CSCLM Staff, the business services staff conduct outreach to businesses to develop employment opportunities for veterans; The Disabled Veterans Outreach Program (DVOP), which provides intensive case management services to veterans (especially disabled) to reduce barriers to employment; and, maximization of GI Bill resources to fund training and living expenses while veterans earn college credit and complete career ladder training programs.

CSCLM fully complies with the nondiscrimination and equal opportunity provisions of the following laws: Section 188 of the Workforce Innovation and Opportunity Act of 2014 (WIOA), which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIOA 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; and Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs. The Board also assures that it complies with 29 CFR Part 37 and all other regulations implementing the laws listed above. This assurance applies to the operation of the WIOA Title I financially assisted program or activity, and to all agreements made to carry out a WIOA Title I financially assisted program or activity. The Board understands that the United States, the State of Florida and the DEO have the right to seek judicial enforcement of this assurance. The Board also assures that CSCLM appoints an Equal Opportunity Officer to ensure compliance with the regulatory requirements cited above.

To continue to build self-esteem and provide universal access of services to all customers, those with limited English skills are referred to our educational partners for assistance when needed. While professional language assistance is offered and available to these customers, a database of CSCLM bi-lingual staff who have volunteered to act as interpreters is maintained and available to fellow staff when

assisting customers. Application forms and informational items are being made available in Spanish which is our largest population of non-English speaking individuals. We also make use of Google Translate where necessary along with hiring interpretation as needed.

For ex-offenders, the permanent record of felony convictions can be a substantial barrier to employment. That barrier, coupled with the fact that many ex-offenders may have minimal education and vocational skills, results in a population that can be classified as “at risk” job applicants. Two programs used as valuable supportive tools to help market and promote ex-offender employment are the Work Opportunity Tax Credit (WOTC) and the Bonding Program. Workshops tailored to this population have been created and offered at CSCLM’s Centers.

In addition, CSCLM in partnership with the Department of Corrections conducts workshops at local prisons to inmates who are targeted for release. These workshops provide information on CSCLM general services, Employ Florida job search tips and suggestions on how and where to look for employment opportunities.

CSCLM is actively involved in the homeless coalitions in our area. Having mutual customers it behooves us to be actively involved in addressing the staggering numbers of homeless individuals in our region.

As a whole it is evident through the numerous partnerships and activity we maintain that not only are services offered in our brick and mortar locations, but spread throughout our service delivery area to insure that all residents and businesses in our area have the opportunity to experience the benefits of the One Stop system.

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

As mentioned in the previous section, most of the services that are available within the traditional One Stop offices are also available digitally to those that wish to use them. Below is a list of the core services that are available online:

- Universal Intake and Release of Information
- Full Line of In-Depth and ‘Mini’ Workshops
- Tuition Assistance
- Job Readiness/Coaching via Skype
- Access to candidate forms on our website (programmatic)

These approaches allow us to deliver nearly all services that are offered in some fashion of electronic/digital format. While some customers do not find distance communication a viable form of assistance, many do and appreciate the flexibility and convenience.

CSCLM utilizes an electronic data management system (EDMS), ATLAS (Automated Tracking, Linking and Archiving Solution), which supports programs and

manages our participant records. VOS Greeter (Virtual One Stop) kiosk system is used to track Career Center traffic.

Customers entering the Career Centers or attending an offsite event sign in through the VOS Greeter kiosk system that is either on an actual kiosk or replicated on a tablet. Veterans and program participants are identified by this system and programmatic staff receive automated notifications. Customers are able to choose what category of assistance they need to access upon entering the building. Career Center traffic reports are shared with all of our CareerSource staff, Career Center Committee members and core partner programs. This service also identifies the program, service or partner program the customer has accessed. Quarterly Reports are analyzed to benchmark ongoing customer survey responses and data is utilized for ongoing continuous improvement. These reports are made available to CareerSource staff, One Stop Committee members, Board members and core partner programs. This service also tracks our demographic data. The ATLAS system is also our centralized database for programmatic records retention. Customers participating in WIOA, Wagner Peyser, Welfare Transition, TAA, SNAP E&T are able to scan documents using the ATLAS kiosk system. All programmatic forms are stored electronically in this paperless environment.

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

**1. Selection of one-stop operators:** Meetings were convened with the Executive Committee in order to determine the definition of a One Stop Operator and if the Board wished to be part of the competitive process to be the Operator. It was determined by the Board that services would be procured and the Board would not be part of the bid process.

An Invitation to negotiate was released. One bid was received from Thomas P. Miller & Associates. A Sole Source procurement was approved by the Board. This decision was made on value of the proposed contract as well as past history and work done with the Thomas P. Miller & Associates in this workforce area. The step by step process of the procurement is as follows:

1. Formal Public Notice is made for a minimum of two days prior to ITN issuance in local newspapers
2. All known organizations recognized as being involved in the provision of the requested services are sent a notification of the ITN
3. The ITN package and complete response package is posted and available for review and download on our website
4. Expression of Interest by respondents must be received by CSCLM by the deadline listed in the ITN package
5. All respondent Expression of Interest packets are reviewed. A full determination is made about the demonstrated performance and ability of the organization(s). Capacity to perform successfully under the terms and

- conditions of the proposed program prior to approval being given to proceed with responding to the ITN
6. All respondents are notified of their qualification status after review and are advised if they should proceed with the ITN process
  7. Qualified respondents are required to submit their formal ITN package by the date listed on the ITN release
  8. CSCLM operations staff review all responses and score each organization on a standardized scoring matrix
  9. Staff recommendations for selection are made to the Executive Committee for review. The Executive Committee makes the final selection from the scored respondents
  10. The Executive Committee, at its discretion, may request respondents to present their proposals to the committee for review.
  11. The final selection is reviewed by the Board of Directors. Final selection is at the discretion of the Board of Directors

**2. Appeal Process:** The following appeal process would be used if needed: Any organization that submits a response to the CSCLM's competitive process receives fair and unbiased consideration. In accordance with CSCLM's policy, respondents who are denied funding have the right to appeal. The following steps must be taken for organizations to appeal funding decisions: From the date of notification, any bidder has 72 hours (three business days) in which to file a written appeal/protest with the CEO. At the scheduled meeting of the CareerSource Citrus Levy Marion Board in which final selection of Service Provider(s) is/are to be made (date, time and location of meeting is included in the RFP Package), the board will hear any Appeal(s)/Protest(s). The decision on selecting a One Stop Operator is also approved by the consortium, because of this an appeal may also be made to the three member Consortium; These decisions will be considered final, however, any responder has the right to appeal to DEO if they so desire.

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

CareerSource CLM has been dedicated to continuous improvement of our system to better the services provided not only to our business customers, but to job seeking candidates, as well.

The first step taken toward reviewing service levels and restructuring future service provision began with our implementation of the Net Promoter System (NPS) in 2015. NPS is an automated survey software package that allows our Director of Continuous Improvement to target customer service surveys to specific groups of job candidates that utilize CareerSource CLM services. These targeted groups give real-time feedback based on specific touchpoints that are received as they navigate our system and services allowing for senior management to identify strong areas of service and any areas that may require immediate attention. Several touchpoints that are monitored on a monthly basis include (but not all inclusive):

- Initial use of resource room services
- 6 months after assistance from CareerSource CLM staff
- WIOA training enrollment
- WIOA training outcome and placement
- Veteran Services
- WTP/SNAP services
- Business Services job order processing

Our survey results continue to trend much higher than national averages for other service-based industries. This information drives flexible and fluid service provision to meet the demands of our labor force. Additionally, all negative feedback is handled in a closed-loop fashion by center management. All negatively responding candidates and businesses are contacted to discuss their feedback and to garner input on what improvements can be made to change their opinion.

Aside from customer feedback, the operations unit is focused on identifying and acquiring additional resources to strengthen local services. A focus is placed on identifying competitive grants that align with local sector and service initiatives. The team plays the primary role in creating proposals that enhance our existing services and meet the needs of current labor market trends.

Since 2016 Workforces Services plan was published the team has been successful in being awarded ten competitive grants:

### **Homeless Veterans Reintegration Program**

Serves: 70 Adults and Dislocated Workers

Budget: \$189,070

Duration: July 1, 2017 to June 30, 2018

Purpose: To provide intensive employment and training services to homeless veterans in Marion county. This program includes traditional classroom education and work-based learning opportunities. This program was a partnership between Veterans Helping Veterans, Veterans Village, and Volunteers of America.

### **YouthBuild Phoenix Rising 2017**

Serves: 48 Out of School/At Risk youth

Will result in four (4) homes built for low income families in Marion County

Budget: \$806,096.00

Duration: September 1, 2017 – December 31, 2019

Purpose: Training young adults in construction skills through classroom and worksite training through construction of homes in partnership with Habitat for Humanity, City of Ocala, Marion County, Marion County Sheriff's Office and the College of Central Florida. Participants will also earn a high school diploma during the program through Penn Foster.

### **YouthBuild Phoenix Rising 2019**

Serves: 48 Out of School/At Risk youth

Will result in four (4) homes built for low income families in Marion County

Budget: \$740,737



Duration: January 1, 2020 – March 31, 2023

Purpose: Training young adults in construction skills through classroom and worksite training through construction of homes in partnership with Habitat for Humanity, City of Ocala, Marion County, Marion County Sheriff's Office and the College of Central Florida. Participants will also earn a high school diploma during the program through Penn Foster. Currently planning the first classes to begin in Spring of 2020.

### **Bridge to Skilled Trades**

Serves 120 Youth, Adults, Dislocated Workers

Budget \$1,086,884

Duration: December 1, 2017 – June 30, 2020

Purpose: Expand training and talent pool resources in commercial truck driving and construction to meet current labor market demands.

### **Sector Initiative Grant**

Serves: 30 Youth, Adults, Dislocated Workers

Budget \$249,958

Duration: December 1, 2018 – June 30, 2020

Purpose: Continuation of training conducted in the Bridge to Skills Trades grant. Specifically, a continuation in commercial truck driving.

### **FDOC Grant**

Serves: Up to 55 incarcerated individuals

Budget: \$70,966

Duration: Phase 1 (July – December 2019) and Phase 2 (January – June 2020)

Purpose: CSCLM in partnership with the Department of Corrections will develop and implement a comprehensive employability and technical training program for incarcerated individuals prior to release from Lowell Correctional Institution / Lowell Annex, a state prison in Marion County serving adult females. Staff will conduct workshops which will provide information on CSCLM general services, Employ Florida job search tips and suggestions on how and where to look for employment opportunities.

### **Retail and Hospitality Grant**

Serves: 96 Youth, Adults, Dislocated Workers

Budget : \$99,994

Duration: July 1, 2019 – June 30, 2020

Purpose: Conducted in partnership with the Ocala/Marion County Chamber and Economic Partnership (this area's economic development entity), Marion County Public Schools, and the Hotel Development and Management Group. This grant provides for the development of Retail and Hospitality Academies focusing on soft skills development within the service industries. Participants receive national recognized soft skills credentials (Retail Academy) and Guest Service Gold credentials from the American Hotel and Lodging Educational Institute.

### **Apprenticeship I Marion Grant**

Serves: 20 Apprentices

Budget: \$94,220

Duration: February 1, 2019 – August 31, 2020

Purpose: CareerSource Citrus Levy Marion is implementing an Apprenticeship Expansion project in partnership with local Education, Economic Development and Industry representatives to enhance the existing Trades Core program at Marion Technical College in Ocala, FL. The Electrical Apprenticeship is the only specialty currently available, with a Masonry program scheduled to launch in 2019, followed by the Construction Carpentry program in Spring of 2020.

### **Apprenticeship II Citrus Grant**

Serves: 15

Budget \$52,500

Duration: February 1, 2019 – August 31, 2020

Purpose: The development and implementation of a plumber's assistant apprenticeship program at Withlacoochee Technical College.

### **Apprenticeship III Marion Grant**

Serves: 30

Budget \$149,748

Duration: January 1, 2020 – June 30, 2021

Purpose: The development and implementation of a construction apprenticeship program with Marion Technical Institute in Ocala. This grant also provides staffing funds for CSCLM to hire an apprenticeship coordinator that will assist the local schools with the documentation requirements for all apprenticeship programs.

## **DESCRIPTION OF PROGRAM SERVICES**

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

The CSCLM local workforce system is geographically comprised of Citrus, Levy and Marion counties. This region is a diverse region, which includes very rural areas, small communities, and metro areas. This area includes an active commuter pattern especially notable with patterns moving into and out of neighboring areas to the north and south. I-75 is a primary driver for both commuting and for the distribution path and location for manufacturing. For this reason, a strong partnership has been forged with region's 6, 7, and 9. These four areas work together on talent supply

and training development to meet the needs of their businesses and to encourage growth of new employment opportunities along the major distribution paths in Florida.

CSCLM is publicly funded through varying streams of federal funds. Most of the funding is first received at the State level and then distributed to our area based on federal allocation methodologies. Some of the funding is received directly by CSCLM from other funding sources (ie. Department of Labor) for special grant activities that support our workforce system. CSCLM has developed strong partnerships throughout our community which will be sustained and strengthened under the WIOA.

Our workforce development system brings together a menu of services that can be accessed to fill the needs of our customers. These services are provided in three major ways as a foundation for our system. (1) Those that are provided within our physical career center locations, (2) those services that can be accessed through electronic means and supported by trained center staff, and (3) those services that are provided at affiliate sites.

We have four Career Centers in our area, with one center designated as a comprehensive service center. Two of the other centers currently provide the majority of the required programs with easy access to all programs, and the final center provides services to professional candidate and businesses seeking highly trained individuals.

- Marion County: Our Full Service Career Center is located at 2703, NE 14<sup>th</sup> Street, in Ocala
- Citrus County: Our Career Center is located at 683 S. Adolph Point, in Lecanto
- Levy County: Our Career Center is located at 2175 NW 11<sup>th</sup> Drive, in Chiefland
- Area wide: Our Professional Career Center is located at 3003 SW College Road in Ocala

We also have two mobile resource units (MRU) that we use to serve our outlying rural areas to increase the accessibility to our services and programs. These units have a pre-determined schedule at partner sites that is published on our website, our offices, and at partner offices so that customers know when and where to expect the mobile unit.

Currently, the majority of all required core programs are offered within all of our centers. These programs include:

- Wagner-Peyser (WP) Labor Exchange services are provided by merit staff and supervised by the local area. **Provided in all centers and MRUs**
- Veterans Employment and Training Services (VETS) program to include both the Disabled Veterans Outreach Program (DVOP) and the Local Veterans Employment Representatives (LVER), provided by State merit staff under the

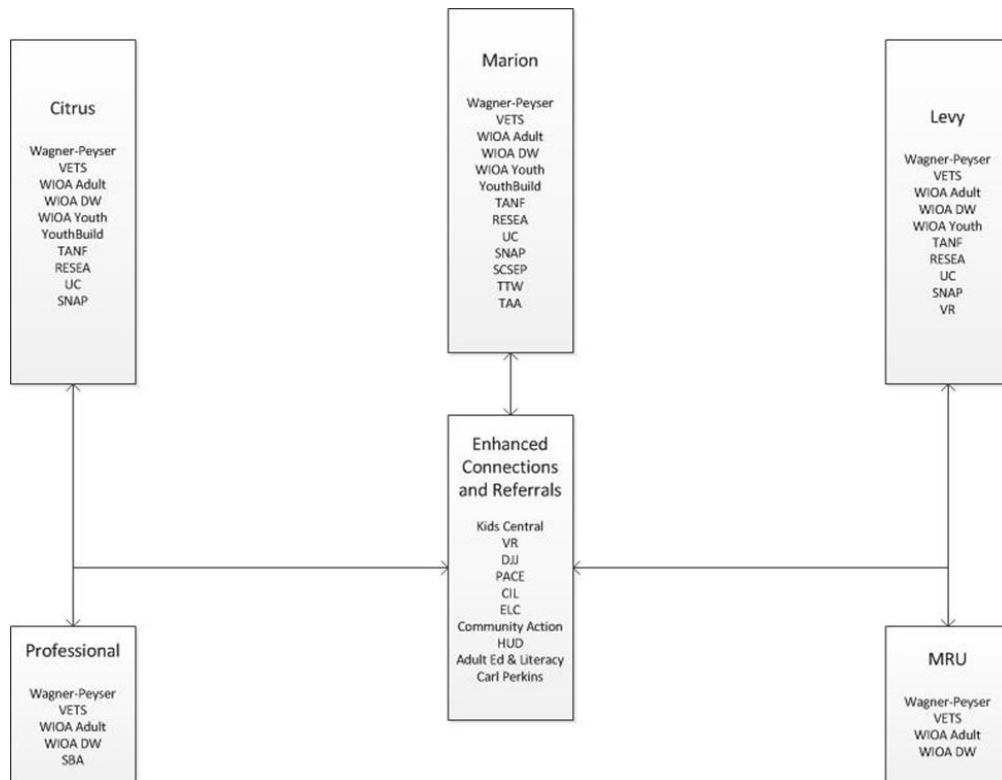
- supervision of the local area. **Provided in 3 Career Centers with trained staff assisting in all others**
- WIOA Adult and Dislocated Worker Self-services, Career Services, and Training Services, provided through direct services. **Provided in all centers and MRUs**
  - WIOA Youth services provided through contract with Eckerd Connects. **Provided in 3 Career Centers**
  - Trade Adjustment Assistance (TAA) is provided by merit staff and supervised by the local area. **Stationed in Marion County Career Center and available in all centers as needed.**
  - Temporary Assistance for Needy Families (TANF) is provided through direct services. **Provided in 3 Career Centers**
  - Reemployment Services and Eligibility Assessment Program (RESEA), provided through direct services. **Provided in 1 Comprehensive Career Center**
  - Re-employment Compensation (UC) information and navigation assistance, provided through direct services. **Provided in 3 Career Centers and 2 mobile units**
  - Supplemental Nutrition Act Program (SNAP), provided through direct services. **Provided in 3 Career Centers.**

Core programs provided within the system through memorandum of understanding (MOU) include:

- Vocational Rehabilitation (VR), services provided through MOU being negotiated at the State level with Department of Education. Local level of services and integration is being discussed and include, **Itinerate Services, direct linkages, plus contract to serve transitioning youth and adult on the job training.**
- Senior Community Service Employment Program (SCSEP) is provided through MOU negotiated locally. **On site in one Career Center with direct linkages for other centers.**
- Adult Education and Literacy Activities is provided through Withlacoochee Technical, Marion Technical and local Colleges. **Direct linkages and through referral.**
- Carl D. Perkins Career and Technical Education Act through Withlacoochee Technical, Marion Technical and local Colleges, **supporting training needs as determined by skills gap in community.**
- Community Action Agencies training and employment services, MOU negotiated locally. **Available in our Comprehensive Center and in Coordination of services & Integrated Referrals in all other centers.**
- Housing Authorities, MOU negotiated at the local level. **Coordination of Services & integrated referrals.**
- Department of Juvenile Justice and corrections services through MOU negotiated locally. **Integrating services for mutual benefit and referrals upon release**

Other employment and training programs within the system include:

- Ticket-to-Work services are provided throughout the area in contract with the Social Security Administration. **Stationed in Marion County Career Center and available in all centers as needed.**
- Small Business Administration services are provided in partnership with our business services. **Located in same building as Professional Center with on-going linkage.**
- Kids Central services for Foster Youth. **Referrals between youth serving agencies**
- Early Learning Coalitions. **Provide refined referrals**
- Center for Independent Living, provide services as needed to individuals with disabilities. **Referrals, training, and accessibility.**
- PACE Center for Girls. **Referrals between youth serving agencies.**



**(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)).

Currently, CSCLM provides direct management and acts as the service provider for the One Stop Centers (including the Adult and Dislocated Worker programs) through an approved waiver granted by CareerSource Florida. However, Youth services are contracted and the text below illustrates the process used to procure that provider.

All service providers are procured per our formal Procurement Policy and Procedures that were developed in compliance with Federal and State laws. All service provider procurements are initiated through an Invitation To Negotiate (ITN). Section 287.057 of the Florida Statutes provides that in certain circumstances where an agency determines "...that an invitation to bid or an RFP (request for proposals) will not result in the best value..." it can opt to use an Invitation To Negotiate. This permits us to focus not only on overall cost of the program, but primarily the quality of service to be provided taking into account historical performance of the organization. All eligible response packages received during the procurement process are retained in hardcopy form in the CSCLM administrative offices and are available for review during routine local, State and Federal monitoring sessions. The following steps illustrate the process:

1. Formal Public Notice is made for a minimum of two days prior to ITN issuance in local newspapers
2. All known organizations recognized as being involved in the provision of the requested services are sent a notification of the ITN
3. The ITN package and complete response package is posted and available for review and download on our website
4. Expression of Interest by respondents must be received by CSCLM by the deadline listed in the ITN package
5. All respondent Expression of Interest packets are reviewed. A full determination is made about the demonstrated performance and ability of the organization(s). Capacity to perform successfully under the terms and conditions of the proposed program prior to approval being given to proceed with responding to the ITN
6. All respondents are notified of their qualification status after review and are advised if they should proceed with the ITN process
7. Qualified respondents are required to submit their formal ITN package by the date listed on the ITN release
8. CSCLM operations staff review all responses and score each organization on a standardized scoring matrix
9. Staff recommendations for selection are made to the Executive Committee for review. The Executive Committee makes the final selection from the scored respondents
10. The Executive Committee, at its discretion, may request respondents to present their proposals to the committee for review.
11. The final selection is reviewed by the Board of Directors. Final selection is at the discretion of the Board of Directors

**(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)).

Our approach to addressing the training needs of our community is a two-fold approach – candidate and business.

CSCLM is dedicated to meeting the up-skilling needs of area businesses through traditional classroom training as well as several work-based initiatives to ‘grow our own’ in the targeted industries. Through close partnership with area educators, custom designed classroom training can be created for local candidates as well as employees of existing businesses within the region. Area educators include The College of Central Florida, Marion Technical College, Marion Technical Institute and Withlacoochee Technical College as well as several private training institutions that specialize in technical occupations. In addition to our top rated education partners, CSCLM also hosts administrative office space for the Executive Director of the Mid-Florida Regional Manufacturer’s Association (MRMA). MRMA is a member of the Manufacturer’s Association of Florida and represents manufacturers and their interests throughout Citrus, Levy, Marion, Alachua, and Sumter Counties. Our co-location and partnership with MRMA has helped us understand the needs and training requirements of local businesses in the manufacturing and logistics industries and has created a direct conduit for information exchange between workforce development and the key stakeholders within these businesses.

- Sectorial training in targeted sectors to increase training capacity to provide the skilled workers businesses need, including through work-based training activities.
- Basic skills/remediation/prerequisite education will also be provided to those participants who do not meet training entry requirements.
- Provision of quality career pathways (ladders/lattices) with well-connected and transparent education, multiple entry points and multiple exit points.
- Focus on demand occupations that lead to industry-recognized certificates or associate degrees and which can lead participants from entry-level jobs to more specialized, higher wage jobs.
- Job coaching and job matching, to include assessment of knowledge, skills and abilities (KSAs) in relation to openings in the targeted sectors, sequenced services, short-term and work-based training structured around an employability plan, longer-term training to lead to higher skills attainment, business engagement, supportive services, counseling, and follow-up.
- Creation of subsidized employment opportunities that will lead to unsubsidized employment.
- On-the-Job Training (OJT) opportunities developed in conjunction with industry partners will be offered meeting OJT requirements: the length of training will not exceed six months and will be based on identified skills gaps.
- Transitional Job Opportunities may be made available to those candidates with barriers to employment that are chronically unemployed or have an inconsistent work history and will be combined with comprehensive employment and supportive services.

- Incumbent Worker Training will be available to assist with costs associated with skills upgrade training for current employees of the company. Businesses will meet the matching Federal Share specified in WIOA.
- Registered Apprenticeship and pre-apprenticeship opportunities in electrical, masonry and carpentry.
- Customized Training will be offered on behalf of a business or group of businesses from targeted industries, which make a commitment to hire successful completers or retain current employees.
- Internships/work experiences that are linked to careers in the targeted sectors may be used for those participants whose KSAs are close to matching the needs of area businesses, but who require a helping hand to update those KSAs and re-engage in the workforce in order to become more competitive during the job search process. Contextualized learning will be emphasized, as well as concrete strategies for placement in unsubsidized employment.

**(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)).

Sector training in Manufacturing/Distribution/Logistics, Healthcare, Information Technology, Construction and Hospitality will be directed by targeted businesses through traditional classroom and work-based training initiatives. Awareness of business needs are identified through our strong partnerships with area educators, industry groups and the businesses themselves. This is done primarily through industry specialized staff in our Business Services unit. Efforts are coordinated at the local level to ensure proper partnerships are formed between training providers, private industry, labor unions, community organizations, workforce development organizations and other key stakeholders to better meet local needs. Our business-led board membership remains at the helm of reviewing all business practices and providing feedback based on their individual sector experience. It is our practice and intent to continue seeking out new grant opportunities that are in alignment with these demand sectors and occupations, allowing us to better serve our customers with increased resources.

Training enrollment options in these sectors allow for multiple points of entry, with training durations ranging from one month to two years. We are fortunate to have well established partnerships with two technical and vocational training institutions in our area. Marion Technical College (MTC) and Withlacoochee Technical College (WTC) have a history of helping us create or reform current curriculums to meet the needs of local businesses in key sectors. Our administrative offices are located on the campus of the College of Central Florida, giving us a direct connection to discuss educational needs at certificate and degree levels as market trends shift and affect local demand sector needs. Our comprehensive work-based training programs can supplement classroom training when specific business needs cannot be met through current curriculum.



Training programs are directly linked to occupations that support the local workforce and economy. This allows us to continue to train talent as needed to match the needs of local businesses. Training providers are reviewed every two years for adequate performance, programmatic and institutional information.

- (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:

CareerSource CLM takes a proactive and multi-faceted approach to maintaining strong relationships in targeted sectors. This is done through continual participation and communication with sector partners.

Our Business Services unit is comprised of Industry Targeted Staff that focus on service provision to businesses in our targeted sectors:

- Manufacturing, Transportation, Logistics
- Healthcare
- Professional and IT
- Construction
- Hospitality

Each staff member is an expert in their related industry and maintains a community presence amongst local businesses. This is done through providing presentations on services available through CareerSource CLM at trade expos, local industry associations, chamber events and other business and industry events. Staff also monitor daily activity on each business's recruiting efforts through the Employ Florida system and strive to source talent when needed to meet the business's needs. Alternative solutions are offered when talent shortages arise, these include On the Job Training, Customized Training and Paid Internship and Work Experience opportunities to assist in the location of fresh talent while offsetting the extraordinary costs of hiring new employees that are not a perfect match to the required skills.

Partnerships are critical to the development of new relationships. CareerSource CLM actively works with the local chambers and economic development partners to provide 'one-stop' solutions to new businesses and emerging industries. Having all pertinent partners at the table during discussions with new businesses or industry representatives provides a holistic approach to business solutions. This approach eliminates the need for multiple meetings and mixed dialog. A consistent message is provided and solutions can be offered that meet the needs in a single meeting while maximizing locally available resources.

- A. Describe how selected industries or sectors are selected based on, and driven by, high-quality data (cite data source used);

This is a primary function of our Board and is facilitated by staff through data obtained from Jobs EQ, Supply and Demand, and Florida Labor Market Statistics. However, decisions are not made solely on statistics as often times singular events can skew data and we look at long term growth and sustainability. We also engage

our local businesses, partner agencies, educational partners, and private sector board members to assist in identifying growing and emerging industries/occupations.

B. Describe how sector strategies are founded on a shared/regional vision;

Our previous strategic planning sessions in 2015 led to the goals and objectives in the 2016 workforce plan (and subsequent modification). This strategic plan remains in effect. This was a culmination of several planning sessions involving private industry, community partners, and cross regional representation. The goal was to provide equal input and cross functionality to meet the needs of the most partnering agencies at once.

C. Describe how the local area ensures that the sector strategies are driven by industry;

All decisions regarding sector strategies are vetted by our private sector/industry led committees and board (including economic development representation). Data and recommendations are presented to the committees and board by CareerSource CLM staff and all final decisions are board driven.

D. Describe how the local area ensures that sector strategies lead to strategic alignment of service delivery systems;

After our targeted industries were established our service delivery model was altered to ballast the efforts. Our Business Services unit was re-aligned to focus on the sectors and provide enhanced talent development and acquisition. Local policy was changed to dictate the focus of our formula tuition and work-based training funds to be focused on the most in-demand occupations within the targeted sectors. Additionally, our Area Targeted Occupation List was reworked and discussions were conducted with partnering educational facilities to support the targeted sector initiatives.

E. Describe how the local area transforms services delivered to job seekers/workers and employers through sector strategies: and

Refer to section D above.

F. Describe how the local area measures, improves and sustains sector strategies.

While decisions on which industries and occupations take into account data and testimony from private industry, we rely on solid data to quantify the decisions made. Input and opinions are considered, but we strive to ensure that the recommendations were not simply anecdotal. All of our tuition based and work based training programs are reviewed annually for positive outcomes. Just as we require data from training providers to substantiate why a program should be considered to be offered in this area, we also hold placement and retention outcomes after training completion to the same standard. Should performance not meet local expectations then the program would be reviewed and either placed in

'probation' status or removed from our Area Targeted Occupation List at the Board's discretion.

- (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)).

Prior to full enactment of the WIOA, CSCLM began the process of developing a strategic plan that would be implemented prior to July 1, 2015. A major component of that plan was to determine the industry sectors that are most prominent or emerging in our area. Planning sessions included third party consultants, educators, community agencies and economic development entities. Through the process it was determined that our targeted industries are: manufacturing, health care, information technology and transportation, distribution and logistics. Most recently in December of 2017 our Board added Construction, and in December 2019 Hospitality to our targeted sectors. Construction was fueled in part by a series of recent hurricanes in the area that created a skill shortage. A general rebound in our economy that had already garnered the attention of the Board has also driven tourism and a need for improved soft skills in the Hospitality sector. The general economic climate is providing for new construction and enhanced travel and tourism throughout our state.

CSCLM has a detailed policy and procedure for the local selection of training providers and their associated programs based on local MIS data and input from area stakeholders. Training providers and targeted occupations are reviewed every two years to determine continued performance and need. Ongoing input from partnering agencies, educators, economic development, and business leaders allows for our Area Targeted Occupation List (ATOL) to be a living document that can change with the current economy and local business needs.

Occasions arise when individuals may wish to attend training out of our area for targeted occupations. This often occurs when a trainee resides near another county/workforce area with a closer training institution. When this happens we refer to the other area's eligible training provider list. Approval for attendance at an educator not on our local list may be given by senior management if the training provider has been vetted and approved by the other workforce area. A denial to the request may be given in instances where the provider has not been approved by the other area.

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

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

CSCLM uses information from the Salesforce software platform as a customer relationship management (CRM) tool to allow best-in-class management of its interactions with stakeholders/businesses. This CRM system allows us to work

together and enhance collaborative opportunities from a business services perspective. Core program partners are engaged in conversations to explore using this system in their business outreach activities to record and share interactions and activities with businesses and prevent duplication while expanding our business engagement across the area.

Business services staff members are targeted to the sector industries of manufacturing, health care, information technology, transportation, distribution and logistics, construction and hospitality. Staff maintain open communication with area businesses to keep abreast of latest industry needs and emerging occupations and technologies.

Outreach events such as job fairs and Youth Career Expos are held across all three counties in the service area. Many of these events are offered in partnership with local industry councils, chamber and economic partners and schoolboard employees, ensuring a robust approach to serving employers through targeted services focused on experiential learning for new and existing staff as needed.

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

CSCLM continues to work closely with all economic development partners, and educational providers to determine needs in the community. CSCLM also works closely with our educational providers and industry associations to coordinate training needs to support special customized programs. During the past several years, CSCLM has worked with the College of Central FL and MRMA to launch several short term training programs such as Commercial Driving, Blueprint Reading, CNC Certification, AutoCAD, Warehouse/Forklift, retails and hospitality soft skills, and Construction Core programs based on needs businesses have expressed. Based on completion of these programs, CSCLM connects graduates with businesses utilizing our Internship program as well as OJT options. In Levy County, CSCLM participates on an advisory committee with the College of Central Florida for their Timber Harvesting program that began in the fall of 2016. Several businesses in the timber industry expressed a concern for the lack of skilled applicants for a growing industry. CSCLM continues to support that program through recruitment, assessment and tuition assistance for short-term training.

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

CSCLM meets regularly with all 3 of our economic development partners to keep informed as well as share information on expanding business, future training needs and/or potential hiring issues with businesses. Staff from our Business Services unit are partnered with employees from the various agency for consistent communication and sharing of information. In Marion County, the Chamber and Economic Partnership (CEP) staff regularly calls CSCLM to advise of issues and/or problems businesses are having with finding qualified candidates. CSCLM staff coordinates with partner agency staff and the businesses to offer services and options such as OJT or Internships and/or hiring events to help support their needs. In addition,

CSCLM attends meetings and/or conference calls set up by the EDCs with perspective businesses to learn of our workforce services and programs to support a new business in the community.

CSCLM has developed several strategies targeted at improving business engagement. As part of our business outreach strategy, CSCLM contracts with each economic development partner to provide information and to coordinate services and training with existing area businesses and their business attraction programs. In addition, CSCLM works with SCORE and our SBDC staff to make our services known and available to small businesses and start-up firms. Through the CEP in Marion County we also work with the Power Plant; a small yet growing business incubator.

In addition, our relationships with the Ocala Human Resource Managers Association (OHRMA), and job listing relationships with staffing firms keep our team abreast of the changing needs of businesses throughout our area.

Our Business Services team works with each EDC partner and each partner is a member of our Business and Economic Development Committee, where they provide updates on economic development at each meeting and can provide input on business strategies conducted through CSCLM's Business Services team.

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

Staff in our resource rooms guide candidates on the process of how to apply online. While at the office, staff offer to the applicant our general services by encouraging them to participate in our Career Success Plan program, advise of our various workshops, our training programs, hiring events and other service to reengage the applicant towards employment.

In addition, CSCLM participates in the RESEA program, which requires a select pool of reemployment applicants that are likely to exhaust their benefits due to limited work skills, education and/or prior experience. The program requires the individual to meet with staff to develop an Individual Employment Plan that will engage them into a more effective and productive job search. Services provided to the individual will range from a formal assessment, identifying barriers, updating and/or support with resume development and providing labor market information.

CSCLM works closely with businesses when we become aware of pending layoffs and/or reduction of staff. CSCLM will meet with the business, advise of our general services and customize services to meet the needs of impacted employees. Customized services can include: on site workshops, resume development, how to apply for reemployment benefits and requirements, advice on training opportunities that they may be eligible for and employment services such as OJT and/or Internships, and/or other employment opportunities.

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

CSCLM's local policy is in alignment with requirements outlined in WIOA. Priority of Service is applied to all Adults applying for services. The specifics of our approach are located in our local operating policy: **OPS-26 WIOA Eligibility/Services Information:**

### **WIOA ADULTS**

Under WIOA, the 'limited funding for priority' provision is removed. It is implied that all WIOA participants that are funded under ADULT formula funding will be served through consideration of Priority of Service. Priority of Service is given to those individuals that exhibit 'multiple barriers' or special priority categories specified below. Funds allocated for Dislocated Workers are not subject to this requirement. Priority is given first to these individuals:

1. Meeting WIOA eligibility under Title I for the Adult Program as defined in the WIOA section 3(2) as a person of or over the age of 18 years old.
2. A resident residing within the geographic borders of Citrus, Levy or Marion counties or a resident of a neighboring county that is seeking employment in Citrus, Levy or Marion County; **and**
3. Is a low income individual as defined in the WIOA Section 3(36)(A) or meets the local definition of low income as specified in WIOA and CareerSource CLM policy.

### **Priority is given when additional barriers are present**

Exhibiting at least one of the following characteristics (Priority of Service):

- Military Veteran
- Belonging to a group designated by the Governor as a special needs group (individuals with disabilities, over 55 years of age)
- Recipients of public assistance
- Receives, or in the past six (6) months has received, or is a member of a family that is receiving or in the Past six (6) months has received, assistance through the supplemental nutrition assistance program, cash assistance through Temporary Assistance for Needy Families (TANF), or is eligible for supplemental security income or any other State or local income based public assistance.
- An individual who is basic skills deficient (For adults, the term "basic skills deficient" is defined in WIOA sec. 3(5)(B) and applies when an individual is unable to compute or solve problems, or read, write, or speak English, at a level necessary to function on the job, in the individual's family, or in society. Priority must be given regardless of funding levels.)
- Is a homeless individual

- Is an individual with a disability whose own income meets the income requirements of bullet number two (2) listed above, but who is a member of a family whose income does not meet this requirement.

**(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)).

CSCLM offers training services that are necessary to fill the skill gaps within our communities. Priority will be given for occupations in our Targeted Sectors. The following methods will be used:

### **Individual Training Accounts**

Individual Training Accounts (ITA) will be used to pay for tuition that is not covered by other funding sources such as PELL. These accounts will be issued to training institutions that have been approved for placement on our Area Targeted Occupation List in accordance with local and State policy.

### **On-the-Job Training**

On-the-Job Training will be offered in an effort to place individuals into jobs within our targeted sectors. OJT will be provided under contract with the business who can be a public, non-profit, or private sector business. Occupational training will be developed based on a training plan that focuses on the skills that each trainee needs to be successful in the particular occupation. In some instances it is necessary to follow a completed ITA with a limited OJT to insure that all skills are gained by the trainee. Our reimbursement for OJT is at 50% of the wage rate. There are instances where a 75% reimbursement rate may be used if the OJT trainee is classified as a targeted demographic: veterans, individuals with disabilities, recipients of cash assistance, homeless, ex-offender.

### **Customized Training**

Customized training will be used to enable the local area to develop training strategies with our education providers that can meet short term employment needs for new or expanding businesses. These training efforts are not typically offered through regular classroom training offered on the Area Targeted Occupation List, but are customized per business or group of businesses who need to fill current or projected vacancies. The businesses will pay at least 50% of the training costs and will commit to hire the individuals once training is complete.

### **Customized Training for Employed Workers**

This training is delivered in much the same way as customized training through the use of an agreement with the business that defines the specific skills to be taught and certifications to be gained. The individual who is trained is already employed by the business but is in need of enhanced training and skills to meet the needs of the business. The focus will be on growing the skill base within our sector industries

and will assist an individual who is not yet self-sufficient to become a self-sufficient wage earner. Businesses will be required to contribute 50% of the training costs.

### **Incumbent Worker**

Incumbent worker training is an effective strategy to use when assisting a business or their employee (of longer than 6 months) with becoming more competitive. This training is designed to meet the needs of a business or a group of businesses in order to retain a skilled workforce and to avert the need to lay off employees by providing training and certifications of new skills needed by the business. No more than 20% of the total Adult and DW funding will be set-aside each year to support incumbent worker training. Businesses will be required to pay the non-federal share of the training costs.

### **Transitional Jobs**

Transitional jobs provide a limited time work experience for an individual who has barriers to employment due to chronic unemployment or inconsistent work history. These jobs help to establish a work history, demonstrate work success, and develop skills that lead to unsubsidized employment. No more than 10% of the Dislocated Worker and Adult funds may be used for transitional jobs. Because this training strategy assists those with barriers it is necessary that it is combined with comprehensive career services and support services. This program is different than an internship or regular work experience.

### **Internships/Work Experience**

Internships are a structured learning experience that is developed within a workplace for a limited period of time. These may be paid or unpaid, but are used to enhance skills and speed up time to employment. This is a very effective strategy for career changes and for entrants into a new career following 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)).

We strive to provide a wide range of training opportunities to our customers as defined in the WIOA. CSCLM drafts an updated Area Targeted Occupation List (ATOL) at the beginning of each program year and updates it periodically as needed throughout the year. This list is a culmination of in-depth data research and discussion with area educators, businesses and economic development entities to insure that our offerings are varied and in demand. This list is maintained on our website. Customers are encouraged to speak with a Career Coach as well as with their educator of choice to make the most informed decision possible. CSCLM staff do not recommend, nor endorse specific providers since all of our locally approved providers and programs have passed stringent performance requirements.

Locally, Individual Training Accounts (ITA) are used for students to access educational services from providers on our ATOL. Customers participating in On the



Job Training, Customized Training, Paid Work Experience or Paid Internship, and Apprenticeships are not subject to ATOL limitations, however, priority usage of funds is geared toward those businesses within our targeted sectors.

Occasions arise when individuals may wish to attend training out of our area for targeted occupations. This often occurs when a trainee resides near another county/workforce area with a closer training institution. When this happens we refer to the other area's eligible training provider list. Approval for attendance at an educator not on our local list may be given by senior management if the training provider has been vetted and approved by the other workforce area. A denial to the request may be given in instances where the provider has not been approved by the other area.

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

A. Describe any ITA limitations established by the board;

Individual Training Accounts (ITAs) shall be utilized to provide training services to WIOA and appropriate Welfare Transition customers. The ITA will be developed after consultation with the Career Coach. Limitations on ITAs exist regarding eligibility, coordination of funds, duration, total amount, support services, and needs based payments. ITA issuance is dependent on available funding and priority is given to those individuals that meet one or more criteria of our priority of service policy.

### **ELIGIBILITY**

WIOA Section 134 (d) (4) (B) limits the use of WIOA funds for training services to instances when there is no or inadequate grant assistance from other sources available to pay for the costs.

### **PROGRAM CHOICE**

20 CFR section 663.310 requires that, to receive training, an individual must select a program of service directly linked to occupations in demand in the area, based on performance information. A State and local generated list of eligible providers along with performance information shall be made available to customers through the One Stop System. Customers may select a program listed on the Area Targeted Occupation List mentioned above, and may select an appropriate training vendor from the CSCLM Approved Training Vendor Listing (*see CareerSource Citrus Levy Marion Policy OPS 34: CareerSource Citrus Levy Marion Approved Training Vendors*)

### **COORDINATION OF FUNDS**

WIOA Section 134 (d) (4) (B) requires the coordination of training costs with funds available under other Federal programs. To avoid duplicate payment of costs when an individual is eligible for both WIOA and other assistance, including a Pell Grant,

20 CFR section 663.320(b) requires that program operators and training providers coordinate by entering into arrangements with the entities administering the alternate sources of funds, including eligible providers administering Pell grants. All sources of funds, excluding loans, shall be considered in determining a customer's overall need for WIOA funds. Participation in a training program funded under WIOA may not be conditioned on applying for or using a loan to help finance training costs.

A primary focus of our customer training and support funds shall be directed at High Skill/High Wage short duration training programs with the remaining customer funds focused on employed worker services. Part-time, employed students, who are traditionally not eligible for Federal Financial Aid, shall be given high consideration when applying for training services.

When the financial aid package together with the funds requested from the regional workforce development board are in excess of the required funds needed to meet the direct training and supportive service needs of the customer, CSCLM funds shall be limited to the amount needed to support the training after consideration of the financial aid package.

20 CFR section 663.320(c) permits a WIOA customer to enroll in a training program with WIOA funds while an application for Pell Grant funds is pending, but requires that the local workforce investment area be reimbursed for the amount of the Pell Grant used for training if the application is approved. Since Pell Grants are intended to provide for both tuition and other education-related costs, the Rule also clarifies that only the portion provided (with Pell funds) for tuition is subject to reimbursement.

It is important to note that the Pell Grant is not school-based; it is a portable grant for which preliminary eligibility can, and should, be determined before the customer enrolls in a particular school or training program. The application for determining eligibility and ultimately the amount of the grant, should be readily available at all career centers for assistance in the completion of these "gateway" financial aid applications.

## **DOCUMENTATION**

It is mandatory that Career Coaches document fund coordination each academic year, using:

1. The customer's financial aid award letter;
2. a copy of the customer's training budget (referred to as the Cost of Attendance budget) developed by the Career Coach and customer using each training vendor's Cost of Attendance calculations as a point of reference;
3. Statements on the IEP that WIOA funds are awarded in coordination with other financial assistance.

ITAs will be limited in duration to a period equivalent to that necessary to attain a "two year" degree or certification. Exceptions exist for individuals that have a two year degree and are striving to attain a four year degree.

B. Describe any exceptions to the use of ITAs.

Exception to ITAs will include Apprenticeships, OJT, customized training, and employed worker training, paid internships and work experience, and contract classes when appropriate. Occasionally, CSCLM will contract with an education provider to conduct a class and allow enrollment up to a specific amount of individuals into the class. This is often done during the execution of competitive grants when the training provided needs to be offered quickly and when the educational provider must insure that the expense of developing and hosting the class does not exceed actual enrollment. These are the only type of contracts related to training authorized by CSCLM and are consistent to those contained in WIOA.

- (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)).

The Florida Small Business Development Center (SBDC) of Ocala is co-located with CSCLM's administrative offices on the Ocala campus of the College of Central Florida. The Florida SBDC provides entrepreneurs with professional business consulting, management training, and vital information they need to grow and succeed in a complex and competitive global environment at no cost. The Ocala office is a full-service center, serving emerging and growing businesses in Alachua, Bradford, Citrus, Dixie, Gilchrist, Levy and Marion Counties. Our staff works regularly with the SBDC to form business solutions through combined efforts. In partnership with the College of Central Florida, SBDC, CSCLM, the Mid-Florida Regional Manufacturers Association and the Ocala Human Resource Management Association (ORHMA), small business training and workshops are offered regularly in all facets of entrepreneurial enterprise. This is a notable access point for individuals and programs are tailored to assist both individuals and small businesses in their talent development and training efforts.

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

Our local area currently offers electrical and masonry apprenticeships through the Marion Technical College and is in the process of adding Carpentry. The College of Central Florida is adding a Hospitality program that will be offered beginning in the spring/summer of 2020. We ensure that opportunities to apply for these training positions are well advertised with our area and within our centers and are made available through public posting of our Area Targeted Occupation List.

We have been in dialogue with both the State office of apprenticeships and with the manufacturing industry to continue the development of new opportunities.

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

CSCLM is proud of the wide variety of training opportunities we provide. It is clear that the WIOA is moving workforce in the direction of more work-based and experiential training. Currently our offerings include Custom Business Training (Customized Training for Employed Workers), Customized Training, On the Job Training, Paid Work Experience and Paid Internship opportunities as well as traditional ITA.

We continue to focus on partnerships between private industry and education. The idea is to firmly link industry, education and workforce to provide a clear stream of communication of current and emerging needs within our targeted industries so that the educators may adapt their training programs to align with those needs.

Increased communications between CSCLM and the public school system has created a valuable talent stream from the K-12 system. The K-12 system's technical certification programs have been aligned to our industry sectors through the requirements of the Career and Professional Education (CAPE) Act. Likewise, the College of Central Florida and Marion Technical College have articulation agreements in place for students moving from technical programs in the K-12 system into career and technical or degreed programs promoting a seamless and unified approach of creating career pathways.

**(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)).

To ensure continuous improvement, CSCLM regularly evaluates the performance level of all contracted service providers and our internally provided services. We use a four pronged approach to this oversight.

- First, regularly scheduled monitoring of provider and internal performance and compliance is conducted by our Quality Assurance department. Immediate prescriptive feedback is provided if/when deficiencies or other general concerns are noted. We are also beginning to conduct third-party monitoring of all of our programs and services to ensure full compliance with local, state and federal regulations and policies.
- Second, all contracted provider staff attend educational "All Staff" meetings several times a year with their CSCLM colleagues. Best practices regarding

various continuous improvement initiatives are trained on and reviewed during these meetings.

- Providers of programs listed on our Area Targeted Occupation List must show strict performance levels for the programs they wish to have included on our list and must undergo review a minimum of every two years.
- Finally, CSCLM uses the Net Promoter System to measure customer satisfaction with contracted and internally provided services. Provider and internal staff members receive a monthly report which outlines their success in creating promoters and enhancing customer service. Feedback received through this process is used to fine tune continuous improvement efforts area wide.

**(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)).

In keeping with WIOA requirements, recipients of youth funds through CareerSource CLM will meet eligibility through defined barriers and be aged 14 to 24 at the time of eligibility. All youth will be classified as In School Youth or Out of School Youth based on their eligibility criteria, and, at least 75 percent of local youth funds must be used to assist those who are classified as Out of School.

Youth enrolled with CSCLM will be prepared for post-secondary educational opportunities or employment. Programs and services will link academic and occupational learning. Youth program service providers will have strong ties to businesses, and services provided to youth must include: tutoring, study skills training and instruction leading to completion of secondary school (including dropout prevention), alternative school services, mentoring by appropriate adults, paid and unpaid work experience (such as internships and job shadowing), occupational skills training, leadership development, and appropriate supportive services. The following services, as stated in 20 CFR section 681.460, will be made available to all Youth participants:

1. Tutoring – the youth provider, Eckerd Connects, partners with the Citrus, Levy, and Marion County School Boards including the two career and technical centers to offer tutoring, academic remediation and study skills training. The following instructional activities and curriculums are available: Computer Based Training, Instructor Facilitated, FCAT and GED practice, GED Prep materials (Khan Academy Online), Practice GED exams, My Skills Tutor (an instructional teacher-aided tool that is also used as a one-to-one instructional resource).
2. Alternative Secondary School Services – offered through Florida Sunshine State Standards in partnership with the Citrus, Levy, and Marion County School Boards Alternative Programs.

3. Paid and Unpaid Work Experiences – acceptable in all industries for our youth programs, can be at either private, for profit and/or not-for-profit businesses or organizations. At least 20% of our youth funding (minus administrative expenses) will be used for work experience activities.
4. Occupational Skill Training – youth will have access to occupational training programs in demand areas offered by approved providers.
5. Education offered concurrently with and in the same context as Workforce Preparation Activities – concurrent training and work prep activities are encouraged to increase the participant’s occupational skills and their eventual placement in an unsubsidized job. Local programs and services will link academic and occupational learning. Basic skill training will be offered to youth in need to assist while they receive occupational or work readiness training to ensure success.
6. Leadership Development Opportunities – these are offered in group settings, where a leadership topic is presented by a student to their peers. Leadership activities can also take place in the form of community service and volunteer work. Employability Skills and Life Skills curriculums also include leadership development activities.
7. Supportive Services - are available to Youth participants when they are necessary to enable an individual to participate in activities through CSCLM. Supportive services take place in the form of transportation assistance, clothing and uniform allowances, and background checks and childcare. Additional services may be provided and are reviewed on a case-by-case basis.
8. Adult Mentoring – occurs in partnership with other agencies and businesses, independently driven by participant needs. All mentoring activities are case managed and documented.
9. Follow Up Services – are provided for the 12 months following the Youth’s exit from the program and will take place once every quarter. Career Coaches will monitor the Youth’s progress on the job or in a training program and provide counseling/mentoring as needed.
10. Comprehensive Guidance and Counseling - may be offered through the local youth provider or through a partnering community agency. Will be ongoing through intensive case management or community/locally based programming.
11. Financial Literacy Education – will be provided as part of Work Readiness Training activities in a class setting or individually.

12. Entrepreneurial Skills Training – youth will have access to programs offered through the local Small Business Development Center and Chamber offices in partnership with CareerSource CLM. Community partners and business shadowing may be part of this on an individual basis.
13. Labor Market Information – Youth will have access to up to date Labor Market Information that identifies job vacancies, skills necessary for in-demand jobs, and provides information about local, regional and national employment trends. This will be provided in conjunction with Work Readiness Training.
14. Transition Activities to Post-Secondary Education and Training – career coaches will guide and refer to colleges or technical schools. They will also assist with career exploration and checklists detailing items/activities needed for training/education in their chosen field. Financial aid application assistance will also be provided.

CSCLM has long operated a successful Youth program called Phoenix Rising currently funded by YouthBuild dollars that employs these 14 program elements. This is a community partnership that concentrates on service learning where participants build a house, learn basic construction skills, and engage in leadership activities and classroom training as they work to earn their high school diploma. To date we have been awarded 3 YouthBuild grants through the Department of Labor.

If summer programs are provided to youth, the summer employment opportunities will be linked to academic and occupational learning. The mix of year-round and summer activities is left to local discretion and CSCLM does not maintain a separate appropriation for a “summer” program.

- 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).

Assessments are used to determine proficiency levels. The most common assessment used is the TABE. Youth are assessed to a grade level of 9. Those youth that lack comprehension or need additional assistance in understanding the assessment may be assisted by a qualified proctor. CareerSource CLM typically assesses mathematical and reading/language comprehension. The assessment results that are scored to less than a 9<sup>th</sup> grade education are deemed as deficient and therefore 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. One on one assessment may be also be

conducted if the customer expresses concerns with their ability to complete a formal assessment. This information may also be shared with the case manager from an educational partner that has also completed such assessment and has deemed the individual deficient.

**B. Define “requires additional assistance.”**

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

The local board classifies the above statement as being valid in regards to eligibility when back-up is presented to the case manager when the following characteristics exists (per local policy *OPS-39 WIOA Eligibility Documentation Listing*)

- A youth that while attending secondary education received/is receiving services under an IEP (Individualized Education Plan), or
- A youth that while attending secondary education compiled/is compiling a record of disciplinary problems as manifested by the mandatory attendance at detention, an alternative school, expulsion, suspension, or participation in an in-school suspension program, or
- A youth that has completed an education program but lacks the appropriate license for the occupation, or
- A youth whose financial aid package is less than or equal to 80% of the federally estimated cost of attendance for the post-secondary institution where enrolled, or
- A youth who has a certificate of attendance from a secondary school system, or
- A youth who has certification/licensure from another state and must challenge the requirements of this state. (Fees for examination of records and eligibility for certification/licensure in this state, fees for license testing preparatory sessions)

Documentation requirements include:

**Documentation from an Educational Provider**

- Program/School System
- Applicant Statement
- Letter from Business or Educational Staff
- Staff Member
- Telephone Contact Form from a School System

**Letter from the School**

- Telephone Contact Form from a School System

**Copy of the Certificate of Attendance**

**Copy of Certificate or License**

**Letter from the School/Financial Aid Office**



**SIGNATURE PAGE**

This plan represents the efforts of CareerSource Citrus Levy Marion to implement the Workforce Innovation and Opportunity Act in the following counties: Citrus, Levy, and Marion.

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

**Workforce Development Board Chair**

**Chief Elected Official**

**Rachel Riley**

**Jimmy T. Smith**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

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Date

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Date

ATTEST: \_\_\_\_\_

**END OF LOCAL PLAN INSTRUCTIONS**

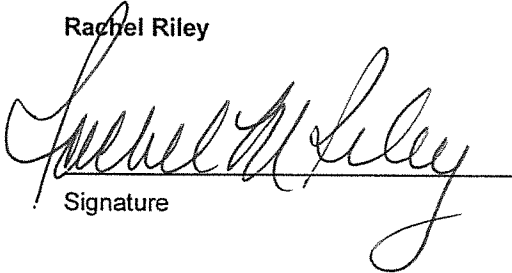
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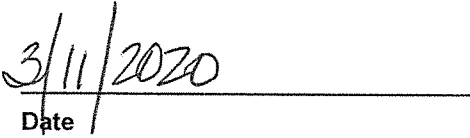
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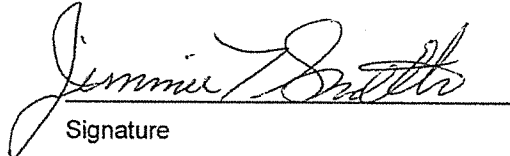
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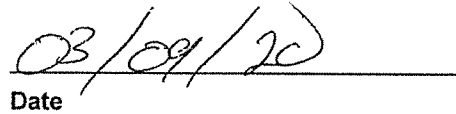
  
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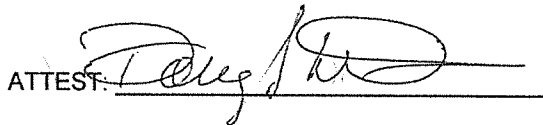
  
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**Chief Elected Official**

Jimmy T. Smith

  
Signature

  
Date

ATTEST: 

**END OF LOCAL PLAN INSTRUCTIONS**

# MEMORANDUM OF UNDERSTANDING

Between

Citrus Levy Marion Regional Workforce Development Board, Inc.  
DBA CareerSource Citrus Levy Marion

And

the Citrus County School Board

## 1. Purpose of this Memorandum of Understanding

The Workforce Innovation and Opportunity Act (WIOA) requires that a Memorandum of Understanding (MOU) be developed and executed between the local Workforce Development Board, in this case, CareerSource Citrus Levy Marion (CSCLM) and the Career Center Partners. This Act requires specific programs to make their services available through a one-stop delivery system, and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSCLM and the One-Stop system partners to establish an agreement concerning the operations of the one-stop system and to establish the framework for providing services to employers, employees, job seekers and others needing workforce services.

Florida's one-stop delivery system, the CareerSource Network, is a locally-driven system which develops strategic partnerships and provides streamlined and integrated programs and services to the businesses and citizens of Florida.

Florida's strategic vision for WIOA implementation will be 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.

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by using TTY/TDD equipment via the Florida Relay Service at 711. If you need accommodations, call 1-800-434-5627 ext. 7878 or e-mail [accommodations@careersourceclm.com](mailto:accommodations@careersourceclm.com) three business days in advance. A proud member of the American Job Center network.

These objectives will be accomplished locally by providing all customers access to high-quality career centers within a one-stop system that connects them with the full range of services available in their communities, whether they are customers seeking to find jobs, build basic educational or occupational skills, earn a postsecondary certificate or degree, or obtain guidance on how to make career choices, or are businesses and employers seeking skilled workers.

The purpose of this MOU is to establish or enhance a cooperative working relationship between CSCLM and the Citrus County School Board and to define our respective roles and responsibilities in achieving the policy objectives.

## 2. System Partners

MOUs will be developed with system partner programs that are provided physically within the center, provided through cross-training of partner staff, or provided through direct linkage from technology. The partner programs and targeted population programs available in CSCLM will be:

### **Locally Operated by CSCLM through agreement with DEO**

- WIOA Title I Adult, Dislocated Worker and Youth\*
- WIOA Title III Wagner-Peyser\*
- Veterans Employment and Training\*
- Trade Act\*
- Unemployment\* (Primarily provided at State level)
- Temporary Assistance for Needy Families\*
- Supplemental Nutrition Act Program (SNAP)

### **Locally Operated by CSCLM through agreement with DOL**

- YouthBuild\*

### **MOU Provided at State Level**

- WIOA Title II Adult Education and Literacy\*
- WIOA Title IV Vocational Rehabilitation\*
- Carl Perkins Career and Technical Education\*

### **MOU with CSCLM**

- Title V Older Americans Act aka SSCEP\*
- Job Corps\*
- Community Action Agencies\*
- Housing Authorities\*
- Agencies serving individuals with disabilities
- Agencies serving youth with barriers to employment
- Early Learning Coalitions

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- Homeless Continuum of Care organizations
  - Veteran Agencies
  - Economic Development
  - Support Service Providers
  - Others as determined to be beneficial to serving both employers and job seekers.
- \* denotes those that are "required" partners

### 3. One-Stop System Description

As designated by CareerSource Florida on behalf of the Governor, CSCLM is the local workforce board and the regional planning area, under Title I of the WIOA. Currently CSCLM has been provided permission to provide and act as the One-Stop Operator and Career Services Provider.

The CSCLM area consists of the counties of Citrus, Levy and Marion with Career Centers located in Lecanto, Chiefland, and Ocala. The Ocala Career center located at 2703 NE 14<sup>th</sup> Street is the comprehensive center for CSCLM. A professional placement center is located at the College of Central Florida Campus in Ocala for specialized recruitment and placement of professionals throughout the region and in partnership with our training partners. CSCLM also has two mobile units to assist in providing services to remote and rural areas within the region.

All of our centers provide seamless access to workforce programs for both the job seeker and the employer. Our system is linked through Employ Florida, the State's talent matching system, to provide a system wide approach for job seeking and job placement.

Our centers provide access to a multitude of services that can be obtained through either self-service or with assistance from staff. By blending and weaving our various funding streams we are able to provide services to customers without pushing a customer from program to program, but handling in a customer driven manner based on individual strategies.

The One-Stop System is the result of the partnerships developed within our region that links the programs and services provided at the Career Centers and at other partner locations that provide the full complement of services needed by our customers.

This MOU will increase our ability to serve mutual customers, reduce duplication of efforts and expand our abilities to provide services throughout the One-Stop System either in one of our Career Centers, electronically at your location, or as an affiliate site.

### 4. General Responsibilities of One-Stop System Partners:

- The One-Stop System partner agrees to participate in joint planning, plan development, and modification of activities to result in:

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by using TTY/TDD equipment via the Florida Relay Service at 711. If you need accommodations, call 1-800-434-5627 ext. 7878 or e-mail [accommodations@careersourcefla.com](mailto:accommodations@careersourcefla.com) three business days in advance. A proud member of the American Job Center network.

- o Continuous partnership building;
- o Continuous planning responsive to State and Federal requirements;
- o Responsive to specific local and economic conditions including employer needs;
- o Solutions to common data collection and reporting needs;
- Make available to customers through the One-Stop System the services that are applicable to the partners programs
- Participate in the operation of the One-Stop System consistent with the agreed upon "service integration" following in the next part, number 5
- Participate in capacity building and staff development activities
- Insure that all partners and staff are cross-trained to understand programs and specific "service integration" goals as specified in the next part, number 5

##### **5. Service Integration Plan and Goals:**

CSCLM and the Citrus County School Board

agree to the following:

This agreement establishes that the duly authorized agent of the recipient agrees to satisfy the requirements of 34 CFR 361.505 and 34 CFR 361.720.

This agreement formalizes the existing partnership between CSCLM and the Citrus County School Board to provide adult education and workforce services to our mutual customers. CSCLM and the Citrus County School Board recognize that blended services provided by all required and optional partners contributes to the One Stop 'system' and neither independently creates the 'system'. The combination of services provides employment and educational counseling and access to partner programs through direct referral and electronic access points within each office. CSCLM customers are counseled on all aspects of employment and education options available through educational entities and funding assistance provided through Titles I, II and IV funds under the WIOA. Appropriate referrals for intra-agency assistance are made between agencies through established contacts within each department and will be made in writing via e-mail between those contacts. The Citrus County School Board may refer training program completers and those customers in need of additional financial assistance to CSCLM for assessment and counseling regarding their individual needs.

Both agencies agree to maintain full programmatic accessibility and compliance with all applicable laws to ensure that individuals have equal ability to access available services as further discussed in sections 8 and 9 of this document. This access includes full ADA compliance, use of assistive technology and provision of accommodations that may be necessary for individuals with additional barriers.

This agreement exercises the DOL issued extension of the Infrastructure Funding Agreement (IFA) requirement until the established deadline of January 1, 2018. This extension is described in TEGL 17-16, section 14 issued on January 18, 2017. Both parties acknowledge and agree to the requirement of the IFA and are currently working with CSCLM's One Stop Operator to develop a mutually beneficial agreement that defines and monetizes each partners proportional use of the One Stop 'system'. The completed IFA will be mutually agreed upon and will become an attachment to this document.

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**6. Resource and Cost Sharing**

This MOU between CSCLM and the Citrus County School Board  
is an agreement of service provision.

**7. Data Access and Sharing**

To facilitate integration of services, partners are encouraged to provide cross-access or protected information from systems of customer data within the applicable federal and state privacy laws and regulations governing the partner programs. All state and federal confidentiality regulations regarding the creation, maintenance and/or use of records shall be in effect. Client records and/or information may be shared among partners subject to these confidentiality requirements. Data sharing arrangements will be included in section 5.

Client information shall be shared solely for the purpose of eligibility, enrollment, referral, or provision of services. In carrying out their respective responsibilities, each party shall respect and abide by the confidentiality policies of the other parties.

**8. Access for Individuals with Barriers to Employment**

All One-Stop system partners will ensure access for individuals with barriers to employment, and will offer priority for services to recipients of public assistance, other low-income individuals, or individuals who are basic skills deficient for individualized career services and training services funded with WIOA adult funds.

**9. Non-Discrimination**

As required by federal and state law, participating agencies will assure that no person shall be discriminated against in consideration for or receipt of partner agency services and/or employment based upon sex, disability, race, color, age, religion, national origin, political affiliation, belief, veteran status, familial status, sexual orientation, gender identity, pregnancy, or genetic information.

The One-Stop system partner will assure compliance with the Americans with Disabilities Act of 1990, and its Amendments, which prohibits discrimination on the basis of disability, as well as applicable regulations and guidelines issued pursuant to the ADA.

Partners agree to comply fully with the WIOA, Title VII of the civil rights act of 1964, the Age Discrimination Act of 1975, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities, and The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and

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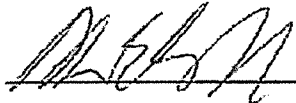
29 CFR Part 37 and all other regulations implementing the aforementioned laws.

**10. Duration, Modification, and Termination of the Partner MOU**


It is mutually understood that this MOU shall not become effective until signed. This MOU shall remain in effect until the date below, or until it is modified, extended or terminated in accordance with this section. Regardless of duration, this MOU shall be reviewed every year. This MOU may be amended at any time in writing and will be effective when signed by both entities. Either party may cancel its participation in whole or in part at any time with thirty (30) days written notice. This MOU will be in effect until: June 30, 2020.

**11. Signatures**

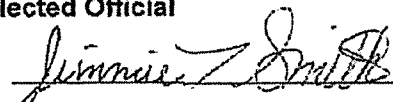
**Approved for Citrus Levy Marion  
Regional Workforce Development  
Board, Inc.:**

By:   
Name: Thomas E. Skinner, Jr.  
Title: Chief Executive Officer  
Date: 8/30/17

**Approved for:**  
the Citrus County School Board

By:   
Name: Virginia Bryant  
Title: Chairman  
Date: 10-24-17

**Chief Elected Official**

By:   
Name: Jimmie T. Smith  
Title: COMMISSIONER, CITRUS COUNTY  
CONSERVATION CHAIR  
Date: 8/30/17



# MEMORANDUM OF UNDERSTANDING

## ADDENDUM for Infrastructure Funding Agreement

Between

Citrus Levy Marion Regional Workforce Development Board, Inc.

DBA CareerSource Citrus Levy Marion

And

Citrus County School Board

### 1. Purpose of this Addendum

The Workforce Innovation and Opportunity Act (WIOA) requires that a Memorandum of Understanding (MOU) be developed and executed between the local Workforce Development Board, in this case, CareerSource Citrus Levy Marion (CSCLM) and the Career Center Partners. This Act requires specific programs to make their services available through a one-stop delivery system, and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSCLM and the required One-Stop system partners to establish an agreement concerning the operations of the one-stop system and to establish a mutual agreement that details how each required partner will contribute to the overall infrastructure costs of the One Stop system.

This document serves as an addendum to the previously signed MOU and details the contributions of each partner in regards to supporting the infrastructure of the system. Additionally, the duly authorized agent of the recipient agrees to satisfy the requirements of 34 CFR 361.505 and 34 CFR 361.720

### 2. Infrastructure and Cost Sharing

All partners within the Citrus Levy Marion One Stop system operate with lean budgets and have long standing relationships that have been established to braid and blend funding to maximize the impact of resources available to the citizens of our region. Due to this, the partners on this MOU are not currently co-located within the American Job Center, but provide support of its operations through in-kind contributions that have positive monetary impact on the day to day operations and expand the breadth of services available. CSCLM and the partner as listed on the originating MOU agree that infrastructure support for proportionate benefit from the One Stop system is provided in the following methods:

- Use of digital technology for shared customers to access online resources provided by CSCLM
- Provision of CSCLM outreach materials to the general public
- Educational support and counseling to CSCLM referred and enrolled students
- Access to classes in targeted occupations to enhance local talent pipeline
- Access to meeting space within the partner's facilities to meet with students to discuss CSCLM services and programmatic enrollment
  - Space usage provides expansion of services for CSCLM and reduces additional costs of itinerate space when needed

MOU Addendum

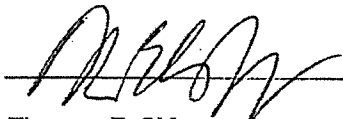
- Ongoing partnership for outreach and connection of Adult learners to the One Stop system

**3. Duration, Modification, and Termination of the Partner MOU Addendum**

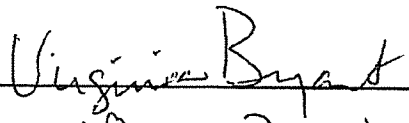
It is mutually understood that this Addendum shall not become effective until signed. This Addendum shall remain in effect until the date shown on the originating MOU and may be modified or terminated at any time by either party.

**4. Signatures**

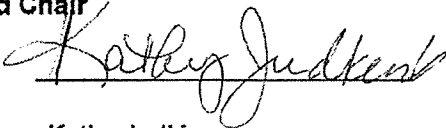
**Citrus Levy Marion Regional  
Workforce Development Board, Inc.  
d/b/a CareerSource Citrus Levy  
Marion**

By:   
Name: Thomas E. Skinner, Jr.  
Title: Chief Executive Officer  
Date: 10/26/2017

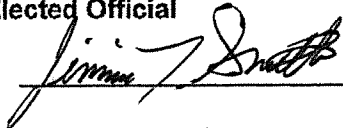
**Citrus County School Board**

By:   
Name: Virginia Bryant  
Title: Chairman  
Date: 10-24-17

**Board Chair**

By:   
Name: Kathy Judkins  
Title: Board Chair  
Date: 10/26/17

**Chief Elected Official**

By:   
Name: Jimmie T. Smith  
Title: Commissioner, Citrus County  
Consortium Chair  
Date: 10/31/17

MOU Addendum

# MEMORANDUM OF UNDERSTANDING

Between

Citrus Levy Marion Regional Workforce Development Board, Inc.  
DBA CareerSource Citrus Levy Marion  
And  
The School Board of Marion County, Florida

## 1. Purpose of this Memorandum of Understanding

The Workforce Innovation and Opportunity Act (WIOA) requires that a Memorandum of Understanding (MOU) be developed and executed between the local Workforce Development Board, in this case, CareerSource Citrus Levy Marion (CSCLM) and the Career Center Partners. This Act requires specific programs to make their services available through a one-stop delivery system, and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSCLM and the One-Stop system partners to establish an agreement concerning the operations of the one-stop system and to establish the framework for providing services to employers, employees, job seekers and others needing workforce services. Furthermore, this mutual agreement details how each required partner will support and contribute to the overall infrastructure costs of the One-Stop system.

Florida's one-stop delivery system, the CareerSource Network, is a locally-driven system which develops strategic partnerships and provides streamlined and integrated programs and services to the businesses and citizens of Florida.

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

- A. 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.
- B. 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.
- C. 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.

These objectives will be accomplished locally by providing all customers access to high-quality career centers within a one-stop system that connects them with the full range of services available in their communities, whether they are customers seeking to find jobs, build basic

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educational or occupational skills, earn a postsecondary certificate or degree, or obtain guidance on how to make career choices, or are businesses and employers seeking skilled workers.

The purpose of this MOU is to establish or enhance a cooperative working relationship between CSCLM and The School Board of Marion County, Florida ("School Board") and to define our respective roles and responsibilities in achieving the policy objectives.

## 2. System Partners

MOUs will be developed with system partner programs that are provided physically within the center, provided through cross-training of partner staff, or provided through direct linkage from technology. The partner programs and targeted population programs available in CSCLM will be:

### **Locally Operated by CSCLM through agreement with Department of Economic Opportunity (DEO)**

- A. WIOA Title I Adult, Dislocated Worker and Youth\*
- B. WIOA Title III Wagner-Geyser\*
- C. Veterans Employment and Training\*
- D. Trade Act\*
- E. Unemployment\* (Primarily provided at State level)
- F. Temporary Assistance for Needy Families\*
- G. Supplemental Nutrition Act Program (SNAP)

### **Locally Operated by CSCLM through agreement with Department of Labor (DOL)**

- H. YouthBuild\*

### **MOU Provided at State Level**

- I. WIOA Title II Adult Education and Literacy\*
- J. WIOA Title IV Vocational Rehabilitation\*
- K. Carl Perkins Career and Technical Education\*

### **MOU with CSCLM**

- L. Title V Older Americans Act aka SSCEP\*
- M. Job Corps\*
- N. Community Action Agencies\*
- O. Housing Authorities\*
- P. Agencies serving individuals with disabilities
- Q. Agencies serving youth with barriers to employment
- R. Early Learning Coalitions
- S. Homeless Continuum of Care organizations
- T. Veteran Agencies
- U. Economic Development
- V. Support Service Providers
- W. Others as determined to be beneficial to serving both employers and job seekers.

\* denotes those that are "required" partners

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### 3. One-Stop System Description

As designated by CareerSource Florida on behalf of the Governor, CSCLM is the local workforce board and the regional planning area, under Title I of the WIOA. Currently CSCLM has been provided permission to provide and act as the One-Stop Operator and Career Services Provider.

The CSCLM area consists of the counties of Citrus, Levy and Marion with Career Centers located in Lecanto, Chiefland, and Ocala. The Ocala Career center located at 2703 NE 14<sup>th</sup> Street is the comprehensive center for CSCLM. A professional placement center is located at the College of Central Florida Campus in Ocala for specialized recruitment and placement of professionals throughout the region and in partnership with our training partners. CSCLM also has two mobile units to assist in providing services to remote and rural areas within the region.

All of our centers provide seamless access to workforce programs for both the job seeker and the employer. Our system is linked through Employ Florida, the State's talent matching system, to provide a system wide approach for job seeking and job placement.

Our centers provide access to a multitude of services that can be obtained through either self-service or with assistance from staff. By blending and weaving our various funding streams we are able to provide services to customers without pushing a customer from program to program, but handling in a customer driven manner based on individual strategies.

The One-Stop System is the result of the partnerships developed within our region that links the programs and services provided at the Career Centers and at other partner locations that provide the full complement of services needed by our customers.

This MOU will increase our ability to serve mutual customers, reduce duplication of efforts and expand our abilities to provide services throughout the One-Stop System either in one of our Career Centers, electronically at your location, or as an affiliate site.

### 4. General Responsibilities of One-Stop System Partners:

- A. The One-Stop System partner agrees to participate in joint planning, plan development, and modification of activities to result in:
  - I. Continuous partnership building;
  - II. Continuous planning responsive to State and Federal requirements;
  - III. Responsive to specific local and economic conditions including employer needs;
  - IV. Solutions to common data collection and reporting needs;
- B. Make available to customers through the One-Stop System the services that are applicable to the partners' programs
- C. Participate in the operation of the One-Stop System consistent with the agreed upon "service integration" following in the next part, number 5
- D. Participate in capacity building and staff development activities
- E. Insure that all partners and staff are cross-trained to understand programs and specific "service integration" goals as specified in the next part, number 5

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## **5. Service Integration Plan and Goals:**

CSCLM and School Board agree to the following:

This agreement establishes that the duly authorized agent of the recipient agrees to satisfy the requirements of 34 CFR 361.505 and 34 CFR 361.720.

This agreement formalizes the existing partnership between CSCLM and School Board to provide adult education and workforce services to our mutual customers. CSCLM and School Board recognize that blended services provided by all required and optional partners contributes to the One Stop 'system' and neither independently creates the 'system'. The combination of services provides employment and educational counseling and access to partner programs through direct referral and electronic access points within each office. CSCLM customers are counseled on all aspects of employment and education options available through educational entities and funding assistance provided through Titles I, II and IV funds under the WIOA. Appropriate referrals for intra-agency assistance are made between agencies through established contacts within each department and will be made in writing via e-mail between those contacts. School Board may refer training program completers and those customers in need of additional financial assistance to CSCLM for assessment and counseling regarding their individual needs.

Both agencies agree to maintain full programmatic accessibility and compliance with all applicable laws to ensure that individuals have equal ability to access available services as further discussed in sections 8 and 9 of this document. This access includes full ADA compliance, use of assistive technology and provision of accommodations that may be necessary for individuals with additional barriers.

This agreement exercises the DOL issued extension of the Infrastructure Funding Agreement (IFA) requirement until the established deadline of January 1, 2018. This extension is described in TEGL 17-16, section 14 issued on January 18, 2018. Both parties acknowledge and agree to the requirement of the IFA and are currently working with CSCLM's One Stop Operator to develop a mutually beneficial agreement that defines and monetizes each partner's proportional use of the One Stop 'system'. The completed IFA will be mutually agreed upon and will become an attachment to this document.

## **6. Resource and Cost Sharing**

This MOU between CSCLM and School Board is an agreement of service integration.

## **7. Data Access and Sharing**

To facilitate integration of services, partners are encouraged to provide cross-access or protected information from systems of customer data within the applicable federal and state privacy laws and regulations governing the partner programs. All state and federal confidentiality regulations regarding the creation, maintenance and/or use of records shall be in effect. Client records and/or information may be shared among partners subject to these confidentiality requirements. Data sharing arrangements will be included in section 5.

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**8. Access for Individuals with Barriers to Employment**

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**9. Non-Discrimination**

As required by federal and state law, participating agencies will assure that no person shall be discriminated against in consideration for or receipt of partner agency services and/or employment based upon sex, disability, race, color, age, religion, national origin, political affiliation, belief, veteran status, familial status, gender, or pregnancy.

The One-Stop system partner will assure compliance with the Americans with Disabilities Act of 1990, and its Amendments, which prohibits discrimination on the basis of disability, as well as applicable regulations and guidelines issued pursuant to the ADA.

Partners agree to comply fully with the WIOA, Title VII of the civil rights act of 1964, the Age Discrimination Act of 1975, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities, and The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and 29 CFR Part 37 and all other regulations implementing the aforementioned laws.

**10. Duration, Modification, and Termination of the Partner MOU**

It is mutually understood that this MOU shall not become effective until signed. This MOU shall remain in effect until the date below, or until it is modified, extended or terminated in accordance with this section. Regardless of duration, this MOU shall be reviewed every year. This MOU may be amended at any time in writing and will be effective when signed by both entities. Either party may cancel its participation in whole or in part at any time with thirty (30) days written notice. This MOU will be in effect until: June 30, 2020.

## 11. Public Records.

CSCLM understands the broad nature of these laws and agrees to comply with Florida's Public Records Laws relating to records retention.

A. To the extent that CSCLM meets the definition of "contractor" under § 119.0701, Fla. Stats. (2017), and in addition to other contract requirements provided by law, the CSCLM agrees that it is acting as a contractor on behalf of SCHOOL BOARD as provided under § 119.0701(a) and as such it will comply with Florida's Public Records Law. Specifically, CSCLM agrees that it will:

- i. Keep and maintain public records that ordinarily and necessarily would be required by SCHOOL BOARD in order to perform the services performed by CSCLM under contract;
- ii. Provide the public with access to such public records on request from SCHOOL BOARD'S custodian of public records;
- iii. Provide SCHOOL BOARD with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law;
- iv. Ensure the public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if CSCLM does not transfer the records to the public agency;
- v. Upon completion of the contract, transfer, at no cost, to SCHOOL BOARD all public records in possession of CSCLM or keep and maintain public records required by the public agency to perform the service. If CSCLM transfers all public records to the public agency upon completion of the contract, CSCLM shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If CSCLM keeps and maintains public records upon completion of the contract, CSCLM shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to SCHOOL BOARD, upon request from SCHOOL BOARD'S custodian of public records, in a format that is compatible with the information technology systems of the public agency.

**B. IF CSCLM HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO CSCLM'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF RECORDS AT: Public Relations and Communication Officer: Kevin Christian, APR, CPRC, at (352) 671-7555, [public.relations@marion.k12.fl.us](mailto:public.relations@marion.k12.fl.us) or in person at 420-A SE Alvarez Avenue, Ocala, Florida 34471.**

## 12. Infrastructure and Cost Sharing

All partners within the Citrus Levy Marion One-Stop system operate with lean budgets and have long standing relationships that have been established to braid and blend funding to maximize the impact of resources available to the citizens of our region. Due to this, the partners on this MOU are not currently co-located within the American Job Center, but provide support of its operations through in-kind contributions that have a positive monetary impact on the day to day operations and expand the breadth of services available. CSCLM and School Board agree that infrastructure support for proportionate benefit from the One-

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Stop system is provided in the following methods:

- A. Use of digital technology for shared customers to access online resources provided by CSCLM
- B. Provision of CSCLM outreach materials to the general public
- C. Educational support and counseling to CSCLM referred and enrolled students
- D. Access to classes in targeted occupations to enhance local talent pipeline
- E. Access to meeting space within the partner's facilities to meet with students to discuss CSCLM services and programmatic enrollment
  - I. Space usage provides expansion of services for CSCLM and reduces additional costs of itinerate space when needed
- F. Ongoing partnership for outreach and connection of Adult learners to the One-Stop system
- G. School Board will continue to permit the use of one modular unit and utilities for the CSCLM sponsored Forward March program at the Marion Technical College. Facility usage is estimated at \$31,000.00 per year.

**13. Signatures**

**Citrus Levy Marion Regional  
Workforce Development Board,  
Inc. d/b/a CareerSource Citrus  
Levy Marion**

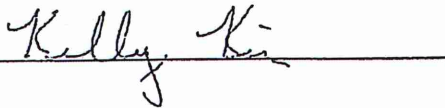
**The School Board of Marion County  
Florida**

By: 

Name: Thomas E. Skinner, Jr.

Title: Chief Executive Officer

Date: 10/25/2017

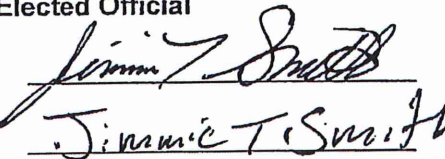
By: 

Name: Kelly King

Title: Board Chair

Date: OCT 24 2017

**Chief Elected Official**

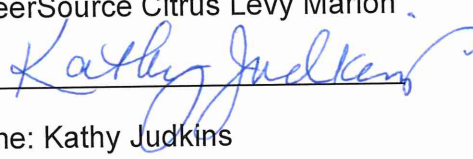
By: 

Name: Jimmie T. Smith

Title: Commissioner dist 3

Date: 10/31/17

**CareerSource Citrus Levy Marion**

By: 

Name: Kathy Judkins

Title: Board Chair

Date: 11/02/17

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# MEMORANDUM OF UNDERSTANDING

Between

Citrus Levy Marion Regional Workforce Development Board, Inc.  
DBA CareerSource Citrus Levy Marion

And

National Caucus and Center on Black Aging, Inc. (NCBA)

## 1. Purpose of this Memorandum of Understanding

The Workforce Innovation and Opportunity Act (WIOA) requires that a Memorandum of Understanding (MOU) be developed and executed between the local Workforce Development Board, in this case, CareerSource Citrus Levy Marion (CSCLM) and the Career Center Partners. This Act requires specific programs to make their services available through a one-stop delivery system, and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSCLM and the One-Stop system partners to establish an agreement concerning the operations of the one-stop system and to establish the framework for providing services to employers, employees, job seekers and others needing workforce services. Furthermore, this mutual agreement details how each required partner will support and contribute to the overall infrastructure costs of the One-Stop system.

Florida's one-stop delivery system, the CareerSource Network, is a locally-driven system which develops strategic partnerships and provides streamlined and integrated programs and services to the businesses and citizens of Florida.

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

- A. 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.
- B. 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.
- C. 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.

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These objectives will be accomplished locally by providing all customers access to high-quality career centers within a one-stop system that connects them with the full range of services available in their communities, whether they are customers seeking to find jobs, build basic educational or occupational skills, earn a postsecondary certificate or degree, or obtain guidance on how to make career choices, or are businesses and employers seeking skilled workers.

The purpose of this MOU is to establish or enhance a cooperative working relationship between CSCLM and NCBA to define our respective roles and responsibilities in achieving the policy objectives.

## 2. **System Partners**

MOUs will be developed with system partner programs that are provided physically within the center, provided through cross-training of partner staff, or provided through direct linkage from technology. The partner programs and targeted population programs available in CSCLM will be:

### **Locally Operated by CSCLM through agreement with DEO**

- A. WIOA Title I Adult, Dislocated Worker and Youth\*
- B. WIOA Title III Wagner-Peyser\*
- C. Veterans Employment and Training\*
- D. Trade Act\*
- E. Unemployment\* (Primarily provided at State level)
- F. Temporary Assistance for Needy Families\*
- G. Supplemental Nutrition Act Program (SNAP)

### **Locally Operated by CSCLM through agreement with DOL**

- H. YouthBuild\*

### **MOU Provided at State Level**

- I. WIOA Title II Adult Education and Literacy\*
- J. WIOA Title IV Vocational Rehabilitation\*
- K. Carl Perkins Career and Technical Education\*

### **MOU with CSCLM**

- L. Title V Older Americans Act aka SSCEP\*
- M. Job Corps\*
- N. Community Action Agencies\*
- O. Housing Authorities\*
- P. Agencies serving individuals with disabilities
- Q. Agencies serving youth with barriers to employment
- R. Early Learning Coalitions
- S. Homeless Continuum of Care organizations
- T. Veteran Agencies
- U. Economic Development

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- V. Support Service Providers
- W. Others as determined to be beneficial to serving both employers and job seekers.

\* denotes those that are "required" partners

### 3. One-Stop System Description

As designated by CareerSource Florida on behalf of the Governor, CSCLM is the local workforce board and the regional planning area, under Title I of the WIOA. Currently CSCLM has been provided permission to provide and act as the One-Stop Operator and Career Services Provider.

The CSCLM area consists of the counties of Citrus, Levy and Marion with Career Centers located in Lecanto, Chiefland, and Ocala. The Ocala Career center located at 2703 NE 14<sup>th</sup> Street is the comprehensive center for CSCLM. A professional placement center is located at the College of Central Florida Campus in Ocala for specialized recruitment and placement of professionals throughout the region and in partnership with our training partners. CSCLM also has two mobile units to assist in providing services to remote and rural areas within the region.

All of our centers provide seamless access to workforce programs for both the job seeker and the employer. Our system is linked through Employ Florida, the State's talent matching system, to provide a system wide approach for job seeking and job placement.

Our centers provide access to a multitude of services that can be obtained through either self-service or with assistance from staff. By blending and weaving our various funding streams we are able to provide services to customers without pushing a customer from program to program, but handling in a customer driven manner based on individual strategies.

The One-Stop System is the result of the partnerships developed within our region that links the programs and services provided at the Career Centers and at other partner locations that provide the full complement of services needed by our customers.

This MOU will increase our ability to serve mutual customers, reduce duplication of efforts and expand our abilities to provide services throughout the One-Stop System either in one of our Career Centers, electronically at your location, or as an affiliate site.

### 4. General Responsibilities of One-Stop System Partners:

- A. The One-Stop System partner agrees to participate in joint planning, plan development, and modification of activities to result in:
  - I. Continuous partnership building;
  - II. Continuous planning responsive to State and Federal requirements;
  - III. Responsive to specific local and economic conditions including employer needs;

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- IV. Solutions to common data collection and reporting needs;
- B. Make available to customers through the One-Stop System the services that are applicable to the partners' programs
- C. Participate in the operation of the One-Stop System consistent with the agreed upon "service integration" following in the next part, number 5
- D. Participate in capacity building and staff development activities
- E. Insure that all partners and staff are cross-trained to understand programs and specific "service integration" goals as specified in the next part, number 5

**5. Service Integration Plan and Goals:**

CSCLM and the National Caucus and Center on Black Aging, Inc. (NCBA) agree to the following:

This agreement establishes that the duly authorized agent of the recipient agrees to satisfy the requirements of 34 CFR 361.505 and 34 CFR 361.720.

This agreement formalizes the existing partnership between CSCLM and NCBA to provide employment and training services to our mutual customers. CSCLM and NCBA recognize that blended services provided by all required and optional partners contributes to the One Stop 'system' and neither independently creates the 'system'. The combination of services provides employment and educational counseling and access to partner programs through direct referral and electronic access points within each office. CSCLM customers are counseled on all aspects of employment and education options available through educational entities and funding assistance provided through Titles I, II and IV funds under the WIOA. Appropriate referrals for intra-agency assistance are made between agencies through established contacts within each department and will be made in writing via e-mail between those contacts. NCBA may refer training program completers and those customers in need of additional financial assistance to CSCLM for assessment and counseling regarding their individual needs.

Both agencies agree to maintain full programmatic accessibility and compliance with all applicable laws to ensure that individuals have equal ability to access available services as further discussed in sections 8 and 9 of this document. This access includes full ADA compliance, use of assistive technology and provision of accommodations that may be necessary for individuals with additional barriers.

**NCBA shall:**

1. Maintain and provide updated NCBA information to customers interested in CSCLM core services.
2. Provide NCBA program eligibility determination services to all customers interested in and possibly eligible for NCBA program services.
3. Accept and process customers referred by other CSCLM agencies/organizations to determine their eligibility for NCBA services. Referrals and customer-related information may be coordinated and/or forwarded directly or via electronic linkages.
4. Provide NCBA services to program-certified customers.
5. Participate in the development of a common application or pre-application format and/or procedure and a referral process to direct applicants to other One-Stop System agencies/organizations.
6. Ensure a CareersourceCLM.com email address is the primary email address for all staff located on a full time or itinerant basis in a CSCLM and/or One-Stop Delivery System office.

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7. List job openings through CSCLM. Refer customers demonstrating interests in and possibly eligible for agency/organization program services, as appropriate. Ensure all outreach efforts that include a reference to CSCLM receive prior approval from appropriate marketing staff.
8. Coordinate customer needs with CSCLM One-Stop System agencies/organizations to reduce or eliminate duplicated services and, whenever possible, to develop the best mix of services.
9. Ensure NCBA staff attend, participate in, and contribute to CSCLM One-Stop System cross training activities, as required.
10. Participate in the development and implementation of other One-Stop Center procedures, policies, reports, customer surveys, and operational agreements. Ensure employment placement information generated by NCBA is entered into state and local data collection systems. Actively participate in the development and maintenance of organizational reports that reflect the nature of NCBA's operations. Provide this information to the One-Stop Operator at least quarterly.
11. Support and cooperate with the CSCLM One-Stop Operator and other One-Stop System agencies, organizations to ensure all federal, state, and local laws, regulations, policies and procedures are applied to One-Stop System operations.
12. Ensure staff follow all applicable CSCLM policies as they relate to dress code, facility, operational and computer usage policies.

**CareerSource Citrus Levy Marion agrees to:**

1. Refer customers that may potentially be eligible for services provided by NCBA.
2. Provide career services to NCBA enrolled customers to assist in the development and placement of joint customers.
3. Provide the opportunity for NCBA employees to participate in CSCLM sponsored training and staff development.
4. Assist NCBA staff to attain performance goals through joint collaboration of services available through the One Stop system to meet the common employment and training goals of all involved parties.
5. Provide facility space for NCBA staff and volunteers when/where possible.

**6. Resource and Cost Sharing**

This MOU between CSCLM and NCBA is an agreement of service integration and in-kind contributions

**7. Data Access and Sharing**

To facilitate integration of services, partners are encouraged to provide cross-access or protected information from systems of customer data within the applicable federal and state privacy laws and regulations governing the partner programs. All state and federal confidentiality regulations regarding the creation, maintenance and/or use of records shall be in effect. Client records and/or information may be shared among partners subject to these confidentiality requirements. Data sharing arrangements will be included in section 5.

Client information shall be shared solely for the purpose of eligibility, enrollment, referral, or provision of services. In carrying out their respective responsibilities, each party shall respect and abide by the confidentiality policies of the other parties.

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## **8. Access for Individuals with Barriers to Employment**

All One-Stop system partners will ensure access for individuals with barriers to employment, and will offer priority for services to recipients of public assistance, other low-income individuals, or individuals who are basic skills deficient for individualized career services and training services funded with WIOA adult funds.

## **9. Non-Discrimination**

As required by federal and state law, participating agencies will assure that no person shall be discriminated against in consideration for or receipt of partner agency services and/or employment based upon sex, disability, race, color, age, religion, national origin, political affiliation, belief, veteran status, familial status, gender, or pregnancy.

The One-Stop system partner will assure compliance with the Americans with Disabilities Act of 1990, and its Amendments, which prohibits discrimination on the basis of disability, as well as applicable regulations and guidelines issued pursuant to the ADA.

Partners agree to comply fully with the WIOA, Title VII of the civil rights act of 1964, the Age Discrimination Act of 1975, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities, and The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and 29 CFR Part 37 and all other regulations implementing the aforementioned laws.

## **10. Duration, Modification, and Termination of the Partner MOU**

It is mutually understood that this MOU shall not become effective until signed. This MOU shall remain in effect until the date below, or until it is modified, extended or terminated in accordance with this section. Regardless of duration, this MOU shall be reviewed every year. This MOU may be amended at any time in writing and will be effective when signed by both entities. Either party may cancel its participation in whole or in part at any time with thirty (30) days written notice. This MOU will be in effect until: June 30, 2020.

## **11. Public Records.**

CSCLM and NCBA understand the broad nature of these laws and agree to comply with Florida's Public Records Laws relating to records retention.

A. To the extent that either CSCLM or NCBA meets the definition of "contractor" under § 119.0701, Fla. Stats. (2017), and in addition to other contract requirements provided by law, the CSCLM/NCBA agrees that it is acting as a contractor on behalf of the other as provided under § 119.0701(a) and as such it will comply with Florida's Public Records Law. Specifically, CSCLM and NCBA agree to:

- i. Keep and maintain public records that ordinarily and necessarily would be required by NCBA in order to perform the services performed by CSCLM under contract;

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- ii. Provide the public with access to such public records on request from NCBA's custodian of public records;
- iii. Provide NCBA with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law;
- iv. Ensure the public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if CSCLM does not transfer the records to the public agency;
- v. Upon completion of the contract, transfer, at no cost, to NCBA all public records in possession of CSCLM or keep and maintain public records required by the public agency to perform the service. If CSCLM transfers all public records to the public agency upon completion of the contract, CSCLM shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If CSCLM keeps and maintains public records upon completion of the contract, CSCLM shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to NCBA, upon request from NCBA's custodian of public records, in a format that is compatible with the information technology systems of the public agency.

**12. Infrastructure and Cost Sharing**

All partners within the Citrus Levy Marion One-Stop system operate with lean budgets and have long standing relationships that have been established to braid and blend funding to maximize the impact of resources available to the citizens of our region. Due to this, the partners agree upon in-kind contributions that have a positive monetary impact on the day to day operations and expand the breadth of services available. CSCLM and NCBA agree that infrastructure support for proportionate benefit from the One-Stop system is provided in the following methods:

- A. Provision of employment and training services to universal CareerSource Citrus Levy Marion customers.
- B. Provision of CSCLM outreach materials to the general public
- C. Educational support and counseling to CSCLM referred and enrolled individuals
- D. Ongoing partnership for outreach and connection of Adult learners to the One-Stop system
- E. Provision of additional staff support within CareerSource Citrus Levy Marion's career centers through provision of participating trainees to perform various tasks within the centers varying from general clerical to customer assistance in the resource area. This in-kind contribution supports the infrastructure of the One Stop system. This contribution is calculated as the following based on average participation of trainees within the career centers:

Program Contribution Per Participant (One Participant = 0.5 FTE)	2018 Rate	Hours	Weeks Per Year	Sub	7.65% Benefits (FICA 6.2%, Medicare \$1.45%)	Total
Participant 1	\$8.25	20	52	\$8,580.00	\$656.37	\$9,236.37
Participant 2	\$8.25	20	52	\$8,580.00	\$656.37	\$9,236.37
<b>Total NCBA Costs</b>						<b>\$18,482.74</b>

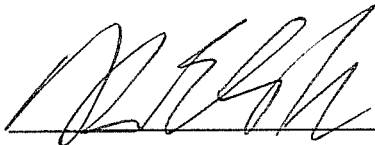
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13. Signatures

Citrus Levy Marion Regional  
Workforce Development Board,  
Inc. d/b/a CareerSource Citrus  
Levy Marion

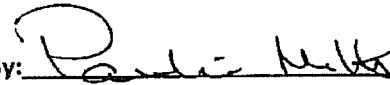
NCBA National Caucus and Center on  
Black Aging, Inc.

By: 

Name: Thomas E. Skinner, Jr.

Title: Chief Executive Officer

Date: 2-12-18

By: 

Name: Pauline Mills

Title: Program Manager - FL NCBA

Date: 2-13-18

# MEMORANDUM OF UNDERSTANDING

Between

Citrus Levy Marion Regional Workforce Development Board, Inc.  
DBA CareerSource Citrus Levy Marion  
And

Pinellas County Urban League (PCUL) - Urban Seniors Jobs  
Program (USJP)

## 1. Purpose of this Memorandum of Understanding

The Workforce Innovation and Opportunity Act (WIOA) requires that a Memorandum of Understanding (MOU) be developed and executed between the local Workforce Development Board, in this case, CareerSource Citrus Levy Marion (CSCLM) and the Career Center Partners. This Act requires specific programs to make their services available through a one-stop delivery system, and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSCLM and the One-Stop system partners to establish an agreement concerning the operations of the one-stop system and to establish the framework for providing services to employers, employees, job seekers and others needing workforce services.

Florida's one-stop delivery system, the CareerSource Network, is a locally-driven system which develops strategic partnerships and provides streamlined and integrated programs and services to the businesses and citizens of Florida.

Florida's strategic vision for WIOA implementation will be 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.

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These objectives will be accomplished locally by providing all customers access to high-quality career centers within a one-stop system that connects them with the full range of services available in their communities, whether they are customers seeking to find jobs, build basic educational or occupational skills, earn a postsecondary certificate or degree, or obtain guidance on how to make career choices, or are businesses and employers seeking skilled workers.

The purpose of this MOU is to establish or enhance a cooperative working relationship between CSCLM and Pinellas County Urban League (PCUL) - Urban Seniors Jobs Program (USJP) and to define our respective roles and responsibilities in achieving the policy objectives.

## 2. System Partners

MOUs will be developed with system partner programs that are provided physically within the center, provided through cross-training of partner staff, or provided through direct linkage from technology. The partner programs and targeted population programs available in CSCLM will be:

### **Locally Operated by CSCLM through agreement with DEO**

- WIOA Title I Adult, Dislocated Worker and Youth\*
- WIOA Title III Wagner-Peyser\*
- Veterans Employment and Training\*
- Trade Act\*
- Unemployment\* (Primarily provided at State level)
- Temporary Assistance for Needy Families\*
- Supplemental Nutrition Act Program (SNAP)

### **Locally Operated by CSCLM through agreement with DOL**

- YouthBuild\*

### **MOU Provided at State Level**

- WIOA Title II Adult Education and Literacy\*
- WIOA Title IV Vocational Rehabilitation\*
- Carl Perkins Career and Technical Education\*

### **MOU with CSCLM**

- Title V Older Americans Act aka SSCEP\*
- Job Corps\*
- Community Action Agencies\*
- Housing Authorities\*
- Agencies serving individuals with disabilities
- Agencies serving youth with barriers to employment
- Early Learning Coalitions

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- Homeless Continuum of Care organizations
  - Veteran Agencies
  - Economic Development
  - Support Service Providers
  - Others as determined to be beneficial to serving both employers and job seekers.
- \* denotes those that are "required" partners

### 3. One-Stop System Description

As designated by CareerSource Florida on behalf of the Governor, CSCLM is the local workforce board and the regional planning area, under Title I of the WIOA. Currently CSCLM has been provided permission to provide and act as the One-Stop Operator and Career Services Provider.

The CSCLM area consists of the counties of Citrus, Levy and Marion with Career Centers located in Lecanto, Chiefland, and Ocala. The Ocala Career center located at 2703 NE 14<sup>th</sup> Street is the comprehensive center for CSCLM. A professional placement center is located at the College of Central Florida Campus in Ocala for specialized recruitment and placement of professionals throughout the region and in partnership with our training partners. CSCLM also has two mobile units to assist in providing services to remote and rural areas within the region.

All of our centers provide seamless access to workforce programs for both the job seeker and the employer. Our system is linked through Employ Florida, the State's talent matching system, to provide a system wide approach for job seeking and job placement.

Our centers provide access to a multitude of services that can be obtained through either self-service or with assistance from staff. By blending and weaving our various funding streams we are able to provide services to customers without pushing a customer from program to program, but handling in a customer driven manner based on individual strategies.

The One-Stop System is the result of the partnerships developed within our region that links the programs and services provided at the Career Centers and at other partner locations that provide the full complement of services needed by our customers.

This MOU will increase our ability to serve mutual customers, reduce duplication of efforts and expand our abilities to provide services throughout the One-Stop System either in one of our Career Centers, electronically at your location, or as an affiliate site.

### 4. General Responsibilities of One-Stop System Partners:

- The One-Stop System partner agrees to participate in joint planning, plan development, and modification of activities to result in:

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- o Continuous partnership building;
- o Continuous planning responsive to State and Federal requirements;
- o Responsive to specific local and economic conditions including employer needs;
- o Solutions to common data collection and reporting needs;
- Make available to customers through the One-Stop System the services that are applicable to the partners programs
- Participate in the operation of the One-Stop System consistent with the agreed upon "service integration" following in the next part, number 5
- Participate in capacity building and staff development activities
- Insure that all partners and staff are cross-trained to understand programs and specific "service integration" goals as specified in the next part, number 5

## 5. Service Integration Plan and Goals:

CSCLM and Pinellas County Urban League (PCUL) - Urban Seniors Jobs Program (USJP)

agree to the following:

PCUL/USJP shall:

1. Maintain and provide updated PCUL/USJP information to customers interested in CSCLM core services.
2. Provide PCUL/USJP program eligibility determination services to all customers interested in and possibly eligible for PCUL/USJP program services.
3. Accept and process customers referred by other CSCLM agencies/organizations to determine their eligibility for PCUL/USJP services. Referrals and customer-related information may be coordinated and/or forwarded directly or via electronic linkages.
4. Provide PCUL/USJP services to program-certified customers.
5. Participate in the development of a common application or pre-application format and/or procedure and a referral process to direct applicants to other One-Stop System agencies/organizations.
6. Ensure a CareerSourceCLM.com email address is the primary email address for all staff located on a full time or itinerant basis in a CSCLM and/or One-Stop Delivery System office.
7. List job openings through CSCLM. Refer customers demonstrating interests in and possibly eligible for agency/organization program services, as appropriate. Ensure all outreach efforts that include a reference to CSCLM receive prior approval from appropriate marketing staff.
8. Coordinate customer needs with CSCLM One-Stop System agencies/organizations to reduce or eliminate duplicated services and, whenever possible, to develop the best mix of services.
9. Ensure PCUL/USJP staff attend, participate in, and contribute to CSCLM One-Stop System cross training activities, as required.
10. Participate in the development and implementation of other One-Stop Center procedures, policies, reports, customer surveys, and operational agreements. Ensure employment placement information generated by PCUL/USJP is entered into state and local data collection systems. Actively participate in the development and maintenance of organizational reports that reflect the nature of PCUL/USJP's operations. Provide this information to the One-Stop Operator at least quarterly.
11. Support and cooperate with the CSCLM One-Stop Operator and other One-Stop System agencies, organizations to ensure all federal, state, and local laws, regulations, policies and procedures are applied to One-Stop System operations.
12. Ensure staff follow all applicable CSCLM policies as they relate to dress code, facility, operational and computer usage policies.

CareerSource Citrus Levy Marion agrees to:

1. Provide facility usage for the PCUL/USJP staff as part of our partnership.
2. Provide access and use of the CSCLM computer network to PCUL/USJP staff for purposes of work conducted within the terms of this MOU.
3. Provide PCUL/USJP staff ongoing 'helpdesk' support when operating the CSCLM computer network.
3. Refer customers that may potentially be eligible for services provided by PCUL/USJP.
4. Provide career services to PCUL/USJP enrolled customers to assist in the development and placement of joint customers.
5. Provide the opportunity for PCUL/USJP employees to participate in CSCLM sponsored training and staff development.
6. Assist PCUL/USJP staff to attain performance goals through joint collaboration of services available through the One Stop system to meet the common employment and training goals of all involved parties.

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MOU

Page 4 of 6

**6. Resource and Cost Sharing**

This MOU between CSCLM and Pinellas County Urban League (PCUL) - Urban Seniors Jobs Program (USJP) is an agreement of service and facility collaboration.

**7. Data Access and Sharing**

To facilitate integration of services, partners are encouraged to provide cross-access or protected information from systems of customer data within the applicable federal and state privacy laws and regulations governing the partner programs. All state and federal confidentiality regulations regarding the creation, maintenance and/or use of records shall be in effect. Client records and/or information may be shared among partners subject to these confidentiality requirements. Data sharing arrangements will be included in section 5.

Client information shall be shared solely for the purpose of eligibility, enrollment, referral, or provision of services. In carrying out their respective responsibilities, each party shall respect and abide by the confidentiality policies of the other parties.

**8. Access for Individuals with Barriers to Employment**

All One-Stop system partners will ensure access for individuals with barriers to employment, and will offer priority for services to recipients of public assistance, other low-income individuals, or individuals who are basic skills deficient for individualized career services and training services funded with WIOA adult funds.

**9. Non-Discrimination**

As required by federal and state law, participating agencies will assure that no person shall be discriminated against in consideration for or receipt of partner agency services and/or employment based upon sex, disability, race, color, age, religion, national origin, political affiliation, belief, veteran status, familial status, sexual orientation, gender identity, pregnancy, or genetic information.

The One-Stop system partner will assure compliance with the Americans with Disabilities Act of 1990, and its Amendments, which prohibits discrimination on the basis of disability, as well as applicable regulations and guidelines issued pursuant to the ADA.

Partners agree to comply fully with the WIOA, Title VII of the civil rights act of 1964, the Age Discrimination Act of 1975, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities, and The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and

29 CFR Part 37 and all other regulations implementing the aforementioned laws.

**10. Duration, Modification, and Termination of the Partner MOU**


It is mutually understood that this MOU shall not become effective until signed. This MOU shall remain in effect until modified, extended or terminated in accordance with this section. However, this MOU shall be reviewed every two (2) years. This MOU may be amended at any time in writing and will be effective when signed by both entities.

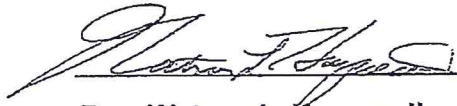
Either party may cancel its participation in whole or in part at any time with thirty (30) days written notice.

**11. Signatures**

Approved for Citrus Levy Marion  
Regional Workforce Development  
Board, Inc.:

Approved for: Pinellas County Urban League (PCUL)  
- Urban Seniors Jobs Program (USJP)

By:   
Name: Thomas E. Skinner, Jr.  
Title: Chief Executive Officer  
Date: 1-29-18

By:   
Name: Rev. Watson L. Haynes, II  
Title: President & CEO  
Date: 12/21/17

# MEMORANDUM OF UNDERSTANDING

## **ADDENDUM for Infrastructure Funding Agreement**

Between

Citrus Levy Marion Regional Workforce Development Board, Inc.

DBA CareerSource Citrus Levy Marion

And

Pinellas County Urban League (PCUL) – Urban Seniors Jobs

Program (USJP)

### **1. Purpose of this Addendum**

The Workforce Innovation and Opportunity Act (WIOA) requires that a Memorandum of Understanding (MOU) be developed and executed between the local Workforce Development Board, in this case, CareerSource Citrus Levy Marion (CSCLM) and the Career Center Partners. This Act requires specific programs to make their services available through a one-stop delivery system and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSCLM and the required One-Stop system partners to establish an agreement concerning the operations of the one-stop system and to establish a mutual agreement that details how each required partner will contribute to the overall infrastructure costs of the One-Stop system.

This document serves as an addendum to the previously signed MOU and details the contributions of each partner in regards to supporting the infrastructure of the system.

### **2. Infrastructure and Cost Sharing**

All partners within the Citrus Levy Marion One-Stop system operate with lean budgets and have long standing relationships that have been established to braid and blend funding to maximize the impact of resources available to the citizens of our region. The partners on this MOU are currently co-located within the American Job Center and provide support of its operations through in-kind contributions that have a positive monetary impact on the day to day operations and expand the breadth of services available. CSCLM and the partner as listed on the originating MOU agree that infrastructure support for proportionate benefit from the One-Stop system is provided in the following methods:

- A. Provision of employment and training services to universal CareerSource Citrus Levy Marion customers.
- B. Provision of CSCLM outreach materials to the general public
- C. Educational support and counseling to CSCLM referred and enrolled individuals
- D. Ongoing partnership for outreach and connection of Adult learners to the One-Stop system
- E. Provision of additional staff support within CareerSource Citrus Levy Marion's career centers through provision of participating trainees to perform various tasks within the centers varying from general clerical to customer assistance in the resource area. This in-kind contribution supports the infrastructure of the One Stop system. This contribution is calculated as the following based on average participation of trainees within the career centers:



Program Contribution Per Participant (One Participant = 0.5 FTE)	2018 Rate	Hours	Weeks Per Year	Sub	7.65% Benefits (FICA 6.2%, Medicare \$1.45%)	Total
Participant 1	\$8.25	20	52	\$8,580.00	\$656.37	\$9,236.37
Participant 2	\$8.25	20	52	\$8,580.00	\$656.37	\$9,236.37
<b>Total PCUL Foundation Costs</b>						<b>\$18,482.74</b>

**3. Duration, Modification, and Termination of the Partner MOU Addendum**

It is mutually understood that this Addendum will not become effective until signed. This Addendum will remain in effect until the date shown on the originating MOU and may be modified or terminated at any time by either party in accordance with the procedures outlined in the originating MOU. Infrastructure funding agreements will be reviewed annually and adjusted as agreed upon by both parties should changes occur.

**4. Signatures**

**Citrus Levy Marion Regional  
Workforce Development Board, Inc.  
d/b/a CareerSource Citrus Levy  
Marion**

**Pinellas Urban League/Urban Seniors Jobs  
Program**

By: \_\_\_\_\_

By: \_\_\_\_\_

Name **Thomas E. Skinner, Jr.**

Name: **Rev. Watson L. Haynes, II**

Title: **Chief Executive Officer**

Title: **President & CEO**

Date: \_\_\_\_\_

1-29-18

Date: \_\_\_\_\_

1-29-18

MEMORANDUM OF UNDERSTANDING  
NO.: IA-761  
BETWEEN  
CAREERSOURCE CITRUS LEVY MARION  
AND  
FLORIDA DEPARTMENT OF EDUCATION  
DIVISION OF VOCATIONAL REHABILITATION  
AMENDMENT NO. 1

Memorandum of Understanding (MOU) number IA-761, entered into by and between CareerSource Citrus Levy Marion ("CareerSource") and the Florida Department of Education, Division of Vocational Rehabilitation ("Partner") on August 19, 2016, is hereby amended as follows:

1. Section VII., Term, first paragraph, is hereby amended to now read:

This MOU is effective July 1, 2016 or date fully executed, through June 30, 2020 and may be renewed for successive one-year terms upon written concurrence between the parties. This MOU may be terminated for convenience at any time by either party upon thirty (30) days written notice.

2. Attachment I, Infrastructure Funding Agreement, including all attachments thereto, is hereby incorporated in its entirety.

All provisions in the MOU not in conflict with this Amendment remain in full force and effect and are to be performed at the level specified in the MOU.

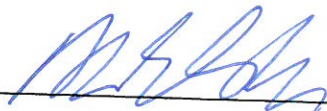
This Amendment and all its attachments are hereby made a part of the MOU.

This Amendment shall become effective as of the date of the final signatory below.

IN WITNESS WHEREOF, the Parties hereto have caused this Amendment to be executed by their proper and duly authorized representatives.

CAREERSOURCE CITRUS LEVY MARION

BY:

  
\_\_\_\_\_

DATE:

3/15/18  
\_\_\_\_\_

DEPARTMENT OF EDUCATION  
DIVISION OF VOCATIONAL REHABILITATION

BY:

  
\_\_\_\_\_  
Pam Stewart, Commissioner of Education

DATE:

4/3/18  
\_\_\_\_\_

**IA-761 A1 – ATTACHMENT I  
INFRASTRUCTURE FUNDING AGREEMENT  
FOR ONE-STOP CAREER CENTER SYSTEM  
BETWEEN THE DEPARTMENT OF EDUCATION AND  
CAREERSOURCE CITRUS LEVY MARION**

**I. PARTIES**

This Infrastructure Funding Agreement (“IFA”), is made pursuant to the Workforce Innovation and Opportunity Act of 2014 (“WIOA”), and is entered into by the Florida Department of Education, Division of Vocational Rehabilitation and Division of Blind Services (hereafter referred to as the Partners) and CareerSource Citrus Levy Marion (hereafter referred to as “CareerSource”).

**II. PURPOSE**

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

The purpose of this IFA is to describe the infrastructure cost responsibilities of the Parties to provide for the maintenance of effective and successful one-stop system. This agreement is intended to coordinate resources and to prevent duplication and ensure the effective and efficient delivery of workforce services in Citrus, Levy, and Marion counties.

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

**III. COST ALLOCATION METHODOLOGY**

CareerSource selected percentage of customer base served as the allocation basis to determine overall Partner contributions. This was done in an effort:

- a) To remedy the imbalance of non-physically represented Partners, and
- b) To comply with the requirement of Partners’ contributions having to be in proportion to the Partners’ use of the one-stop center(s) and relative benefit received.

**IV. PARTNER CONTRIBUTION AMOUNTS**

The following table details in-kind services that will be provided by each partner. The services provided have been identified as on-going costs to the One Stop system. The value of these contributions will be recognized to offset the overall infrastructure expenses of the system.

IFA Agency Budget/Contributions	
Partner	Contribution
Vocational Rehabilitation	Bi-Annual staff training for CareerSource staff
	Provision of marketing collateral to CareerSource
	Coordination/Partnership for employment and training initiatives for mutual customer base
	Provision of staff time for joint business outreach for general services and creation of On the Job training (OJT) and work experience opportunities for individuals with disabilities
	Ongoing consultation to CareerSource for program accessibility within the One Stop Centers
Division of Blind Services	Provision of meeting space as needed for intake and eligibility of referred Voc. Rehab customers
	Bi-Annual staff training for CareerSource staff
	Provision of marketing collateral to CareerSource
	Coordination/Partnership for employment and training initiatives for mutual customer base
	Provision of staff time for joint business outreach for general services and creation of On the Job training (OJT) and work experience opportunities for individuals with visual impairments
	Ongoing consultation to CareerSource for program accessibility within the One Stop Centers
	Provision of meeting space as needed for intake and eligibility of referred Blind Services customers
	Annual review and staff training for appropriate assistive technology located in CareerSource offices

**V. COST RECONCILIATION AND ALLOCATION BASE UPDATE**

All Parties agree that the services and contributions listed in section VI support the One Stop system and its infrastructure cost as a whole, but do not result in physical monetary exchange. All partners agree to meet annually to review and revise the contribution list as deemed necessary to ensure all partners contribute a proportionate share relative to the overall benefit of the system received.

1. Each partner will agree to an appropriate level of contribution through in-kind services provided to the One Stop system to support the above statement.

2. CareerSource will arrange an annual partners meeting to conduct a thorough review of the annual contributions and the MOU as a whole.
3. Partners will communicate any disputes with contribution to CareerSource. CareerSource will resolve any issues through re-negotiating services and costs. Re-negotiation of contributions may occur at any time through mutual agreement of revision of this MOU as described in section X.

#### **VI. STEPS UTILIZED TO REACH CONSENSUS**

The Partners and CareerSource conferred regarding the involvement of each partner at the CareerSource Centers. The appropriate allocation bases were discussed and those bases included in this IFA were agreed upon as the most appropriate. CareerSource proposed the initial Partner Contribution Amounts as described above and the Partners concurred with their proposal. Finally, the parties discussed the best mechanisms by which to review and reconcile actual expenses in the future and agreed to the term included in the Cost Reconciliation and Allocation Base Update section above.

#### **VII. DISPUTE AND IMPASSE RESOLUTION**

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

1. If an issue arises involving this IFA, both parties will make every effort to reach a resolution in a timely and efficient manner. Either partner may request a face-to-face meeting of the local partners to identify and discuss the issue. If resolved and no further action is deemed necessary by the partners, the issue and the resolution will be documented in writing.
2. If not resolved, the issue and the efforts to resolve will be documented and forwarded to the President/CEO of CareerSource and the Director of the Partner organization. A joint decision shall be issued within 60 calendar days of receipt.
3. If dissatisfied with the decision, the dispute may be filed with the State of Florida Department of Economic Opportunity (DEO) and the Commissioner of the Department of Education (DOE) to review concerns and determine resolution. DEO and DOE may remand the issue back to the President/CEO of CareerSource and to the Director of the Partner organization, Partner or impose other remedies to resolve the issue.

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

#### **VIII. MODIFICATION PROCESS**

This IFA may be amended or modified with review and consent of all parties. Amendments and modifications must be issued in writing to all parties and sent certified U. S. Mail. All parties 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.

#### **IX. EFFECTIVE PERIOD**

This IFA will become effective as of the date of signing by the final signatory below and must terminate on June 30, 2020.

**X. PAYMENT METHODOLOGY**

As described in Section V., each partner's contribution will be provided as in-kind services, therefore no payments will be made as a result of this IFA.

**SIGNATURES**

**Department of Education (Partner):**

**CareerSource Citrus Levy Marion:**

 9/10/14  
\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

Pam Stewart, Commissioner of Education

THOMAS E. SISKNER JR  
\_\_\_\_\_  
Printed Name

Date

Date

3/15/18

**MEMORANDUM OF AGREEMENT**

**BETWEEN**

**THE CITRUS, LEVY, MARION REGIONAL WORKFORCE DEVELOPMENT BOARD, INC.**

**AND**

**THE CITRUS, LEVY, MARION WORKFORCE DEVELOPMENT CONSORTIUM**

**THIS AGREEMENT** is made and entered into between the Citrus, Levy, Marion Regional Workforce Development Board, Inc., hereinafter referred to as the **CLMRWDB**, and the Citrus, Levy, Marion Workforce Development Consortium, hereinafter referred to as the **CLMWDC**, for the purpose of establishing a Workforce Development Partnership, as authorized and provided for under Public Law 113-128, enacted by the Congress of the United States, which act is known as the "Workforce Innovation and Opportunity Act (herein after referred to WIOA), and Florida Statutes (F.S.) Chapter 445, and for the purpose of establishing an integrated management and control structure for the provision of job training, job placement and related benefits service.

**WITNESSETH:**

**WHEREAS**, the receipt and expenditure of WIOA funds authorized for certain Workforce Development Programs within local Workforce Development Areas (WDA) are dependent upon the establishment of a partnership between business and government; and

**WHEREAS**, the Governor on the part of the State of Florida has designated the counties of Citrus, Levy and Marion as a WDA; and

**WHEREAS**, the Counties of the WDA each represented by an Elected Official appointed by the governing board, have formed the **CLMWDC** through adoption of an Amended Interlocal Agreement pursuant to Florida Statutes, Chapter 163.01 to carry out these local governments' responsibilities within their collective and respective boundaries for the purpose of Workforce Development; and

**WHEREAS**, the **CLMRWDB**, representing business by its private sector majority, has been duly appointed by the **CLMWDC**; and

**WHEREAS**, the **CLMRWDB** is empowered and has the responsibility under the WIOA to provide policy guidance for, and exercise oversight with respect to, activities under a Plan for the WDA in partnership with the **CLMWDC**; and

**WHEREAS**, the WIOA requires the **CLMRWDB** and the **CLMWDC** to define the scope of their partnership by means of an Agreement; and

**WHEREAS**, the U.S. Department of Labor, has encouraged the development of a workforce development system governed by local workforce investment boards; and

**WHEREAS**, the purpose of these local boards is to develop local workforce development policies and strategies; to oversee the management and administration of those policies and strategies; and to develop an approach which consolidates the delivery of those workforce development strategies into a comprehensive, customer-centered system at the local level in concert with the chief elected officials of the local governments; develop broad regional plans that promote economic development through a trained workforce; and

**WHEREAS**, within the WDA comprised of Citrus, Levy and Marion Counties, there currently exists an effective, efficient and highly successful delivery system of federally and state-funded employment and training programs which are not customer-centered; and

**WHEREAS**, the programs envisioned under the control of the local workforce development boards include, but are not limited to, those funded through the WIOA, the Wagner-Peyser Act, Perkins vocational training, school-to-work transition programs, vocational rehabilitation, Job Opportunity Basic Skills Program (JOBS), Welfare to Work (WTW), Supplemental Nutritional Assistance Program (SNAP), Re-Employment Services and other workforce development programs and services;

**NOW THEREFORE**, be it resolved that this Agreement be made and entered into by the **CLMRWDB** and **CLMWDC** pursuant to WIOA, and that the parties mutually agree as follows:

I. Authorities and Responsibilities Held Jointly by CLMRWDB and CLMWDC

A. It is the joint responsibility and responsibility of both parties to ensure effective service delivery to provide the most beneficial program services possible to the eligible residents of the WDA. It is further the shared



responsibility of all sectors of the community to participate in the provision of program services.

B. **CLMWDC** hereby designates CLMRWDB as the grant recipient and administrative entity for the WDA for the period July 1, 2020 through June 30, 2025.

C. **CLMRWDB** and **CLMWDC** shall jointly submit an approved local Workforce Development Plan to the Governor in accordance with the provisions of the WIOA and other applicable laws. CLMRWDB shall develop, in concert with other workforce investment boards within the workforce development region prescribed by the Governor, and present to the CLMWDC, a regional workforce development plan in accordance with Section 106 (c) of WIOA, to be approved and forwarded to the Governor.

D. **CLMRWDB** and **CLMWDC** shall decide the allocation of funds for the Workforce Development Plan's Budget.

E. **CLMRWDB** and **CLMWDC** shall jointly select and approve of the One Stop Operator.

F. Because the WIA indicates that a partnership exists that requires mutual agreement on certain matters, any disputes between the partners to this Agreement shall be resolved by a mutually satisfactory negotiation. It is understood that in accordance with the WIA, the failure to resolve any dispute to the mutual satisfaction of both parties regarding the WFR's make-up, submission of the Workforce Development Plan, designation of an administrative entity and grant recipient, or **CLMRWDB's** make-up shall result in the forwarding of the unresolved matter to the Governor of the State of Florida for resolution.

## II. Authorities and Responsibilities of the CLMRWDB

**CLMRWDB** shall:

A. Develop, review and approve the Workforce Development Plan for the WDA and the Regional Plan (WIOA, 106 (c));

B. Provide policy guidance in the development of Workforce Development activities and for the provision of services;

C. Provide oversight of Workforce Development programs, activities

and services conducted under the Workforce Development Plan;

D. Solicit the input and participation of the local business community in the development and provision of program services to eligible residents of the WDA;

E. Develop By-Laws to determine its operation;

F. Have the authority to:

1. Develop and approve a budget for itself within the parameters established in the Workforce Development Plan's provisions and WIOA Budget contained therein;

2. Select and hire a staff; and, establish criteria for its chief executive to be approved by CLMWDC;

3. Develop and prepare five year local and regional Workforce Development Plans for approval by the **CLMRWDB** and by the **CLMWDC**;

4. Provide staff support to the **CLMWDC**;

5. Collect data necessary for management and evaluation and the preparation of required and desired reports;

6. Exercise oversight with respect to activities under the Workforce Development Plan;

8. Arrange for service delivery through non-financial agreements; and contracts.

9. Procure all goods, services and property, including the maintenance and inventorying thereof, necessary for its proper operation;

10. Procure annual audits of funds and resolve any questions arising therefrom and provide copies of same, as well as an audited financial statement, to the **CLMWDC** annually;

11. Develop and maintain procedures to hear and resolve grievances;

12. Perform such other duties as are necessary to fulfill its obligations and responsibilities under this Agreement and applicable Federal and State laws, rules, policies and plans;

13. Procure director's and officer's and other liability insurance on behalf of itself and the **CLMWDC** to the extent that such insurance is available, budgetarily feasible, and allowable as an expense;

14. Provide quarterly reports to the **CLMWDC**; and

15. Remove **CLMRWDB** members for cause per procedures established by the **CLMWDC**; and

### III. Authorities and Responsibilities of the CLMWDC

The **CLMWDC** shall:

A. Review and approve the Workforce Development Plans for the WDA and Regional Programs;

B. Provide public policy guidance in the development of job training activities and provision of services under the Workforce Development Plan;

C. Establish the **CLMRWDB**, appoint members to the **CLMRWDB** if such authority is delegated to individual **CLMWDC** members by their respective county commissions (absent such delegation the power to appoint **CLMRWDB** members from any of the three counties shall reside in the respective County commissions and the power to appoint area representatives shall reside in the three county commissions or in their respective **CLMWDC** representatives authorized to appoint members, if any) and maintain the make-up of the **CLMRWDB** in compliance with the requirements of the WIOA, F. S., Chapter 445 and other applicable laws on a continuous basis, all in accordance with the agreement which created the **CLMRWDB**; and

D. Suggest such changes in the organization, composition and management of the **CLMRWDB** or shall be desirable to best meet the needs of the citizens of the counties within the WDA.

### IV. Term of Agreement

This Agreement shall become effective July 1, 2020 and shall continue in effect until June 30, 2025. Thereafter, this Agreement may be renewed by a further

writing between the parties.

V. Merger

It is understood and agreed that the entire Agreement between the parties is contained herein and that this Agreement supersedes all oral agreements and negotiations between the parties relating to the subject matter hereof. All items and other agreements referred to in this Agreement are incorporated herein by reference, and are deemed to be part of this Agreement. This Agreement replaces all prior Agreements between the parties as to the subject matter hereof as of the effective date of this Agreement.

VI. Amendment

Either party to this Agreement may propose to amend or modify the terms of this Agreement consistent with applicable Federal and State laws, Federal Regulations and State requirements, by providing to the other party sixty (60) days written notice of any proposed amendments. Any and all modifications or amendments to this Agreement are subject to the approval of both the **CLMRWDB** and **CLMWDC**.

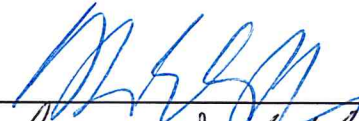
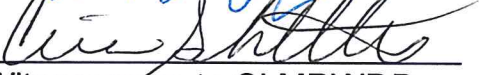
VII. Independence of Terms Under This Agreement

If any terms or provisions of this Agreement or the application thereof to any person or circumstance shall, to any extent be held invalid or unenforceable, the remainder of this Agreement, or the application of such term or provision to such person or circumstances other than those as to which it is held invalid or unenforceable, shall not be affected thereby and every other term and provision of this Agreement shall be valid and enforced to the fullest extent permitted by law.

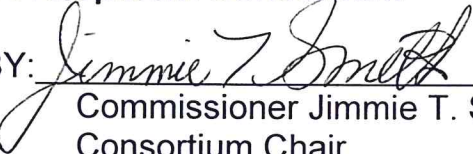
**IN WITNESS WHEREOF**, the parties hereto have executed this Agreement on the 4<sup>th</sup> day of March, 2020, and hereby agree to be bound by the terms and provision set forth herein effective July 1, 2020.



**Citrus, Levy, Marion Regional Workforce  
Development Board, Inc.**

BY:   
Rachel Riley, Chair

  
  
Witnesses as to CLMRWDB

**Citrus, Levy Marion Workforce  
Development Consortium**

BY:   
Commissioner Jimmie T. Smith,  
Consortium Chair

  
  
Witnesses to CLMWDC

**BY-LAWS OF THE CITRUS LEVY MARION REGIONAL WORKFORCE  
DEVELOPMENT BOARD, INC. (CLMRWDB)**

**A FLORIDA CORPORATION, NOT FOR PROFIT**

**THESE BY-LAWS ARE AMENDED AS APPROVED ON  
3/11/2020**

**ARTICLE I: NAME, OFFICE AUTHORITY, AND RESPONSIBILITIES:**

Section A: The name of the Corporation shall be the Citrus Levy Marion Regional Workforce Development Board, Inc. hereinafter referred to as “the CLMRWDB”.

Section B: The Principal office of the CLMRWDB shall be located at 3003 SW College Rd, Suite 205, Ocala, FL 34474. The CLMRWDB may have such other offices as the Board of Directors may designate or as the business of the CLMRWDB may require from time to time.

Section C: The registered office of the CLMRWDB, required by Florida Corporation Laws to be maintained in the State of Florida may be, but need not be, identical with principal offices in the State of Florida. The registered office of the CLMRWDB shall be in care of Robert A. Stermer, 7480 SW Highway 200, Ocala, FL 34476. The address of the registered office may be changed from time to time by the CLMRWDB.

Section D: The CLMRWDB exists as a result of the passage of the Workforce Innovation and Opportunity Act, Public Law 113-128, the Interlocal Agreement establishing the Citrus Levy Marion Workforce Development Consortium (“Consortium”), the Memorandum of Agreement between itself and the Consortium, and the Articles of Incorporation of the CLMRWDB. As such, CLMRWDB has been determined to be a Special District of the State of Florida, a unit of state government, and has all the rights granted by such status including, but not limited to, sovereign immunity.

Section E: The CLMRWDB shall have those duties and responsibilities provided for by the WIOA, other related laws of the United States, Florida Statutes (F.S.) Chapter 445, and other applicable laws, rules and policies of the State of Florida, its Articles of Incorporation and any agreements or contracts it may enter into with any third party and such other duties as are consistent with its non-profit status and with the provision of job training, job placement and benefit services to the citizens of Citrus, Levy and Marion Counties, Florida and its status as a unit of state government.

Section F: The CLMRWDB shall actively participate in the development of policies and programs for planning and implementing the activities of the Workforce Development Plan for Workforce Area Ten (Area 10).

Section G: The CLMRWDB shall maintain with the Consortium that relationship specified in the Memorandum of Agreement (“Memorandum”) between the two bodies.

## **ARTICLE II: COMPOSITION OF MEMBERSHIP; LENGTH OF SERVICE; ATTENDANCE ON THE CLMRWDB:**

Section A: The CLMRWDB shall be comprised of not more than thirty-three (33) members who are appointed as set forth in the Agreement to Establish the CLMRWDB. A member may represent more than one federally-mandated membership category. The number of the members on the CLMRWDB shall be determined by the Consortium. CLMRWDB membership shall be maintained pursuant to the Memorandum provisions.

Replacement of members who resign voluntarily, who are asked to resign or are removed because of unsatisfactory attendance records or other justifiable reason(s) will be in accordance with the Memorandum and any procedures required by the State of Florida or the United States Government.

Section B: It shall be the policy of the CLMRWDB that three (3) absences annually from regularly scheduled CLMRWDB Board or Committee meetings shall constitute just cause for recommendation for removal. A recommendation for removal shall only be made after review by the Executive Committee of the circumstances surrounding the absences. The following procedures shall be followed: The Executive Committee shall meet, discuss the circumstances, and make their determination to remove or not remove the member(s). In the event removal is recommended, the Executive Committee shall make a recommendation for removal of the member(s) to the CLMRWDB at its next meeting. A majority vote of those CLMRWDB members present shall be required for removal. Upon removal, the Consortium will be notified and seek nominations to replace that member.

Section C: The Consortium will be notified of member attendance annually and any members with three (3) unexcused absences or other justifiable reasons for removal and of any action taken by the CLMRWDB. The Consortium may, at its discretion, remove any member. It shall immediately seek nominations for a replacement.

Section D: Any member who no longer meets the criteria under which appointed to the CLMRWDB shall notify the Executive Committee in writing within 30 days of that status change, i.e., a private sector representative no longer owns his/her own business, retires from that business, or is no longer an officer, chief executive or chief operating officer of the business concerns under which he/she was appointed to the board. The Executive Committee will review all status changes and make a recommendation to the CLMRWDB. The CLMRWDB shall recommend to the Consortium that any member whose status has changed so as to affect the member's eligibility for continued membership be replaced on the CLMRWDB.

Section E: Board Member Nominations and Selection Process:

Board membership requirements, are detailed in both WIOA and in Florida



## Statutes, Section 445

For private sector business representation, nominations must be made by general purpose business organizations. These include chambers of commerce, economic development agencies and business groups such as the Mid-Florida Regional Manufacturers Association (MRMA). Those nominations are provided to the Local Elected official (LEO) for consideration and selection.

Public sector membership will generally be “agency based” and therefore requests for nominees are directed to the agency head for either self - nomination or a designee. These nominations will be submitted to the Consortium for selection.

### Recruitment:

Private sector membership is “balanced” by county whenever possible. Letters will be sent to key business organizations in each county soliciting nominations. CLMRWDB members from the county where a vacancy will occur/has occurred will be asked to contact business leaders in their county (in targeted membership sector), explain our Board’s duties as a follow to the letters.

### Board member must be:

- Owners
- Key executives; or
- Top-level policy executives

### Nomination Process:

- As part of the recruitment/nomination process:
- A nomination form will be completed by each nominee. The form will be transmitted to the CLMRWDB CEO or COO who will submit

he form for nomination to the Consortium for consideration and selection.

- If the CLMRWDB board member is working with their county's EDC or a Chamber as part of the recruitment process, that organization should be asked to send an email to the CLMRWDB CEO nominating the prospective member.

Nominations of prospective members will be compiled by the CLM staff and prepared for consideration by the LEO Consortium at its next scheduled meeting. Nominations will be grouped by vacancy.

Appointment Process:

After selection/appointment by the LEO Consortium, staff will:

1. Advise the board members of the selection;
2. Prepare a letter of welcome to be signed by the Chair that will include:
  - a. Information of the next Board meeting, including an invitation to the New Member Reception that will be scheduled one hour prior to the meeting.
  - b. Information of electronic access to the Board – Member Orientation
  - c. Financial Disclosure Form 1 (including information on time-frame for filing and contacts for assistance, if needed;
  - d. Hard copy of a Board Member Handbook
    - i. Committee information for committee selection

New members will be asked to review the electronic Orientation prior to the New Member Reception so that any questions can be answered at that time or they can contact staff prior to the Reception if they desire.

### **ARTICLE III: OFFICERS AND THEIR DUTIES:**

Section A: General:

The officers of the CLMRWDB shall be the Chair, Vice-Chair and Treasurer. The Vice-Chair and Treasurer shall be elected every two years. The Vice-Chair shall ascend to the office of Chair every two years and shall replace the outgoing Chair. The new Vice-Chair shall be elected from among the business and industry (private sector) representatives and shall rotate among the three counties' representatives every two years. The Treasurer shall be elected from the CLMRWDB public sector representatives. Treasurer shall not be eligible to ascend to the position of Chair because of the requirement that the Chair be a private sector representative. Officers shall serve two year terms.

The Executive Assistant to the Chief Executive Officer shall serve as the Secretary to the Board and have the responsibilities of maintaining minutes of the actions of the Board and other such duties that support the Board.

#### Removal of Officer(s):

Any officer of the Board may be removed with or without cause by an affirmative vote of a majority of the Board of Directors at a called meeting in which a quorum is present. A motion to remove an officer may be made by any board member.

#### Section B: Chair:

The Chair shall have the responsibility of presiding over CLMRWDB meetings, authority for appointing Committee membership and the Chair for each Committee subject to approval by the Executive Committee. The Chair shall serve as an ex-officio member of all Operational and Ad Hoc Committees, but will not be assigned to any Committee other than the Executive Committee.

#### Section C: Vice-Chair:

The Vice-Chair shall preside over the CLMRWDB meetings in the absence of or at the request of the Chair. The Vice-Chair shall also serve as an ex-officio member of all Operational and Ad Hoc Committees, but will not be assigned to any Committee other than the Executive.

Section D: The Treasurer or designee shall receive and deposit all funds in the name of the CLMRWDB in a bank approved by the Board. All checks shall be signed by either the Chief Executive Officer or Chief Operating Officer. Current financial records shall be kept at all times and reports on the financial status of the CLMRWDB shall be submitted at all meetings of the Board and membership, with copies to be attached to original minutes. The Treasurer shall chair the Audit Committee of the Board.

#### **ARTICLE IV: MEETINGS OF THE CLMRWDB:**

Section A: Regular Meetings:

The CLMRWDB shall meet quarterly or as determined by the Executive Committee and/or the CLMRWDB from meeting to meeting. All members of the CLMRWDB shall be notified in writing of the date, time, and place of the meetings at least five (5) days in advance. An agenda will be transmitted whenever possible.

Section B: Called Meetings:

The Chair may convene the Board at times other than the regular meetings, provided the CLMRWDB members are notified in writing at least five (5) days in advance of the date, time, and place of the meeting. An agenda will be transmitted with this notification. If the Chair determines that an emergency situation necessitates that a special meeting be called, the requirements for notice may be waived.

Section C: Quorum of Meetings:

A quorum for all meetings of the CLMRWDB shall be declared when one-

third (1/3) of the voting members are present. Once a quorum is declared at any CLMRWDB meeting, the quorum is not lost until the meeting is adjourned.

Section D: Decision on Questions:

The decision on all questions with the exception of amendments to the By-Laws provided for under ARTICLE VIII, shall be determined by a majority vote of the members voting on the question.

Section E: Waiver of Notice:

Whenever, under the laws of the State of Florida, or provisions of these By-laws, a waiver in writing is signed by persons entitled to such notice, whether before or after the time stated therein, it shall be deemed equivalent to the giving of such notice.

Section F: Robert's Rules of Order:

In matters not covered by these By-laws, Robert's Rules of Order, Revised (latest edition), shall govern the procedure of the meetings of the CLMRWDB and its Committees.

Section G: Proxy Voting:

To ensure meaningful discussion and determinations, vote by proxy will not be accepted.

Section H: Use of Technology:

Understanding the business requirements of Board members, CLMRWDB may use any form of technology to conduct the business of its committees and board meetings. If used, the technology must be accessible to the public for attendance. The use of such technology should be included on all meeting notices when used.

## Section I: Engagement of Stakeholders

CLMRWDB shall work to ensure engagement by the workforce system's stakeholders and employers by developing a list of Interested Parties. This list will include key business organizations and other groups, such as local SHRM organizations, and community groups that express an interest in workforce activities or services.

Notices of all meetings and agendas will be made available to those on the Interested Parties list. In addition, social media will be used to notify persons and organizations of the meetings of the Board and its committees.

At each meeting of the committees or Board a time for public comment and input will be placed on the agenda, and at the discretion of the Chair of the Board or committee, public input may be sought on any item coming before the body.

## **ARTICLE V: COMMITTEES OF THE CLMRWDB:**

Section A: The CLMRWDB may establish such Operational Committees as are deemed necessary to perform the specific functions of the CLMRWDB. These Committees shall be advisory to the CLMRWDB, except that they may, with specific authorization, act on behalf of the CLMRWDB. The following will be the Committees of the CLMRWDB:

### **Executive Committee:**

This Committee shall be comprised of the Chair, Vice-Chair and Treasurer of the CLMRWDB, the immediate past Chair of the CLMRWDB, and the Chairs of the, four Operational Committees, for a total of eight (8) members, at least two (2) members shall be selected from among the private sector representatives. This Committee shall be responsible for administrative matters of the CLMRWDB, shall

serve as the CLMRWDB finance and personnel committee, and as such, shall handle all finance and personnel matters, if any; shall be responsible for all issues, duties and responsibilities dedicated to and by vote of the full CLMRWDB, shall be authorized to act on an emergency basis on behalf of the full CLMRWDB between CLMRWDB meetings, shall recommend and approve formal procurement actions, and shall serve as the grievance/protest committee for all procurement actions.

The following ad hoc committees shall report to the Executive Committee: Audit; Member Recruitment; and, Nominating.

**Operational Committees:**

CLMRWDB shall have committees aligned with its goals, objectives and management needs. These include: Marketing Outreach and Community Relations; Career Center Services; Performance and Monitoring; and Business and Economic Development

**Marketing Outreach and Community Relations:**

The Marketing Outreach and Community Relations Committee shall plan and oversee the staff and Board efforts to improve the community awareness of Workforce; establish partnerships with community organizations that have missions similar to or supportive of the goals of the Board; inform the business community and the larger resident community of the region on the services and benefits available through the local workforce system; and, approve the staff marketing and outreach plan to business and applicant customers. It shall oversee the recruitment and orientation of new board members and strengthen board member engagement.

**Career Center:**

The Career Center Committee shall provide oversight and input regarding the services offered to both business and applicant customers; the development of partnerships to improve the efficiency and effectiveness of services and otherwise review and plan the partnerships, staffing and services offered through the local one stop system.

**Performance and Monitoring:**

The Performance and Monitoring Committee is charged with reviewing the performance of our one stop system and contractors against established goals. Additionally, it is charged with receiving and reviewing all internal monitoring, programmatic and fiscal as well as similar monitoring performed by the State. The Committee is also charged with establishing performance goals for the system and reviewing performance comparisons with other workforce boards based upon state performance reports and metrics.

**Business and Economic Development:**

The Business and Economic Development Committee is charged with aligning the resources of Workforce Connection with the economic development efforts of the three counties. It is also charged with reviewing staff and economic development coordination and collaborative efforts at business outreach and development. The Committee will serve to plan and coordinate the development of career paths, training and other services to support the needs of the business sectors targeted by the Board. It is responsible for the review and approval of demand occupations within the workforce area and, where feasible, coordinate with other workforce areas to develop regional strategies to serve these targeted sectors and provide coordinated workforce services.

Section B: The Chair of the CLMRWDB shall have authority to appoint members of the CLMRWDB to serve on all Operational Committees subject to the approval of the Executive Committee. Membership on all Operational



Committees shall be for one year. Members of the CLMRWDB who are also employees of public sector organizations may delegate other employees of the public sector organization to attend Committee meetings and cast advisory votes. The preceding sentence shall not apply to meetings of the Executive Committee.

In accordance with the above, representatives from key partners not appointed to CLMRWDB will be asked to serve on committees. These partners include, but are not limited to the following: School boards, economic development; private and public higher educational partners; trade associations, social and customer-focused agencies and, organized labor.

The Chair may appoint such other members to the Operational Committees as is necessary to gain broad industry input into the deliberations of the committees. Such members shall be ex-officio and have voting privileges.

Section C: Ad Hoc Committees:

Ad Hoc Committees may be established by the Chair autonomously to deal with matters of particular or immediate concern. Ad Hoc Committees shall be composed of members of the CLMRWDB with their number and representation determined by the Chair subject to approval by the Executive Committee. An Ad Hoc Committee shall be advisory to the CLMRWDB and shall terminate upon satisfactory completion of the task for which it was originally appointed. Non-CLMRWDB members may serve as voting members of Ad-hoc Committees.

Section D: Special Committees:

Nominating Committee:

The Committee shall be composed of members of the CLMRWDB,

appointed by the Chair with appropriate representation from each County of the Area 10. The Committee will meet every other year by the end of May, so that the Committee shall have sufficient time to bring forth a slate of nominees for Vice-Chair and Treasurer to be considered at the June meeting of the CLMRWDB. Should any Officer not be able to complete the officer's term of office, the most recently appointed Nominating Committee shall be convened to draw up a slate of nominees for filling the vacancy or vacancies except in the case of a vacancy in the Chair in which case the Vice-Chair shall ascend to the office of Chair. Nominations to fill such other vacancies shall be presented to the CLMRWDB for election as soon as possible following the occurrence of the vacancy or vacancies. Those officers selected by CLMRWDB, shall be recommended for selection by the Consortium

Audit:

The Audit Committee shall be chaired by the Treasurer and assume responsibility for recommending the selection of the Board's audit firm; and reviewing each annual audit prior to presentation to the Board.

Section E: Quorum:

A quorum for all Committee meetings of the CLMRWDB shall be declared when one-third (1/3) of the members are present. Once a quorum is declared at any CLMRWDB meeting, the quorum is not lost until the meeting is adjourned.

Section F: Chair for Operational Committees and Ad Hoc Committees:

The Chair of the CLMRWDB shall appoint the Chair for Operational Committees and Youth Council and of any Ad Hoc Committees subject to the approval of the Executive Committee.

Section G: Appointment of Committee Vice-Chairs:

The Chair for any Operational Committees or of an Ad Hoc Committee may appoint the Committee Vice-Chair from among the other members of the Committee.

Section H: Replacement of Committee Members:

The Chair of the CLMRWDB may replace any Committee member, after consultation with the committee member, and after considering the recommendations of the Chair of the Committee and subject to the approval of the Executive Committee.

#### **ARTICLE VI: RIGHTS OF MEMBERS TO MOTION, SECOND AND VOTE:**

Section A: All members of the CLMRWDB, including Committee Vice-Chairs presiding over Committee meetings, shall have the right to make and second motions, discuss and vote on any matter, notwithstanding the provisions of ARTICLE VIII, that is in order for CLMRWDB or Committee consideration, excepting that the CLMRWDB Chair when presiding over meetings of the CLMRWDB, shall only have the rights of discussion and of voting to break a tie vote of the CLMRWDB.

#### **ARTICLE VII: CONFLICT OF INTEREST:**

Section A: The CLMRWDB shall not, either directly or indirectly purchase, rent, or lease any realty, goods or services from any business entity of which any CLMRWDB member, the member's spouse or child is an officer, partner, director, or proprietor or in which they have any material interest.

Section B: There is hereby declared to be an exemption from Section "A" hereof, in accordance with Section 112.313(12) Florida Statutes, 1995, if:

- a. The business with the CLMRWDB is transacted under a rotation system whereby the business transactions are rotated among all qualified suppliers of the goods and services within the Workforce Area 10 service delivery area;

- b. The business is awarded under a system of sealed competitive bidding to the lowest or best bidder;
- c. The CLMRWDB member, the member's spouse or child, has in no way participated in the determination of the bid specifications or the determination of the lowest or best bidder;
- d. The CLMRWDB member, the member's spouse or child, has in no way used or attempted to use their influence to persuade the CLMRWDB or any personnel thereof to enter into such a contract other than by the mere submission of the bid; and
- e. The CLMRWDB member, prior to or at the time of the submission of the bid, has filed Contractor Disclosure Form and Conflict of Interest Forms disclosing the member's interest, or the interest of the member's spouse or child, and the nature of the intended business; and
- f. If CLMRWDB enters into a contract with an organization or individual represented on the Board of Directors, the contract must be approved by a 2/3 vote of the quorum of the Board, with the benefiting member abstaining from the vote (Florida Statutes 445.007(1)).
- g. If any other exemption created under Section 112.313(12) Florida Statutes or any other applicable Florida or United States statutes applies.

#### **ARTICLE VIII: AMENDMENTS:**

Section A: These By-laws may be amended or repealed by a two-thirds (2/3) vote of the CLMRWDB members voting on the question provided notice of the Amendment or request for repeal has been transmitted to members at least five (5) days in advance of the meeting in which the vote is to be taken.

## **ARTICLE IX: EXEMPT ACTIVITIES:**

Section A: Notwithstanding any other provisions of these By-laws, no Member, Director, Officer, Employee or Representative of this Corporation shall take any action or carry on any activities by or on behalf of the Corporation, not permitted to be taken or carried on by an organization exempt under Section 501(c)(3) of the Internal Revenue Code and its regulations as they now exist or may hereafter be amended or by an organization, contributions to which are deductible under Section 170(c)(2) of such code and regulations as they now exist or as they may hereafter be amended.

## **ARTICLE X: INDEMNIFICATION BY CORPORATION:**

Section A: Every Person who is or shall be or shall have been a Member or an Officer of the CLMRWDB and that person's Personal Representative shall be indemnified by the CLMRWDB against all costs and expenses reasonably incurred by or imposed upon that person in connection with or resulting from any actions, suit, or proceeding to which that person may be made a party by reason of being or having been a Member or Officer of the CLMRWDB, or of any subsidiary or affiliate thereof, except in relation to such matters as to which that person shall finally be adjudicated in such action, suit or proceeding to have acted in bad faith and to have been liable by a reason of willfulness of conduct in the performance of his duty as such Member or Officer. "Costs and Expenses" shall include, but without limiting the generality thereof, attorney's fees, damages and reasonable amounts paid in settlement.

## **ARTICLE XI: CODE OF CONDUCT AND ETHICS:**

A. CLMRWDB's Officers, Members, Employees or Agents shall not solicit gratuities nor accept favors or anything of monetary value in excess of \$25.00 from each other or from vendors, contractors or potential vendors or contractors. Violations of this standard will result in disciplinary action being taken.

Appropriate disciplinary action will be determined by an Ad Hoc Committee of the CLMRWDB whose members will be free from any conflict of interest related to the party or parties involved.

- B. Except as allowed by applicable law, any Contractor or CLMRWDB Officer, Member, Employee or Agent who develops or drafts specifications, requirements, statements of work, invitations for bids, and/or requests for proposals shall be excluded from competing for such procurement. Further, except as allowed by applicable law, Persons, Organizations, and Employees in any way associated with such Officer, Member, Employee or Agent shall be excluded from competing for such procurement when a conflict of interest situation would be created by such competition.
- C. Except as allowed by applicable law no CLMRWDB Officer, Member, Employee or Agent shall participate in the selection, award, or administration of a contract where, to the best of the person's knowledge, the person or the person's immediate family, partners or organizations in which the person or the person's immediate family has a financial interest, or with whom the person is negotiating has any arrangement concerning prospective employment.
- D. No CLMRWDB Officer or Member shall discuss or vote on any proposal which is in competition with a proposal submitted by any party with whom the Officer or Member, or the Officer or Member's immediate family, has business, organizational or family ties.
- E. Arm's length relationships shall be maintained between contractors and CLMRWDB Officers, Members, Employees and Agents in the award and administration of contracts.
- F. Meetings of the CLMRWDB, its Committees, and between members, shall comply with the Florida Government in the Sunshine Act, Florida Statutes, Section 286.011.

- G. CLMRWDB Officers, Members and Employees shall complete a Disclosure of Potential Conflicts and Certification/Code of Conduct/Ethics Form (ADM-2) annually by July 1st, and a copy should be returned to CLMRWDB Administrative Office to be kept on file for the CLMRWDB.
  
- H. CLMRWDB Officers and Members shall complete a Financial Disclosure (Form 1) annually by July 1st, and should be filed with the Supervisor of Elections of the county in which they permanently reside.
  
- I. Upon discovery of an actual or potential conflict of interest, a CLMRWDB Officer, Member, Employee or Agent shall promptly file a written statement of disqualification and shall withdraw from any further participation in the transaction involved. The Officer, Member, Employee or Agent may, at the same time, apply to CLMRWDB's Legal Counsel for an advisory opinion as to what further participation, if any, the Officer, Member, Employee or Agent may have in the transaction.
  - a. No employee shall:
    - i. Accept any direct or indirect financial benefit from any source other than the CLMRWDB as a result of the performance of official duties.
  
    - ii. Accept any position, whether compensated or uncompensated, which will impair independence of judgment in the exercise of official duties.
  
    - iii. Accept any position or engage in any business which will require disclosure of information that could provide a competitive advantage to one party over another in procurement matters.
  
    - iv. Improperly disclose information acquired in the performance of official duties that could result in personal gain or provide a party a competitive advantage over another party in procurement matters.

- v. Use or attempt to use official position to secure unwarranted privileges or exemptions personally or on behalf of others or give the appearance of such action.
- vi. By conduct, give reasonable basis for the impression that any person or organization can improperly influence the performance of official duties.
- vii. Pursue a course of conduct which will raise suspicion among citizens that acts engaged in are in violation of public trust.
- viii. Pursue a course of conduct which will give rise to a violation of conflict of interest standards.
- ix. Take part in any prohibited political activities.
- x. Take part in any religious or anti-religious activity in the discharge of official responsibilities.
- xi. Promote or oppose unionization in the discharge of official duties.
- xii. Participate in any effort to violate any other applicable Federal, State or Local Law or Regulation.

Violations of any provision of this Code may be cause for immediate dismissal or other disciplinary actions provided for under the CLMRWDB's Personnel Rules and Policies.

## **ARTICLE XII: NONDISCRIMINATION:**

Section A: All actions taken by the CLMRWDB shall be made without regard to age, sex, race, religion, national origin, political affiliation, marital status, other prohibited bases under applicable law or handicap.



# SIGNATURE PAGE

**APPROVED:**

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CLMRWDB Chair

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CLMRWDB Vice-Chair

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Board Attorney

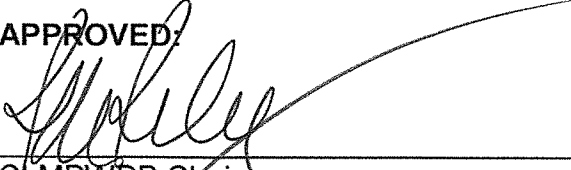
**ATTEST:**

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CLMRWDB Treasurer

**SIGNATURE PAGE**

**APPROVED:**



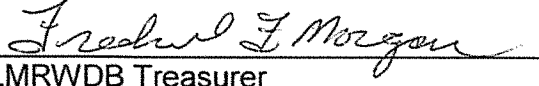
CLMRWDB Chair



CLMRWDB Vice-Chair

\_\_\_\_\_  
Board Attorney

**ATTEST:**



CLMRWDB Treasurer



## Board Membership

3/12/2020

	SECTOR	NAME
1	Apprenticeship	Fred Morgan
2	CBO/ Barriers	Theresa Flick
3	CBO/ Barriers	Charles Harris
4	CBO/Barriers-Vet	Ted Knight
5	Economic Development	David Pieklik
6	Economic Development	Bruce Register
7	Education-Adult	Mark Vianello
8	Education-Higher Private	Pete Beasley
9	Education-Higher Public	Mark Paugh
10	Education-School District	Debra Stanley
11	Labor	Fred Morgan
12	Labor	Nelson Mathis, Jr
13	Private Sector	Arno Proctor
14	Private Sector	Vacant
15	Private Sector	Vacant
16	Private Sector	Vacant
17	Private Sector	Vacant
18	Private Sector	Nicole Nash
19	Private Sector	Brandon Whiteman
20	Private Sector	Darlene Goddard
21	Private Sector	William Burda
22	Private Sector	Rachel Riley
23	Private Sector	Mike Melfi
24	Private Sector	Pat Reddish
25	Private Sector	Jeff Chang
26	Private Sector	Kevin Cunningham
27	Private Sector	Al Jones
28	Private Sector	Kathy Judkins
29	Private Sector	Kim Baxley
30	Transportation / Public Housing	Judy Houlios
31	Vocational Rehabilitation	Angie White
32	Youth Serving Organization	Carol Jones
33	Youth Serving Organization	Jorge Martinez

LWDB 10

## Workforce Services Plan

### Comments

0 comments received

**MEMORANDUM OF AGREEMENT**

**BETWEEN**

**THE CITRUS, LEVY, MARION REGIONAL WORKFORCE DEVELOPMENT BOARD, INC.**

**AND**

**THE CITRUS, LEVY, MARION WORKFORCE DEVELOPMENT CONSORTIUM**

**THIS AGREEMENT** is made and entered into between the Citrus, Levy, Marion Regional Workforce Development Board, Inc., hereinafter referred to as the **CLMRWDB**, and the Citrus, Levy, Marion Workforce Development Consortium, hereinafter referred to as the **CLMWDC**, for the purpose of establishing a Workforce Development Partnership, as authorized and provided for under Public Law 113-128, enacted by the Congress of the United States, which act is known as the "Workforce Innovation and Opportunity Act (herein after referred to WIOA), and Florida Statutes (F.S.) Chapter 445, and for the purpose of establishing an integrated management and control structure for the provision of job training, job placement and related benefits service.

**WITNESSETH:**

**WHEREAS**, the receipt and expenditure of WIOA funds authorized for certain Workforce Development Programs within local Workforce Development Areas (WDA) are dependent upon the establishment of a partnership between business and government; and

**WHEREAS**, the Governor on the part of the State of Florida has designated the counties of Citrus, Levy and Marion as a WDA; and

**WHEREAS**, the Counties of the WDA each represented by an Elected Official appointed by the governing board, have formed the **CLMWDC** through adoption of an Amended Interlocal Agreement pursuant to Florida Statutes, Chapter 163.01 to carry out these local governments' responsibilities within their collective and respective boundaries for the purpose of Workforce Development; and

**WHEREAS**, the **CLMRWDB**, representing business by its private sector majority, has been duly appointed by the **CLMWDC**; and

**WHEREAS**, the **CLMRWDB** is empowered and has the responsibility under the WIOA to provide policy guidance for, and exercise oversight with respect to, activities under a Plan for the WDA in partnership with the **CLMWDC**; and

**WHEREAS**, the WIOA requires the **CLMRWDB** and the **CLMWDC** to define the scope of their partnership by means of an Agreement; and

**WHEREAS**, the U.S. Department of Labor, has encouraged the development of a workforce development system governed by local workforce investment boards; and

**WHEREAS**, the purpose of these local boards is to develop local workforce development policies and strategies; to oversee the management and administration of those policies and strategies; and to develop an approach which consolidates the delivery of those workforce development strategies into a comprehensive, customer-centered system at the local level in concert with the chief elected officials of the local governments; develop broad regional plans that promote economic development through a trained workforce; and

**WHEREAS**, within the WDA comprised of Citrus, Levy and Marion Counties, there currently exists an effective, efficient and highly successful delivery system of federally and state-funded employment and training programs which are not customer-centered; and

**WHEREAS**, the programs envisioned under the control of the local workforce development boards include, but are not limited to, those funded through the WIOA, the Wagner-Peyser Act, Perkins vocational training, school-to-work transition programs, vocational rehabilitation, Job Opportunity Basic Skills Program (JOBS), Welfare to Work (WTW), Supplemental Nutritional Assistance Program (SNAP), Re-Employment Services and other workforce development programs and services;

**NOW THEREFORE**, be it resolved that this Agreement be made and entered into by the **CLMRWDB** and **CLMWDC** pursuant to WIOA, and that the parties mutually agree as follows:

- I. Authorities and Responsibilities Held Jointly by CLMRWDB and CLMWDC
  - A. It is the joint responsibility and responsibility of both parties to ensure effective service delivery to provide the most beneficial program services possible to the eligible residents of the WDA. It is further the shared

responsibility of all sectors of the community to participate in the provision of program services.

B. **CLMWDC** hereby designates CLMRWDB as the grant recipient and administrative entity for the WDA for the period July 1, 2020 through June 30, 2025.

C. **CLMRWDB** and **CLMWDC** shall jointly submit an approved local Workforce Development Plan to the Governor in accordance with the provisions of the WIOA and other applicable laws. CLMRWDB shall develop, in concert with other workforce investment boards within the workforce development region prescribed by the Governor, and present to the CLMWDC, a regional workforce development plan in accordance with Section 106 (c) of WIOA, to be approved and forwarded to the Governor.

D. **CLMRWDB** and **CLMWDC** shall decide the allocation of funds for the Workforce Development Plan's Budget.

E. **CLMRWDB** and **CLMWDC** shall jointly select and approve of the One Stop Operator.

F. Because the WIA indicates that a partnership exists that requires mutual agreement on certain matters, any disputes between the partners to this Agreement shall be resolved by a mutually satisfactory negotiation. It is understood that in accordance with the WIA, the failure to resolve any dispute to the mutual satisfaction of both parties regarding the WFR's make-up, submission of the Workforce Development Plan, designation of an administrative entity and grant recipient, or **CLMRWDB's** make-up shall result in the forwarding of the unresolved matter to the Governor of the State of Florida for resolution.

## II. Authorities and Responsibilities of the CLMRWDB

**CLMRWDB** shall:

A. Develop, review and approve the Workforce Development Plan for the WDA and the Regional Plan (WIOA, 106 (c));

B. Provide policy guidance in the development of Workforce Development activities and for the provision of services;

C. Provide oversight of Workforce Development programs, activities

and services conducted under the Workforce Development Plan;

D. Solicit the input and participation of the local business community in the development and provision of program services to eligible residents of the WDA;

E. Develop By-Laws to determine its operation;

F. Have the authority to:

1. Develop and approve a budget for itself within the parameters established in the Workforce Development Plan's provisions and WIOA Budget contained therein;

2. Select and hire a staff; and, establish criteria for its chief executive to be approved by CLMWDC;

3. Develop and prepare five year local and regional Workforce Development Plans for approval by the **CLMRWDB** and by the **CLMWDC**;

4. Provide staff support to the **CLMWDC**;

5. Collect data necessary for management and evaluation and the preparation of required and desired reports;

6. Exercise oversight with respect to activities under the Workforce Development Plan;

8. Arrange for service delivery through non-financial agreements; and contracts.

9. Procure all goods, services and property, including the maintenance and inventorying thereof, necessary for its proper operation;

10. Procure annual audits of funds and resolve any questions arising therefrom and provide copies of same, as well as an audited financial statement, to the **CLMWDC** annually;

11. Develop and maintain procedures to hear and resolve grievances;



12. Perform such other duties as are necessary to fulfill its obligations and responsibilities under this Agreement and applicable Federal and State laws, rules, policies and plans;

13. Procure director's and officer's and other liability insurance on behalf of itself and the **CLMWDC** to the extent that such insurance is available, budgetarily feasible, and allowable as an expense;

14. Provide quarterly reports to the **CLMWDC**; and

15. Remove **CLMRWDB** members for cause per procedures established by the **CLMWDC**; and

### III. Authorities and Responsibilities of the CLMWDC

The **CLMWDC** shall:

A. Review and approve the Workforce Development Plans for the WDA and Regional Programs;

B. Provide public policy guidance in the development of job training activities and provision of services under the Workforce Development Plan;

C. Establish the **CLMRWDB**, appoint members to the **CLMRWDB** if such authority is delegated to individual **CLMWDC** members by their respective county commissions (absent such delegation the power to appoint **CLMRWDB** members from any of the three counties shall reside in the respective County commissions and the power to appoint area representatives shall reside in the three county commissions or in their respective **CLMWDC** representatives authorized to appoint members, if any) and maintain the make-up of the **CLMRWDB** in compliance with the requirements of the WIOA, F. S, Chapter 445 and other applicable laws on a continuous basis, all in accordance with the agreement which created the **CLMRWDB**; and

D. Suggest such changes in the organization, composition and management of the **CLMRWDB** or shall be desirable to best meet the needs of the citizens of the counties within the WDA.

### IV. Term of Agreement

This Agreement shall become effective July 1, 2020 and shall continue in effect until June 30, 2025. Thereafter, this Agreement may be renewed by a further

writing between the parties.

V. Merger

It is understood and agreed that the entire Agreement between the parties is contained herein and that this Agreement supersedes all oral agreements and negotiations between the parties relating to the subject matter hereof. All items and other agreements referred to in this Agreement are incorporated herein by reference, and are deemed to be part of this Agreement. This Agreement replaces all prior Agreements between the parties as to the subject matter hereof as of the effective date of this Agreement.

VI. Amendment

Either party to this Agreement may propose to amend or modify the terms of this Agreement consistent with applicable Federal and State laws, Federal Regulations and State requirements, by providing to the other party sixty (60) days written notice of any proposed amendments. Any and all modifications or amendments to this Agreement are subject to the approval of both the **CLMRWDB** and **CLMWDC**.

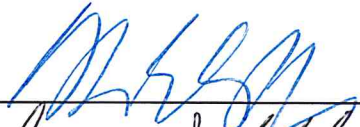
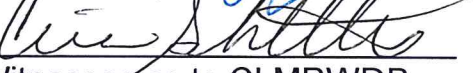
VII. Independence of Terms Under This Agreement

If any terms or provisions of this Agreement or the application thereof to any person or circumstance shall, to any extent be held invalid or unenforceable, the remainder of this Agreement, or the application of such term or provision to such person or circumstances other than those as to which it is held invalid or unenforceable, shall not be affected thereby and every other term and provision of this Agreement shall be valid and enforced to the fullest extent permitted by law.

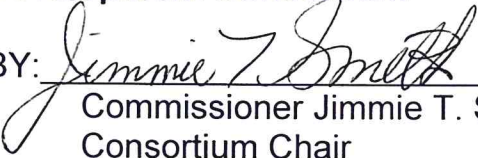
**IN WITNESS WHEREOF**, the parties hereto have executed this Agreement on the 4<sup>th</sup> day of March, 2020, and hereby agree to be bound by the terms and provision set forth herein effective July 1, 2020.

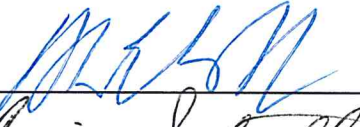

**Citrus, Levy, Marion Regional Workforce  
Development Board, Inc.**

BY:   
Rachel Riley, Chair

  
  
Witnesses as to CLMRWDB

**Citrus, Levy Marion Workforce  
Development Consortium**

BY:   
Commissioner Jimmie T. Smith,  
Consortium Chair

  
  
Witnesses to CLMWDC

# MEMORANDUM OF UNDERSTANDING

Between

Citrus Levy Marion Regional Workforce Development Board, Inc.  
DBA CareerSource Citrus Levy Marion

And

the Citrus County School Board

## 1. Purpose of this Memorandum of Understanding

The Workforce Innovation and Opportunity Act (WIOA) requires that a Memorandum of Understanding (MOU) be developed and executed between the local Workforce Development Board, in this case, CareerSource Citrus Levy Marion (CSCLM) and the Career Center Partners. This Act requires specific programs to make their services available through a one-stop delivery system, and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSCLM and the One-Stop system partners to establish an agreement concerning the operations of the one-stop system and to establish the framework for providing services to employers, employees, job seekers and others needing workforce services.

Florida's one-stop delivery system, the CareerSource Network, is a locally-driven system which develops strategic partnerships and provides streamlined and integrated programs and services to the businesses and citizens of Florida.

Florida's strategic vision for WIOA implementation will be 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.

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These objectives will be accomplished locally by providing all customers access to high-quality career centers within a one-stop system that connects them with the full range of services available in their communities, whether they are customers seeking to find jobs, build basic educational or occupational skills, earn a postsecondary certificate or degree, or obtain guidance on how to make career choices, or are businesses and employers seeking skilled workers.

The purpose of this MOU is to establish or enhance a cooperative working relationship between CSCLM and the Citrus County School Board and to define our respective roles and responsibilities in achieving the policy objectives.

## 2. System Partners

MOUs will be developed with system partner programs that are provided physically within the center, provided through cross-training of partner staff, or provided through direct linkage from technology. The partner programs and targeted population programs available in CSCLM will be:

### **Locally Operated by CSCLM through agreement with DEO**

- WIOA Title I Adult, Dislocated Worker and Youth\*
- WIOA Title III Wagner-Peyser\*
- Veterans Employment and Training\*
- Trade Act\*
- Unemployment\* (Primarily provided at State level)
- Temporary Assistance for Needy Families\*
- Supplemental Nutrition Act Program (SNAP)

### **Locally Operated by CSCLM through agreement with DOL**

- YouthBuild\*

### **MOU Provided at State Level**

- WIOA Title II Adult Education and Literacy\*
- WIOA Title IV Vocational Rehabilitation\*
- Carl Perkins Career and Technical Education\*

### **MOU with CSCLM**

- Title V Older Americans Act aka SSCEP\*
- Job Corps\*
- Community Action Agencies\*
- Housing Authorities\*
- Agencies serving individuals with disabilities
- Agencies serving youth with barriers to employment
- Early Learning Coalitions

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- Homeless Continuum of Care organizations
  - Veteran Agencies
  - Economic Development
  - Support Service Providers
  - Others as determined to be beneficial to serving both employers and job seekers.
- \* denotes those that are "required" partners

### 3. One-Stop System Description

As designated by CareerSource Florida on behalf of the Governor, CSCLM is the local workforce board and the regional planning area, under Title I of the WIOA. Currently CSCLM has been provided permission to provide and act as the One-Stop Operator and Career Services Provider.

The CSCLM area consists of the counties of Citrus, Levy and Marion with Career Centers located in Lecanto, Chiefland, and Ocala. The Ocala Career center located at 2703 NE 14<sup>th</sup> Street is the comprehensive center for CSCLM. A professional placement center is located at the College of Central Florida Campus in Ocala for specialized recruitment and placement of professionals throughout the region and in partnership with our training partners. CSCLM also has two mobile units to assist in providing services to remote and rural areas within the region.

All of our centers provide seamless access to workforce programs for both the job seeker and the employer. Our system is linked through Employ Florida, the State's talent matching system, to provide a system wide approach for job seeking and job placement.

Our centers provide access to a multitude of services that can be obtained through either self-service or with assistance from staff. By blending and weaving our various funding streams we are able to provide services to customers without pushing a customer from program to program, but handling in a customer driven manner based on individual strategies.

The One-Stop System is the result of the partnerships developed within our region that links the programs and services provided at the Career Centers and at other partner locations that provide the full complement of services needed by our customers.

This MOU will increase our ability to serve mutual customers, reduce duplication of efforts and expand our abilities to provide services throughout the One-Stop System either in one of our Career Centers, electronically at your location, or as an affiliate site.

### 4. General Responsibilities of One-Stop System Partners:

- The One-Stop System partner agrees to participate in joint planning, plan development, and modification of activities to result in:

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- o Continuous partnership building;
- o Continuous planning responsive to State and Federal requirements;
- o Responsive to specific local and economic conditions including employer needs;
- o Solutions to common data collection and reporting needs;
- Make available to customers through the One-Stop System the services that are applicable to the partners programs
- Participate in the operation of the One-Stop System consistent with the agreed upon "service integration" following in the next part, number 5
- Participate in capacity building and staff development activities
- Insure that all partners and staff are cross-trained to understand programs and specific "service integration" goals as specified in the next part, number 5

##### **5. Service Integration Plan and Goals:**

CSCLM and the Citrus County School Board

agree to the following:

This agreement establishes that the duly authorized agent of the recipient agrees to satisfy the requirements of 34 CFR 361.505 and 34 CFR 361.720.

This agreement formalizes the existing partnership between CSCLM and the Citrus County School Board to provide adult education and workforce services to our mutual customers. CSCLM and the Citrus County School Board recognize that blended services provided by all required and optional partners contributes to the One Stop 'system' and neither independently creates the 'system'. The combination of services provides employment and educational counseling and access to partner programs through direct referral and electronic access points within each office. CSCLM customers are counseled on all aspects of employment and education options available through educational entities and funding assistance provided through Titles I, II and IV funds under the WIOA. Appropriate referrals for intra-agency assistance are made between agencies through established contacts within each department and will be made in writing via e-mail between those contacts. The Citrus County School Board may refer training program completers and those customers in need of additional financial assistance to CSCLM for assessment and counseling regarding their individual needs.

Both agencies agree to maintain full programmatic accessibility and compliance with all applicable laws to ensure that individuals have equal ability to access available services as further discussed in sections 8 and 9 of this document. This access includes full ADA compliance, use of assistive technology and provision of accommodations that may be necessary for individuals with additional barriers.

This agreement exercises the DOL issued extension of the Infrastructure Funding Agreement (IFA) requirement until the established deadline of January 1, 2018. This extension is described in TEGL 17-16, section 14 issued on January 18, 2017. Both parties acknowledge and agree to the requirement of the IFA and are currently working with CSCLM's One Stop Operator to develop a mutually beneficial agreement that defines and monetizes each partners proportional use of the One Stop 'system'. The completed IFA will be mutually agreed upon and will become an attachment to this document.

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**6. Resource and Cost Sharing**

This MOU between CSCLM and the Citrus County School Board  
is an agreement of service provision.

**7. Data Access and Sharing**

To facilitate integration of services, partners are encouraged to provide cross-access or protected information from systems of customer data within the applicable federal and state privacy laws and regulations governing the partner programs. All state and federal confidentiality regulations regarding the creation, maintenance and/or use of records shall be in effect. Client records and/or information may be shared among partners subject to these confidentiality requirements. Data sharing arrangements will be included in section 5.

Client information shall be shared solely for the purpose of eligibility, enrollment, referral, or provision of services. In carrying out their respective responsibilities, each party shall respect and abide by the confidentiality policies of the other parties.

**8. Access for Individuals with Barriers to Employment**

All One-Stop system partners will ensure access for individuals with barriers to employment, and will offer priority for services to recipients of public assistance, other low-income individuals, or individuals who are basic skills deficient for individualized career services and training services funded with WIOA adult funds.

**9. Non-Discrimination**

As required by federal and state law, participating agencies will assure that no person shall be discriminated against in consideration for or receipt of partner agency services and/or employment based upon sex, disability, race, color, age, religion, national origin, political affiliation, belief, veteran status, familial status, sexual orientation, gender identity, pregnancy, or genetic information.

The One-Stop system partner will assure compliance with the Americans with Disabilities Act of 1990, and its Amendments, which prohibits discrimination on the basis of disability, as well as applicable regulations and guidelines issued pursuant to the ADA.

Partners agree to comply fully with the WIOA, Title VII of the civil rights act of 1964, the Age Discrimination Act of 1975, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities, and The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and

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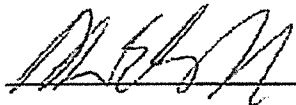
29 CFR Part 37 and all other regulations implementing the aforementioned laws.

**10. Duration, Modification, and Termination of the Partner MOU**


It is mutually understood that this MOU shall not become effective until signed. This MOU shall remain in effect until the date below, or until it is modified, extended or terminated in accordance with this section. Regardless of duration, this MOU shall be reviewed every year. This MOU may be amended at any time in writing and will be effective when signed by both entities. Either party may cancel its participation in whole or in part at any time with thirty (30) days written notice. This MOU will be in effect until: June 30, 2020.

**11. Signatures**

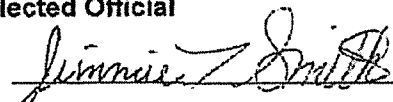
**Approved for Citrus Levy Marion  
Regional Workforce Development  
Board, Inc.:**

By:   
Name: Thomas E. Skinner, Jr.  
Title: Chief Executive Officer  
Date: 8/30/17

**Approved for:**  
the Citrus County School Board

By:   
Name: Virginia Bryant  
Title: Chairman  
Date: 10-24-17

**Chief Elected Official**

By:   
Name: Jimmie T. Smith  
Title: COMMISSIONER, CITRUS COUNTY  
CONSERVATION CHAIR  
Date: 8/30/17

# MEMORANDUM OF UNDERSTANDING

## ADDENDUM for Infrastructure Funding Agreement

Between

Citrus Levy Marion Regional Workforce Development Board, Inc.

DBA CareerSource Citrus Levy Marion

And

Citrus County School Board

### 1. Purpose of this Addendum

The Workforce Innovation and Opportunity Act (WIOA) requires that a Memorandum of Understanding (MOU) be developed and executed between the local Workforce Development Board, in this case, CareerSource Citrus Levy Marion (CSCLM) and the Career Center Partners. This Act requires specific programs to make their services available through a one-stop delivery system, and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSCLM and the required One-Stop system partners to establish an agreement concerning the operations of the one-stop system and to establish a mutual agreement that details how each required partner will contribute to the overall infrastructure costs of the One Stop system.

This document serves as an addendum to the previously signed MOU and details the contributions of each partner in regards to supporting the infrastructure of the system. Additionally, the duly authorized agent of the recipient agrees to satisfy the requirements of 34 CFR 361.505 and 34 CFR 361.720

### 2. Infrastructure and Cost Sharing

All partners within the Citrus Levy Marion One Stop system operate with lean budgets and have long standing relationships that have been established to braid and blend funding to maximize the impact of resources available to the citizens of our region. Due to this, the partners on this MOU are not currently co-located within the American Job Center, but provide support of its operations through in-kind contributions that have positive monetary impact on the day to day operations and expand the breadth of services available. CSCLM and the partner as listed on the originating MOU agree that infrastructure support for proportionate benefit from the One Stop system is provided in the following methods:

- Use of digital technology for shared customers to access online resources provided by CSCLM
- Provision of CSCLM outreach materials to the general public
- Educational support and counseling to CSCLM referred and enrolled students
- Access to classes in targeted occupations to enhance local talent pipeline
- Access to meeting space within the partner's facilities to meet with students to discuss CSCLM services and programmatic enrollment
  - Space usage provides expansion of services for CSCLM and reduces additional costs of itinerate space when needed

MOU Addendum

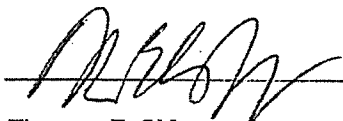
- Ongoing partnership for outreach and connection of Adult learners to the One Stop system

### 3. Duration, Modification, and Termination of the Partner MOU Addendum

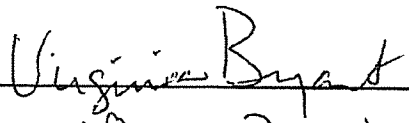
It is mutually understood that this Addendum shall not become effective until signed. This Addendum shall remain in effect until the date shown on the originating MOU and may be modified or terminated at any time by either party.

### 4. Signatures

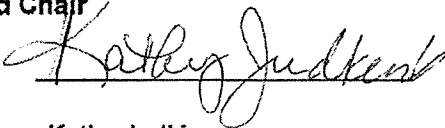
**Citrus Levy Marion Regional  
Workforce Development Board, Inc.  
d/b/a CareerSource Citrus Levy  
Marion**

By:   
Name: Thomas E. Skinner, Jr.  
Title: Chief Executive Officer  
Date: 10/26/2017

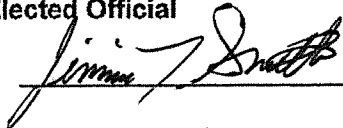
**Citrus County School Board**

By:   
Name: Virginia Bryant  
Title: Chairman  
Date: 10-24-17

**Board Chair**

By:   
Name: Kathy Judkins  
Title: Board Chair  
Date: 10/26/17

**Chief Elected Official**

By:   
Name: Jimmie T. Smith  
Title: Commissioner, Citrus County  
Consortium Chair  
Date: 10/31/17

MOU Addendum

# MEMORANDUM OF UNDERSTANDING

Between

Citrus Levy Marion Regional Workforce Development Board, Inc.  
DBA CareerSource Citrus Levy Marion  
And  
The School Board of Marion County, Florida

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The Workforce Innovation and Opportunity Act (WIOA) requires that a Memorandum of Understanding (MOU) be developed and executed between the local Workforce Development Board, in this case, CareerSource Citrus Levy Marion (CSCLM) and the Career Center Partners. This Act requires specific programs to make their services available through a one-stop delivery system, and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSCLM and the One-Stop system partners to establish an agreement concerning the operations of the one-stop system and to establish the framework for providing services to employers, employees, job seekers and others needing workforce services. Furthermore, this mutual agreement details how each required partner will support and contribute to the overall infrastructure costs of the One-Stop system.

Florida's one-stop delivery system, the CareerSource Network, is a locally-driven system which develops strategic partnerships and provides streamlined and integrated programs and services to the businesses and citizens of Florida.

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

- A. 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.
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These objectives will be accomplished locally by providing all customers access to high-quality career centers within a one-stop system that connects them with the full range of services available in their communities, whether they are customers seeking to find jobs, build basic

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educational or occupational skills, earn a postsecondary certificate or degree, or obtain guidance on how to make career choices, or are businesses and employers seeking skilled workers.

The purpose of this MOU is to establish or enhance a cooperative working relationship between CSCLM and The School Board of Marion County, Florida ("School Board") and to define our respective roles and responsibilities in achieving the policy objectives.

## 2. System Partners

MOUs will be developed with system partner programs that are provided physically within the center, provided through cross-training of partner staff, or provided through direct linkage from technology. The partner programs and targeted population programs available in CSCLM will be:

### **Locally Operated by CSCLM through agreement with Department of Economic Opportunity (DEO)**

- A. WIOA Title I Adult, Dislocated Worker and Youth\*
- B. WIOA Title III Wagner-Geyser\*
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- D. Trade Act\*
- E. Unemployment\* (Primarily provided at State level)
- F. Temporary Assistance for Needy Families\*
- G. Supplemental Nutrition Act Program (SNAP)

### **Locally Operated by CSCLM through agreement with Department of Labor (DOL)**

- H. YouthBuild\*

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- I. WIOA Title II Adult Education and Literacy\*
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- K. Carl Perkins Career and Technical Education\*

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- L. Title V Older Americans Act aka SSCEP\*
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- A. The One-Stop System partner agrees to participate in joint planning, plan development, and modification of activities to result in:
  - I. Continuous partnership building;
  - II. Continuous planning responsive to State and Federal requirements;
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  - IV. Solutions to common data collection and reporting needs;
- B. Make available to customers through the One-Stop System the services that are applicable to the partners' programs
- C. Participate in the operation of the One-Stop System consistent with the agreed upon "service integration" following in the next part, number 5
- D. Participate in capacity building and staff development activities
- E. Insure that all partners and staff are cross-trained to understand programs and specific "service integration" goals as specified in the next part, number 5

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## **5. Service Integration Plan and Goals:**

CSCLM and School Board agree to the following:

This agreement establishes that the duly authorized agent of the recipient agrees to satisfy the requirements of 34 CFR 361.505 and 34 CFR 361.720.

This agreement formalizes the existing partnership between CSCLM and School Board to provide adult education and workforce services to our mutual customers. CSCLM and School Board recognize that blended services provided by all required and optional partners contributes to the One Stop 'system' and neither independently creates the 'system'. The combination of services provides employment and educational counseling and access to partner programs through direct referral and electronic access points within each office. CSCLM customers are counseled on all aspects of employment and education options available through educational entities and funding assistance provided through Titles I, II and IV funds under the WIOA. Appropriate referrals for intra-agency assistance are made between agencies through established contacts within each department and will be made in writing via e-mail between those contacts. School Board may refer training program completers and those customers in need of additional financial assistance to CSCLM for assessment and counseling regarding their individual needs.

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## **6. Resource and Cost Sharing**

This MOU between CSCLM and School Board is an agreement of service integration.

## **7. Data Access and Sharing**

To facilitate integration of services, partners are encouraged to provide cross-access or protected information from systems of customer data within the applicable federal and state privacy laws and regulations governing the partner programs. All state and federal confidentiality regulations regarding the creation, maintenance and/or use of records shall be in effect. Client records and/or information may be shared among partners subject to these confidentiality requirements. Data sharing arrangements will be included in section 5.

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**9. Non-Discrimination**

As required by federal and state law, participating agencies will assure that no person shall be discriminated against in consideration for or receipt of partner agency services and/or employment based upon sex, disability, race, color, age, religion, national origin, political affiliation, belief, veteran status, familial status, gender, or pregnancy.

The One-Stop system partner will assure compliance with the Americans with Disabilities Act of 1990, and its Amendments, which prohibits discrimination on the basis of disability, as well as applicable regulations and guidelines issued pursuant to the ADA.

Partners agree to comply fully with the WIOA, Title VII of the civil rights act of 1964, the Age Discrimination Act of 1975, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities, and The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and 29 CFR Part 37 and all other regulations implementing the aforementioned laws.

**10. Duration, Modification, and Termination of the Partner MOU**

It is mutually understood that this MOU shall not become effective until signed. This MOU shall remain in effect until the date below, or until it is modified, extended or terminated in accordance with this section. Regardless of duration, this MOU shall be reviewed every year. This MOU may be amended at any time in writing and will be effective when signed by both entities. Either party may cancel its participation in whole or in part at any time with thirty (30) days written notice. This MOU will be in effect until: June 30, 2020.



## 11. Public Records.

CSCLM understands the broad nature of these laws and agrees to comply with Florida's Public Records Laws relating to records retention.

A. To the extent that CSCLM meets the definition of "contractor" under § 119.0701, Fla. Stats. (2017), and in addition to other contract requirements provided by law, the CSCLM agrees that it is acting as a contractor on behalf of SCHOOL BOARD as provided under § 119.0701(a) and as such it will comply with Florida's Public Records Law. Specifically, CSCLM agrees that it will:

- i. Keep and maintain public records that ordinarily and necessarily would be required by SCHOOL BOARD in order to perform the services performed by CSCLM under contract;
- ii. Provide the public with access to such public records on request from SCHOOL BOARD'S custodian of public records;
- iii. Provide SCHOOL BOARD with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law;
- iv. Ensure the public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if CSCLM does not transfer the records to the public agency;
- v. Upon completion of the contract, transfer, at no cost, to SCHOOL BOARD all public records in possession of CSCLM or keep and maintain public records required by the public agency to perform the service. If CSCLM transfers all public records to the public agency upon completion of the contract, CSCLM shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If CSCLM keeps and maintains public records upon completion of the contract, CSCLM shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to SCHOOL BOARD, upon request from SCHOOL BOARD'S custodian of public records, in a format that is compatible with the information technology systems of the public agency.

**B. IF CSCLM HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO CSCLM'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF RECORDS AT: Public Relations and Communication Officer: Kevin Christian, APR, CPRC, at (352) 671-7555, [public.relations@marion.k12.fl.us](mailto:public.relations@marion.k12.fl.us) or in person at 420-A SE Alvarez Avenue, Ocala, Florida 34471.**

## 12. Infrastructure and Cost Sharing

All partners within the Citrus Levy Marion One-Stop system operate with lean budgets and have long standing relationships that have been established to braid and blend funding to maximize the impact of resources available to the citizens of our region. Due to this, the partners on this MOU are not currently co-located within the American Job Center, but provide support of its operations through in-kind contributions that have a positive monetary impact on the day to day operations and expand the breadth of services available. CSCLM and School Board agree that infrastructure support for proportionate benefit from the One-

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by using TTY/TDD equipment via the Florida Relay Service at 711. If you need accommodations, call 1-800-434-5627 ext. 7878 or e-mail [accommodations@careersourceclm.com](mailto:accommodations@careersourceclm.com) three business days in advance. A proud member of the American Job Center network.

Stop system is provided in the following methods:

- A. Use of digital technology for shared customers to access online resources provided by CSCLM
- B. Provision of CSCLM outreach materials to the general public
- C. Educational support and counseling to CSCLM referred and enrolled students
- D. Access to classes in targeted occupations to enhance local talent pipeline
- E. Access to meeting space within the partner's facilities to meet with students to discuss CSCLM services and programmatic enrollment
  - I. Space usage provides expansion of services for CSCLM and reduces additional costs of itinerate space when needed
- F. Ongoing partnership for outreach and connection of Adult learners to the One-Stop system
- G. School Board will continue to permit the use of one modular unit and utilities for the CSCLM sponsored Forward March program at the Marion Technical College. Facility usage is estimated at \$31,000.00 per year.

13. Signatures

Citrus Levy Marion Regional  
Workforce Development Board,  
Inc. d/b/a CareerSource Citrus  
Levy Marion

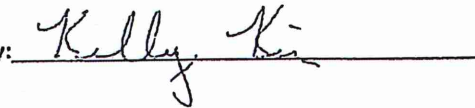
The School Board of Marion County  
Florida

By: 

Name: Thomas E. Skinner, Jr.

Title: Chief Executive Officer

Date: 10/25/2017

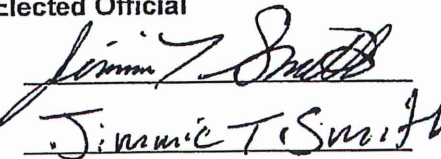
By: 

Name: Kelly King

Title: Board Chair

Date: OCT 24 2017

Chief Elected Official

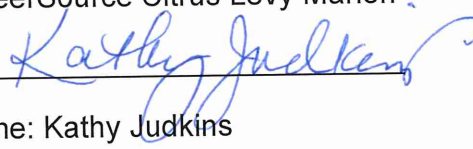
By: 

Name: Jimmie T. Smith

Title: Commissioner dist 3

Date: 10/31/17

CareerSource Citrus Levy Marion

By: 

Name: Kathy Judkins

Title: Board Chair

Date: 11/02/17

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# MEMORANDUM OF UNDERSTANDING

Between

Citrus Levy Marion Regional Workforce Development Board, Inc.  
DBA CareerSource Citrus Levy Marion

And

National Caucus and Center on Black Aging, Inc. (NCBA)

## 1. Purpose of this Memorandum of Understanding

The Workforce Innovation and Opportunity Act (WIOA) requires that a Memorandum of Understanding (MOU) be developed and executed between the local Workforce Development Board, in this case, CareerSource Citrus Levy Marion (CSCLM) and the Career Center Partners. This Act requires specific programs to make their services available through a one-stop delivery system, and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSCLM and the One-Stop system partners to establish an agreement concerning the operations of the one-stop system and to establish the framework for providing services to employers, employees, job seekers and others needing workforce services. Furthermore, this mutual agreement details how each required partner will support and contribute to the overall infrastructure costs of the One-Stop system.

Florida's one-stop delivery system, the CareerSource Network, is a locally-driven system which develops strategic partnerships and provides streamlined and integrated programs and services to the businesses and citizens of Florida.

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

- A. 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.
- B. 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.
- C. 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.

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These objectives will be accomplished locally by providing all customers access to high-quality career centers within a one-stop system that connects them with the full range of services available in their communities, whether they are customers seeking to find jobs, build basic educational or occupational skills, earn a postsecondary certificate or degree, or obtain guidance on how to make career choices, or are businesses and employers seeking skilled workers.

The purpose of this MOU is to establish or enhance a cooperative working relationship between CSCLM and NCBA to define our respective roles and responsibilities in achieving the policy objectives.

## 2. **System Partners**

MOUs will be developed with system partner programs that are provided physically within the center, provided through cross-training of partner staff, or provided through direct linkage from technology. The partner programs and targeted population programs available in CSCLM will be:

### **Locally Operated by CSCLM through agreement with DEO**

- A. WIOA Title I Adult, Dislocated Worker and Youth\*
- B. WIOA Title III Wagner-Peyser\*
- C. Veterans Employment and Training\*
- D. Trade Act\*
- E. Unemployment\* (Primarily provided at State level)
- F. Temporary Assistance for Needy Families\*
- G. Supplemental Nutrition Act Program (SNAP)

### **Locally Operated by CSCLM through agreement with DOL**

- H. YouthBuild\*

### **MOU Provided at State Level**

- I. WIOA Title II Adult Education and Literacy\*
- J. WIOA Title IV Vocational Rehabilitation\*
- K. Carl Perkins Career and Technical Education\*

### **MOU with CSCLM**

- L. Title V Older Americans Act aka SSCEP\*
- M. Job Corps\*
- N. Community Action Agencies\*
- O. Housing Authorities\*
- P. Agencies serving individuals with disabilities
- Q. Agencies serving youth with barriers to employment
- R. Early Learning Coalitions
- S. Homeless Continuum of Care organizations
- T. Veteran Agencies
- U. Economic Development

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- V. Support Service Providers
- W. Others as determined to be beneficial to serving both employers and job seekers.

\* denotes those that are "required" partners

### 3. One-Stop System Description

As designated by CareerSource Florida on behalf of the Governor, CSCLM is the local workforce board and the regional planning area, under Title I of the WIOA. Currently CSCLM has been provided permission to provide and act as the One-Stop Operator and Career Services Provider.

The CSCLM area consists of the counties of Citrus, Levy and Marion with Career Centers located in Lecanto, Chiefland, and Ocala. The Ocala Career center located at 2703 NE 14<sup>th</sup> Street is the comprehensive center for CSCLM. A professional placement center is located at the College of Central Florida Campus in Ocala for specialized recruitment and placement of professionals throughout the region and in partnership with our training partners. CSCLM also has two mobile units to assist in providing services to remote and rural areas within the region.

All of our centers provide seamless access to workforce programs for both the job seeker and the employer. Our system is linked through Employ Florida, the State's talent matching system, to provide a system wide approach for job seeking and job placement.

Our centers provide access to a multitude of services that can be obtained through either self-service or with assistance from staff. By blending and weaving our various funding streams we are able to provide services to customers without pushing a customer from program to program, but handling in a customer driven manner based on individual strategies.

The One-Stop System is the result of the partnerships developed within our region that links the programs and services provided at the Career Centers and at other partner locations that provide the full complement of services needed by our customers.

This MOU will increase our ability to serve mutual customers, reduce duplication of efforts and expand our abilities to provide services throughout the One-Stop System either in one of our Career Centers, electronically at your location, or as an affiliate site.

### 4. General Responsibilities of One-Stop System Partners:

- A. The One-Stop System partner agrees to participate in joint planning, plan development, and modification of activities to result in:
  - I. Continuous partnership building;
  - II. Continuous planning responsive to State and Federal requirements;
  - III. Responsive to specific local and economic conditions including employer needs;

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- IV. Solutions to common data collection and reporting needs;
- B. Make available to customers through the One-Stop System the services that are applicable to the partners' programs
- C. Participate in the operation of the One-Stop System consistent with the agreed upon "service integration" following in the next part, number 5
- D. Participate in capacity building and staff development activities
- E. Insure that all partners and staff are cross-trained to understand programs and specific "service integration" goals as specified in the next part, number 5

**5. Service Integration Plan and Goals:**

CSCLM and theNational Caucus and Center on Black Aging, Inc. (NCBA) agree to the following:

This agreement establishes that the duly authorized agent of the recipient agrees to satisfy the requirements of 34 CFR 361.505 and 34 CFR 361.720.

This agreement formalizes the existing partnership between CSCLM and NCBA to provide employment and training services to our mutual customers. CSCLM and NCBA recognize that blended services provided by all required and optional partners contributes to the One Stop 'system' and neither independently creates the 'system'. The combination of services provides employment and educational counseling and access to partner programs through direct referral and electronic access points within each office. CSCLM customers are counseled on all aspects of employment and education options available through educational entities and funding assistance provided through Titles I, II and IV funds under the WIOA. Appropriate referrals for intra-agency assistance are made between agencies through established contacts within each department and will be made in writing via e-mail between those contacts. NCBA may refer training program completers and those customers in need of additional financial assistance to CSCLM for assessment and counseling regarding their individual needs.

Both agencies agree to maintain full programmatic accessibility and compliance with all applicable laws to ensure that individuals have equal ability to access available services as further discussed in sections 8 and 9 of this document. This access includes full ADA compliance, use of assistive technology and provision of accommodations that may be necessary for individuals with additional barriers.

**NCBA shall:**

1. Maintain and provide updated NCBA information to customers interested in CSCLM core services.
2. Provide NCBA program eligibility determination services to all customers interested in and possibly eligible for NCBA program services.
3. Accept and process customers referred by other CSCLM agencies/organizations to determine their eligibility for NCBA services. Referrals and customer-related information may be coordinated and/or forwarded directly or via electronic linkages.
4. Provide NCBA services to program-certified customers.
5. Participate in the development of a common application or pre-application format and/or procedure and a referral process to direct applicants to other One-Stop System agencies/organizations.
6. Ensure a CareersourceCLM.com email address is the primary email address for all staff located on a full time or itinerant basis in a CSCLM and/or One-Stop Delivery System office.

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7. List job openings through CSCLM. Refer customers demonstrating interests in and possibly eligible for agency/organization program services, as appropriate. Ensure all outreach efforts that include a reference to CSCLM receive prior approval from appropriate marketing staff.
8. Coordinate customer needs with CSCLM One-Stop System agencies/organizations to reduce or eliminate duplicated services and, whenever possible, to develop the best mix of services.
9. Ensure NCBA staff attend, participate in, and contribute to CSCLM One-Stop System cross training activities, as required.
10. Participate in the development and implementation of other One-Stop Center procedures, policies, reports, customer surveys, and operational agreements. Ensure employment placement information generated by NCBA is entered into state and local data collection systems. Actively participate in the development and maintenance of organizational reports that reflect the nature of NCBA's operations. Provide this information to the One-Stop Operator at least quarterly.
11. Support and cooperate with the CSCLM One-Stop Operator and other One-Stop System agencies, organizations to ensure all federal, state, and local laws, regulations, policies and procedures are applied to One-Stop System operations.
12. Ensure staff follow all applicable CSCLM policies as they relate to dress code, facility, operational and computer usage policies.

**CareerSource Citrus Levy Marion agrees to:**

1. Refer customers that may potentially be eligible for services provided by NCBA.
2. Provide career services to NCBA enrolled customers to assist in the development and placement of joint customers.
3. Provide the opportunity for NCBA employees to participate in CSCLM sponsored training and staff development.
4. Assist NCBA staff to attain performance goals through joint collaboration of services available through the One Stop system to meet the common employment and training goals of all involved parties.
5. Provide facility space for NCBA staff and volunteers when/where possible.

**6. Resource and Cost Sharing**

This MOU between CSCLM and NCBA is an agreement of service integration and in-kind contributions

**7. Data Access and Sharing**

To facilitate integration of services, partners are encouraged to provide cross-access or protected information from systems of customer data within the applicable federal and state privacy laws and regulations governing the partner programs. All state and federal confidentiality regulations regarding the creation, maintenance and/or use of records shall be in effect. Client records and/or information may be shared among partners subject to these confidentiality requirements. Data sharing arrangements will be included in section 5.

Client information shall be shared solely for the purpose of eligibility, enrollment, referral, or provision of services. In carrying out their respective responsibilities, each party shall respect and abide by the confidentiality policies of the other parties.

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## **8. Access for Individuals with Barriers to Employment**

All One-Stop system partners will ensure access for individuals with barriers to employment, and will offer priority for services to recipients of public assistance, other low-income individuals, or individuals who are basic skills deficient for individualized career services and training services funded with WIOA adult funds.

## **9. Non-Discrimination**

As required by federal and state law, participating agencies will assure that no person shall be discriminated against in consideration for or receipt of partner agency services and/or employment based upon sex, disability, race, color, age, religion, national origin, political affiliation, belief, veteran status, familial status, gender, or pregnancy.

The One-Stop system partner will assure compliance with the Americans with Disabilities Act of 1990, and its Amendments, which prohibits discrimination on the basis of disability, as well as applicable regulations and guidelines issued pursuant to the ADA.

Partners agree to comply fully with the WIOA, Title VII of the civil rights act of 1964, the Age Discrimination Act of 1975, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities, and The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and 29 CFR Part 37 and all other regulations implementing the aforementioned laws.

## **10. Duration, Modification, and Termination of the Partner MOU**

It is mutually understood that this MOU shall not become effective until signed. This MOU shall remain in effect until the date below, or until it is modified, extended or terminated in accordance with this section. Regardless of duration, this MOU shall be reviewed every year. This MOU may be amended at any time in writing and will be effective when signed by both entities. Either party may cancel its participation in whole or in part at any time with thirty (30) days written notice. This MOU will be in effect until: June 30, 2020.

## **11. Public Records.**

CSCLM and NCBA understand the broad nature of these laws and agree to comply with Florida's Public Records Laws relating to records retention.

A. To the extent that either CSCLM or NCBA meets the definition of "contractor" under § 119.0701, Fla. Stats. (2017), and in addition to other contract requirements provided by law, the CSCLM/NCBA agrees that it is acting as a contractor on behalf of the other as provided under § 119.0701(a) and as such it will comply with Florida's Public Records Law. Specifically, CSCLM and NCBA agree to:

- i. Keep and maintain public records that ordinarily and necessarily would be required by NCBA in order to perform the services performed by CSCLM under contract;

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- ii. Provide the public with access to such public records on request from NCBA's custodian of public records;
- iii. Provide NCBA with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law;
- iv. Ensure the public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if CSCLM does not transfer the records to the public agency;
- v. Upon completion of the contract, transfer, at no cost, to NCBA all public records in possession of CSCLM or keep and maintain public records required by the public agency to perform the service. If CSCLM transfers all public records to the public agency upon completion of the contract, CSCLM shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If CSCLM keeps and maintains public records upon completion of the contract, CSCLM shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to NCBA, upon request from NCBA's custodian of public records, in a format that is compatible with the information technology systems of the public agency.

**12. Infrastructure and Cost Sharing**

All partners within the Citrus Levy Marion One-Stop system operate with lean budgets and have long standing relationships that have been established to braid and blend funding to maximize the impact of resources available to the citizens of our region. Due to this, the partners agree upon in-kind contributions that have a positive monetary impact on the day to day operations and expand the breadth of services available. CSCLM and NCBA agree that infrastructure support for proportionate benefit from the One-Stop system is provided in the following methods:

- A. Provision of employment and training services to universal CareerSource Citrus Levy Marion customers.
- B. Provision of CSCLM outreach materials to the general public
- C. Educational support and counseling to CSCLM referred and enrolled individuals
- D. Ongoing partnership for outreach and connection of Adult learners to the One-Stop system
- E. Provision of additional staff support within CareerSource Citrus Levy Marion's career centers through provision of participating trainees to perform various tasks within the centers varying from general clerical to customer assistance in the resource area. This in-kind contribution supports the infrastructure of the One Stop system. This contribution is calculated as the following based on average participation of trainees within the career centers:

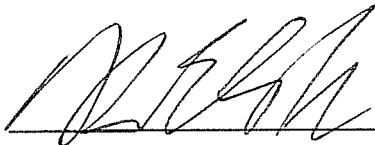
Program Contribution Per Participant (One Participant = 0.5 FTE)	2018 Rate	Hours	Weeks Per Year	Sub	7.65% Benefits (FICA 6.2%, Medicare \$1.45%)	Total
Participant 1	\$8.25	20	52	\$8,580.00	\$656.37	\$9,236.37
Participant 2	\$8.25	20	52	\$8,580.00	\$656.37	\$9,236.37
<b>Total NCBA Costs</b>						<b>\$18,482.74</b>

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**13. Signatures**

**Citrus Levy Marion Regional  
Workforce Development Board,  
Inc. d/b/a CareerSource Citrus  
Levy Marion**

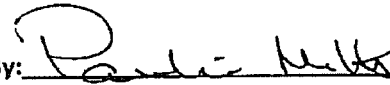
**NCBA National Caucus and Center on  
Black Aging, Inc.**

By: 

Name: Thomas E. Skinner, Jr.

Title: Chief Executive Officer

Date: 2-12-18

By: 

Name: Pauline Mills

Title: Program Manager - FL NCBA

Date: 2-13-18

# MEMORANDUM OF UNDERSTANDING

Between

Citrus Levy Marion Regional Workforce Development Board, Inc.  
DBA CareerSource Citrus Levy Marion  
And

Pinellas County Urban League (PCUL) - Urban Seniors Jobs  
Program (USJP)

## 1. Purpose of this Memorandum of Understanding

The Workforce Innovation and Opportunity Act (WIOA) requires that a Memorandum of Understanding (MOU) be developed and executed between the local Workforce Development Board, in this case, CareerSource Citrus Levy Marion (CSCLM) and the Career Center Partners. This Act requires specific programs to make their services available through a one-stop delivery system, and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSCLM and the One-Stop system partners to establish an agreement concerning the operations of the one-stop system and to establish the framework for providing services to employers, employees, job seekers and others needing workforce services.

Florida's one-stop delivery system, the CareerSource Network, is a locally-driven system which develops strategic partnerships and provides streamlined and integrated programs and services to the businesses and citizens of Florida.

Florida's strategic vision for WIOA implementation will be 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.

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These objectives will be accomplished locally by providing all customers access to high-quality career centers within a one-stop system that connects them with the full range of services available in their communities, whether they are customers seeking to find jobs, build basic educational or occupational skills, earn a postsecondary certificate or degree, or obtain guidance on how to make career choices, or are businesses and employers seeking skilled workers.

The purpose of this MOU is to establish or enhance a cooperative working relationship between CSCLM and Pinellas County Urban League (PCUL) - Urban Seniors Jobs Program (USJP) and to define our respective roles and responsibilities in achieving the policy objectives.

## 2. System Partners

MOUs will be developed with system partner programs that are provided physically within the center, provided through cross-training of partner staff, or provided through direct linkage from technology. The partner programs and targeted population programs available in CSCLM will be:

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- Trade Act\*
- Unemployment\* (Primarily provided at State level)
- Temporary Assistance for Needy Families\*
- Supplemental Nutrition Act Program (SNAP)

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- YouthBuild\*

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- WIOA Title IV Vocational Rehabilitation\*
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- Homeless Continuum of Care organizations
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  - Economic Development
  - Support Service Providers
  - Others as determined to be beneficial to serving both employers and job seekers.
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### **3. One-Stop System Description**

As designated by CareerSource Florida on behalf of the Governor, CSCLM is the local workforce board and the regional planning area, under Title I of the WIOA. Currently CSCLM has been provided permission to provide and act as the One-Stop Operator and Career Services Provider.

The CSCLM area consists of the counties of Citrus, Levy and Marion with Career Centers located in Lecanto, Chiefland, and Ocala. The Ocala Career center located at 2703 NE 14<sup>th</sup> Street is the comprehensive center for CSCLM. A professional placement center is located at the College of Central Florida Campus in Ocala for specialized recruitment and placement of professionals throughout the region and in partnership with our training partners. CSCLM also has two mobile units to assist in providing services to remote and rural areas within the region.

All of our centers provide seamless access to workforce programs for both the job seeker and the employer. Our system is linked through Employ Florida, the State's talent matching system, to provide a system wide approach for job seeking and job placement.

Our centers provide access to a multitude of services that can be obtained through either self-service or with assistance from staff. By blending and weaving our various funding streams we are able to provide services to customers without pushing a customer from program to program, but handling in a customer driven manner based on individual strategies.

The One-Stop System is the result of the partnerships developed within our region that links the programs and services provided at the Career Centers and at other partner locations that provide the full complement of services needed by our customers.

This MOU will increase our ability to serve mutual customers, reduce duplication of efforts and expand our abilities to provide services throughout the One-Stop System either in one of our Career Centers, electronically at your location, or as an affiliate site.

### **4. General Responsibilities of One-Stop System Partners:**

- The One-Stop System partner agrees to participate in joint planning, plan development, and modification of activities to result in:

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An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by using TTY/TDD equipment via the Florida Relay Service at 711. If you need accommodations, call 1-800-434-5627 ext. 7878 or e-mail [accommodations@careersourceclm.com](mailto:accommodations@careersourceclm.com) three business days in advance. A proud member of the American Job Center Network.

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- o Continuous partnership building;
- o Continuous planning responsive to State and Federal requirements;
- o Responsive to specific local and economic conditions including employer needs;
- o Solutions to common data collection and reporting needs;
- Make available to customers through the One-Stop System the services that are applicable to the partners programs
- Participate in the operation of the One-Stop System consistent with the agreed upon "service integration" following in the next part, number 5
- Participate in capacity building and staff development activities
- Insure that all partners and staff are cross-trained to understand programs and specific "service integration" goals as specified in the next part, number 5

## 5. Service Integration Plan and Goals:

CSCLM and Pinellas County Urban League (PCUL) - Urban Seniors Jobs Program (USJP)

agree to the following:

PCUL/USJP shall:

1. Maintain and provide updated PCUL/USJP information to customers interested in CSCLM core services.
2. Provide PCUL/USJP program eligibility determination services to all customers interested in and possibly eligible for PCUL/USJP program services.
3. Accept and process customers referred by other CSCLM agencies/organizations to determine their eligibility for PCUL/USJP services. Referrals and customer-related information may be coordinated and/or forwarded directly or via electronic linkages.
4. Provide PCUL/USJP services to program-certified customers.
5. Participate in the development of a common application or pre-application format and/or procedure and a referral process to direct applicants to other One-Stop System agencies/organizations.
6. Ensure a CareerSourceCLM.com email address is the primary email address for all staff located on a full time or itinerant basis in a CSCLM and/or One-Stop Delivery System office.
7. List job openings through CSCLM. Refer customers demonstrating interests in and possibly eligible for agency/organization program services, as appropriate. Ensure all outreach efforts that include a reference to CSCLM receive prior approval from appropriate marketing staff.
8. Coordinate customer needs with CSCLM One-Stop System agencies/organizations to reduce or eliminate duplicated services and, whenever possible, to develop the best mix of services.
9. Ensure PCUL/USJP staff attend, participate in, and contribute to CSCLM One-Stop System cross training activities, as required.
10. Participate in the development and implementation of other One-Stop Center procedures, policies, reports, customer surveys, and operational agreements. Ensure employment placement information generated by PCUL/USJP is entered into state and local data collection systems. Actively participate in the development and maintenance of organizational reports that reflect the nature of PCUL/USJP's operations. Provide this information to the One-Stop Operator at least quarterly.
11. Support and cooperate with the CSCLM One-Stop Operator and other One-Stop System agencies, organizations to ensure all federal, state, and local laws, regulations, policies and procedures are applied to One-Stop System operations.
12. Ensure staff follow all applicable CSCLM policies as they relate to dress code, facility, operational and computer usage policies.

CareerSource Citrus Levy Marion agrees to:

1. Provide facility usage for the PCUL/USJP staff as part of our partnership.
2. Provide access and use of the CSCLM computer network to PCUL/USJP staff for purposes of work conducted within the terms of this MOU.
3. Provide PCUL/USJP staff ongoing 'helpdesk' support when operating the CSCLM computer network.
3. Refer customers that may potentially be eligible for services provided by PCUL/USJP.
4. Provide career services to PCUL/USJP enrolled customers to assist in the development and placement of joint customers.
5. Provide the opportunity for PCUL/USJP employees to participate in CSCLM sponsored training and staff development.
6. Assist PCUL/USJP staff to attain performance goals through joint collaboration of services available through the One Stop system to meet the common employment and training goals of all involved parties.

An equal opportunity employer/program. Auxiliary aids and services are available upon request to Individuals with disabilities. All voice telephone numbers may be reached by using TTY/TDD equipment via the Florida Relay Service at 711. If you need accommodations, call 1-800-434-5627 ext. 7878 or e-mail [accommodations@careersourceclm.com](mailto:accommodations@careersourceclm.com) three business days in advance. A proud member of the American Job Center network.

MOU

Page 4 of 6

**6. Resource and Cost Sharing**

This MOU between CSCLM and Pinellas County Urban League (PCUL) - Urban Seniors Jobs Program (USJP) is an agreement of service and facility collaboration.

**7. Data Access and Sharing**

To facilitate integration of services, partners are encouraged to provide cross-access or protected information from systems of customer data within the applicable federal and state privacy laws and regulations governing the partner programs. All state and federal confidentiality regulations regarding the creation, maintenance and/or use of records shall be in effect. Client records and/or information may be shared among partners subject to these confidentiality requirements. Data sharing arrangements will be included in section 5.

Client information shall be shared solely for the purpose of eligibility, enrollment, referral, or provision of services. In carrying out their respective responsibilities, each party shall respect and abide by the confidentiality policies of the other parties.

**8. Access for Individuals with Barriers to Employment**

All One-Stop system partners will ensure access for individuals with barriers to employment, and will offer priority for services to recipients of public assistance, other low-income individuals, or individuals who are basic skills deficient for individualized career services and training services funded with WIOA adult funds.

**9. Non-Discrimination**

As required by federal and state law, participating agencies will assure that no person shall be discriminated against in consideration for or receipt of partner agency services and/or employment based upon sex, disability, race, color, age, religion, national origin, political affiliation, belief, veteran status, familial status, sexual orientation, gender identity, pregnancy, or genetic information.

The One-Stop system partner will assure compliance with the Americans with Disabilities Act of 1990, and its Amendments, which prohibits discrimination on the basis of disability, as well as applicable regulations and guidelines issued pursuant to the ADA.

Partners agree to comply fully with the WIOA, Title VII of the civil rights act of 1964, the Age Discrimination Act of 1975, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities, and The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and

29 CFR Part 37 and all other regulations implementing the aforementioned laws.

**10. Duration, Modification, and Termination of the Partner MOU**


It is mutually understood that this MOU shall not become effective until signed. This MOU shall remain in effect until modified, extended or terminated in accordance with this section. However, this MOU shall be reviewed every two (2) years. This MOU may be amended at any time in writing and will be effective when signed by both entities.

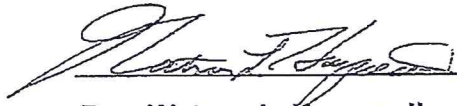
Either party may cancel its participation in whole or in part at any time with thirty (30) days written notice.

**11. Signatures**

Approved for Citrus Levy Marion  
Regional Workforce Development  
Board, Inc.:

Approved for: Pinellas County Urban League (PCUL)  
- Urban Seniors Jobs Program (USJP)

By:   
Name: Thomas E. Skinner, Jr.  
Title: Chief Executive Officer  
Date: 1-29-18

By:   
Name: Rev. Watson L. Haynes, II  
Title: President & CEO  
Date: 12/21/17



# MEMORANDUM OF UNDERSTANDING

## **ADDENDUM for Infrastructure Funding Agreement**

Between

Citrus Levy Marion Regional Workforce Development Board, Inc.

DBA CareerSource Citrus Levy Marion

And

Pinellas County Urban League (PCUL) – Urban Seniors Jobs

Program (USJP)

### **1. Purpose of this Addendum**

The Workforce Innovation and Opportunity Act (WIOA) requires that a Memorandum of Understanding (MOU) be developed and executed between the local Workforce Development Board, in this case, CareerSource Citrus Levy Marion (CSCLM) and the Career Center Partners. This Act requires specific programs to make their services available through a one-stop delivery system and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSCLM and the required One-Stop system partners to establish an agreement concerning the operations of the one-stop system and to establish a mutual agreement that details how each required partner will contribute to the overall infrastructure costs of the One-Stop system.

This document serves as an addendum to the previously signed MOU and details the contributions of each partner in regards to supporting the infrastructure of the system.

### **2. Infrastructure and Cost Sharing**

All partners within the Citrus Levy Marion One-Stop system operate with lean budgets and have long standing relationships that have been established to braid and blend funding to maximize the impact of resources available to the citizens of our region. The partners on this MOU are currently co-located within the American Job Center and provide support of its operations through in-kind contributions that have a positive monetary impact on the day to day operations and expand the breadth of services available. CSCLM and the partner as listed on the originating MOU agree that infrastructure support for proportionate benefit from the One-Stop system is provided in the following methods:

- A. Provision of employment and training services to universal CareerSource Citrus Levy Marion customers.
- B. Provision of CSCLM outreach materials to the general public
- C. Educational support and counseling to CSCLM referred and enrolled individuals
- D. Ongoing partnership for outreach and connection of Adult learners to the One-Stop system
- E. Provision of additional staff support within CareerSource Citrus Levy Marion's career centers through provision of participating trainees to perform various tasks within the centers varying from general clerical to customer assistance in the resource area. This in-kind contribution supports the infrastructure of the One Stop system. This contribution is calculated as the following based on average participation of trainees within the career centers:

Program Contribution Per Participant (One Participant = 0.5 FTE)	2018 Rate	Hours	Weeks Per Year	Sub	7.65% Benefits (FICA 6.2%, Medicare \$1.45%)	Total
Participant 1	\$8.25	20	52	\$8,580.00	\$656.37	\$9,236.37
Participant 2	\$8.25	20	52	\$8,580.00	\$656.37	\$9,236.37
<b>Total PCUL Foundation Costs</b>						<b>\$18,482.74</b>

**3. Duration, Modification, and Termination of the Partner MOU Addendum**

It is mutually understood that this Addendum will not become effective until signed. This Addendum will remain in effect until the date shown on the originating MOU and may be modified or terminated at any time by either party in accordance with the procedures outlined in the originating MOU. Infrastructure funding agreements will be reviewed annually and adjusted as agreed upon by both parties should changes occur.

**4. Signatures**

**Citrus Levy Marion Regional  
Workforce Development Board, Inc.  
d/b/a CareerSource Citrus Levy  
Marion**

**Pinellas Urban League/Urban Seniors Jobs  
Program**

By: \_\_\_\_\_

By: \_\_\_\_\_

Name **Thomas E. Skinner, Jr.**

Name: **Rev. Watson L. Haynes, II**

Title: **Chief Executive Officer**

Title: **President & CEO**

Date: \_\_\_\_\_

**1-29-18**

Date: \_\_\_\_\_

**1-29-18**

MEMORANDUM OF UNDERSTANDING  
NO.: IA-761  
BETWEEN  
CAREERSOURCE CITRUS LEVY MARION  
AND  
FLORIDA DEPARTMENT OF EDUCATION  
DIVISION OF VOCATIONAL REHABILITATION  
AMENDMENT NO. 1

Memorandum of Understanding (MOU) number IA-761, entered into by and between CareerSource Citrus Levy Marion ("CareerSource") and the Florida Department of Education, Division of Vocational Rehabilitation ("Partner") on August 19, 2016, is hereby amended as follows:

1. Section VII., Term, first paragraph, is hereby amended to now read:

This MOU is effective July 1, 2016 or date fully executed, through June 30, 2020 and may be renewed for successive one-year terms upon written concurrence between the parties. This MOU may be terminated for convenience at any time by either party upon thirty (30) days written notice.

2. Attachment I, Infrastructure Funding Agreement, including all attachments thereto, is hereby incorporated in its entirety.

All provisions in the MOU not in conflict with this Amendment remain in full force and effect and are to be performed at the level specified in the MOU.


This Amendment and all its attachments are hereby made a part of the MOU.

This Amendment shall become effective as of the date of the final signatory below.

IN WITNESS WHEREOF, the Parties hereto have caused this Amendment to be executed by their proper and duly authorized representatives.

CAREERSOURCE CITRUS LEVY MARION

BY:

  
\_\_\_\_\_

DATE:

3/15/18  
\_\_\_\_\_

DEPARTMENT OF EDUCATION  
DIVISION OF VOCATIONAL REHABILITATION

BY:

  
\_\_\_\_\_  
Pam Stewart, Commissioner of Education

DATE:

4/3/18  
\_\_\_\_\_

**IA-761 A1 – ATTACHMENT I  
INFRASTRUCTURE FUNDING AGREEMENT  
FOR ONE-STOP CAREER CENTER SYSTEM  
BETWEEN THE DEPARTMENT OF EDUCATION AND  
CAREERSOURCE CITRUS LEVY MARION**

**I. PARTIES**

This Infrastructure Funding Agreement (“IFA”), is made pursuant to the Workforce Innovation and Opportunity Act of 2014 (“WIOA”), and is entered into by the Florida Department of Education, Division of Vocational Rehabilitation and Division of Blind Services (hereafter referred to as the Partners) and CareerSource Citrus Levy Marion (hereafter referred to as “CareerSource”).

**II. PURPOSE**

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

The purpose of this IFA is to describe the infrastructure cost responsibilities of the Parties to provide for the maintenance of effective and successful one-stop system. This agreement is intended to coordinate resources and to prevent duplication and ensure the effective and efficient delivery of workforce services in Citrus, Levy, and Marion counties.

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

**III. COST ALLOCATION METHODOLOGY**

CareerSource selected percentage of customer base served as the allocation basis to determine overall Partner contributions. This was done in an effort:

- a) To remedy the imbalance of non-physically represented Partners, and
- b) To comply with the requirement of Partners’ contributions having to be in proportion to the Partners’ use of the one-stop center(s) and relative benefit received.

**IV. PARTNER CONTRIBUTION AMOUNTS**

The following table details in-kind services that will be provided by each partner. The services provided have been identified as on-going costs to the One Stop system. The value of these contributions will be recognized to offset the overall infrastructure expenses of the system.

IFA Agency Budget/Contributions	
Partner	Contribution
Vocational Rehabilitation	Bi-Annual staff training for CareerSource staff
	Provision of marketing collateral to CareerSource
	Coordination/Partnership for employment and training initiatives for mutual customer base
	Provision of staff time for joint business outreach for general services and creation of On the Job training (OJT) and work experience opportunities for individuals with disabilities
	Ongoing consultation to CareerSource for program accessibility within the One Stop Centers
Division of Blind Services	Provision of meeting space as needed for intake and eligibility of referred Voc. Rehab customers
	Bi-Annual staff training for CareerSource staff
	Provision of marketing collateral to CareerSource
	Coordination/Partnership for employment and training initiatives for mutual customer base
	Provision of staff time for joint business outreach for general services and creation of On the Job training (OJT) and work experience opportunities for individuals with visual impairments
	Ongoing consultation to CareerSource for program accessibility within the One Stop Centers
	Provision of meeting space as needed for intake and eligibility of referred Blind Services customers
	Annual review and staff training for appropriate assistive technology located in CareerSource offices

**V. COST RECONCILIATION AND ALLOCATION BASE UPDATE**

All Parties agree that the services and contributions listed in section VI support the One Stop system and its infrastructure cost as a whole, but do not result in physical monetary exchange. All partners agree to meet annually to review and revise the contribution list as deemed necessary to ensure all partners contribute a proportionate share relative to the overall benefit of the system received.

1. Each partner will agree to an appropriate level of contribution through in-kind services provided to the One Stop system to support the above statement.

2. CareerSource will arrange an annual partners meeting to conduct a thorough review of the annual contributions and the MOU as a whole.
3. Partners will communicate any disputes with contribution to CareerSource. CareerSource will resolve any issues through re-negotiating services and costs. Re-negotiation of contributions may occur at any time through mutual agreement of revision of this MOU as described in section X.

#### **VI. STEPS UTILIZED TO REACH CONSENSUS**

The Partners and CareerSource conferred regarding the involvement of each partner at the CareerSource Centers. The appropriate allocation bases were discussed and those bases included in this IFA were agreed upon as the most appropriate. CareerSource proposed the initial Partner Contribution Amounts as described above and the Partners concurred with their proposal. Finally, the parties discussed the best mechanisms by which to review and reconcile actual expenses in the future and agreed to the term included in the Cost Reconciliation and Allocation Base Update section above.

#### **VII. DISPUTE AND IMPASSE RESOLUTION**

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

1. If an issue arises involving this IFA, both parties will make every effort to reach a resolution in a timely and efficient manner. Either partner may request a face-to-face meeting of the local partners to identify and discuss the issue. If resolved and no further action is deemed necessary by the partners, the issue and the resolution will be documented in writing.
2. If not resolved, the issue and the efforts to resolve will be documented and forwarded to the President/CEO of CareerSource and the Director of the Partner organization. A joint decision shall be issued within 60 calendar days of receipt.
3. If dissatisfied with the decision, the dispute may be filed with the State of Florida Department of Economic Opportunity (DEO) and the Commissioner of the Department of Education (DOE) to review concerns and determine resolution. DEO and DOE may remand the issue back to the President/CEO of CareerSource and to the Director of the Partner organization, Partner or impose other remedies to resolve the issue.

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

#### **VIII. MODIFICATION PROCESS**

This IFA may be amended or modified with review and consent of all parties. Amendments and modifications must be issued in writing to all parties and sent certified U. S. Mail. All parties 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.

#### **IX. EFFECTIVE PERIOD**

This IFA will become effective as of the date of signing by the final signatory below and must terminate on June 30, 2020.

**X. PAYMENT METHODOLOGY**

As described in Section V., each partner's contribution will be provided as in-kind services, therefore no payments will be made as a result of this IFA.

**SIGNATURES**

**Department of Education (Partner):**

**CareerSource Citrus Levy Marion:**

 9/10/14  
\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

Pam Stewart, Commissioner of Education

THOMAS E. SISKNER JR  
\_\_\_\_\_  
Printed Name

Date

Date

3/15/18

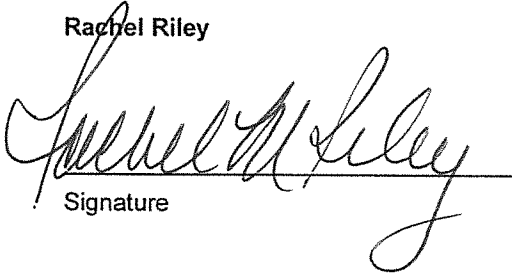
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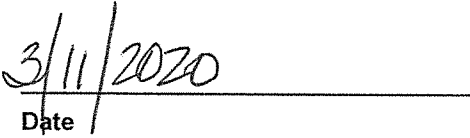
This plan represents the efforts of CareerSource Citrus Levy Marion to implement the Workforce Innovation and Opportunity Act in the following counties: Citrus, Levy, and Marion.

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

**Workforce Development Board Chair**

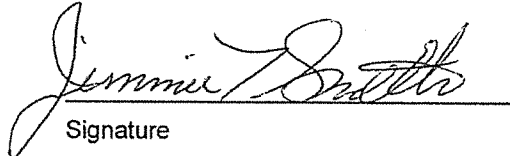
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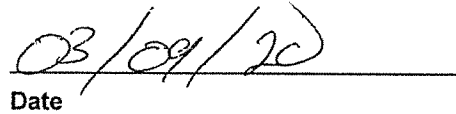
  
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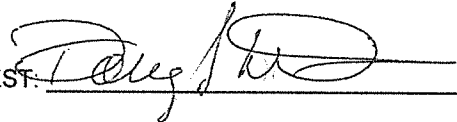
  
Date

**Chief Elected Official**

Jimmy T. Smith

  
Signature

  
Date

ATTEST:   
Signature

**END OF LOCAL PLAN INSTRUCTIONS**