

**CareerSource**  
SOUTHWEST FLORIDA

## **Workforce Innovation and Opportunity Act (WIOA) Local Workforce Plan**

**July 1, 2020 – June 30, 2024**

### **Local Workforce Development Area 24**

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**Date Submitted: March 12, 2020**

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## CONTENTS

<b>PUBLIC COMMENT PROCESS</b>	<b>2</b>
<b>ORGANIZATIONAL STRUCTURE</b>	<b>3</b>
<b>ANALYSIS OF NEED AND AVAILABLE RESOURCES</b>	<b>10</b>
<b>WORKFORCE DEVELOPMENT AREA VISION AND STRATEGIC GOALS</b>	<b>34</b>
<b>COORDINATION OF SERVICES</b>	<b>40</b>
<b>DESCRIPTION OF THE LOCAL ONE-STOP SYSTEM</b>	<b>47</b>
<b>DESCRIPTION OF PROGRAM SERVICES</b>	<b>53</b>
<b>SIGNATURE PAGE</b>	<b>75</b>
<b>ATTACHMENTS</b>	<b>76</b>

## PUBLIC COMMENT PROCESS

- (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)).**

The DRAFT Local Workforce Plan was posted for public comment on the Board's website at [www.careersourcesouthwestflorida.com](http://www.careersourcesouthwestflorida.com), allowing 30 days for public comment. The Public Notice was posted to our Facebook, LinkedIn and Twitter accounts. Paper copies were provided as requested.

- (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)).**

The DRAFT Local Workforce Plan was made available for public comment on December 18, 2019. A thirty (30) day period for public comment was provided. The draft was forwarded to the five Boards of County Commissioners chairpersons and county managers.

- (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)).**

The Notice for Public Comment was advertised in all five counties through the county buildings. The DRAFT Local Workforce Plan was emailed to the five Boards of County Commissioners chairpersons, county managers, local economic development offices and the Southwest Florida Regional Planning Council, allowing sixty (60) days for their comment period, per our Third Amended and Restated Interlocal Agreement for the Southwest Florida Job Training Consortium. All were invited to comment on the draft plan.

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

The DRAFT Local Workforce Plan was emailed to our Board members, which included representatives of businesses and labor organizations, to Partners and to those on the Interested Parties list. This list is maintained to ensure that information is forwarded to stakeholders, partners and the general public. The Board's Program and Planning Committee members also received the draft as they have primary responsibility for oversight and guidance for plan development. The Program and Planning Committee reviewed and discussed the Plan and then made a motion to recommend approval to the Board.

- (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)).**

*Attachment F – Public comments received and changes made.*

## ORGANIZATIONAL STRUCTURE

### (1) Chief Elected Official(s)

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

The Southwest Florida Workforce Development Board, Inc. dba CareerSource Southwest Florida represents Charlotte, Collier, Glades, Hendry and Lee counties. Per our Interlocal Agreement, one of the five chief elected officials of the five respective Boards of County Commissioners (BOCCs) serves as the Chief Elected Official and the "signatory" representative for all five counties for the Southwest Florida Job Training Consortium. Currently, the Chief Elected Official is Commissioner Mitchell Wills, Chairman of the Hendry County Board of County Commissioners (BOCC), P. O. Box 1760, LaBelle, FL 33975-1760, (863) 675-5220, [bocc3@hendryfla.net](mailto:bocc3@hendryfla.net).

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

Attachment C: Third Amended and Restated Interlocal Agreement for the Southwest Florida Job Training Consortium

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

Attachment C: Third Amended and Restated Interlocal Agreement for the Southwest Florida Job Training Consortium

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

Attachment G – Bylaws of Southwest Florida Workforce Development Board, Inc.

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

Page 1, Section 1 of the Bylaws references the Interlocal Agreement which covers the nomination process in detail starting on Page 3, Section C.

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

Page 5, Section 4 of the Bylaws describes term limitations for officers. There are no term limitations for other Board members. Vacancies are filled as they arise; therefore ensuring only a small portion of the membership expires or is vacant at any given time.

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

Page 5, Section 6 of the Bylaws covers vacancies of an office. Page 1, Section 1 of the Bylaws references the Interlocal Agreement which covers presenting nominations for vacancies on Page 3, Section C. Nominations for Board members are received from local business organizations and business trade associations; most often by local economic development offices. The nominations are promptly forwarded by email to the Board of County Commissioners (BOCC) chair or designee from their respective counties for possible appointment.

**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;**

A Board member unable to attend a meeting may send someone to gather information but this person will not serve as a designee, will not be included when determining the number of members needed for a quorum and will not be entitled to vote on a matter under consideration by the Board. As indicated on Page 2, Section 7 of the Bylaws, quorum and voting refers to "appointed directors" only.

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

Page 2, Section 6 of the Bylaws covers use of telecommunications.

**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,**

Page 8, Section 6 of the Bylaws establishes Standing Committees with "duties and functions as specified by the Board" and allows for Ad Hoc committees to be appointed. Board members serve as members of these Standing Committees and Ad Hoc Committees.

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

Bylaws: Page 3, Sections 11-14 address removal, resignation, conflict of interest and financial disclosure.

"Two hat" Board members may satisfy more than one category of the representation required by WIOA.

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

Throughout the year, the Chairpersons of the five Boards of County Commissioners (BOCC) within LWDB 24 are forwarded information pertaining to local Board activities, finances, meetings and issues. They periodically request meetings with the Board

Chairperson, other Board members, the Executive Director or other Board staff to better understand the role of the LWDB. They may also request a meeting to discuss issues or review plans. The draft Plan was emailed to the five BOCC chairpersons, the five county managers and to local economic development offices. All were invited to comment on the draft plan. Each of the chief elected officials (chairs) of our five BOCCs has signed the Interlocal Agreement for the Southwest Florida Job Training Consortium. Although all five received the draft of the Plan and were provided the opportunity for input, these five chairpersons have elected one BOCC chairperson to serve as chief elected official/chairperson of the Consortium and to be the signatory representative for all five counties. Our chief elected official is the chairperson of the Hendry County BOCC. The Commissioner/Chairperson will be asked to sign the Four-Year Local Workforce Plan.

## **(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.**

Mr. Michael P. Jackson, President  
Jackson P.R.  
2513 SE 24th Place  
Cape Coral, FL 33904  
Office: 239-573-9843      Cell: 239-677-7600      E-mail: mj@jacksonpr.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.**

B.J. Brundage  
Deangelis Diamond Construction  
6635 Willow Park Drive  
Naples, FL 34109  
Cell: 239-631-9060      E-mail: bjb@deangelisdiamond.com

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

Throughout the year, Board and Committee members discuss and make recommendations to Board staff regarding programs and services. Board staff incorporated input from the Committee members and Board members in the plan of activities and services for LWDB 24. The DRAFT was emailed to our Board members, which includes representatives of businesses and labor organizations, and to those on the Interested Parties list. This list is maintained to ensure that information is forwarded to stakeholders, partners and the general public. The Board's Program and Planning Committee members received the DRAFT as they have primary responsibility for oversight and guidance for plan development. The involvement of the Board's Program and Planning Committee in the development of the Plan ensures that members had an opportunity to decide locally but within required guidelines, how programs and services are provided in LWDB 24. The Program and Planning Committee members reviewed and discussed the DRAFT Plan at their January 8, 2020 meeting.

The Program and Planning Committee made a recommendation to the Board of Directors to empower the Executive Committee to provide final approval at their February meeting, which allowed additional time for public comment. The Executive Committee approved signature of our Board President in February. The signed Plan was then forwarded to the Chief-Elected Official for signature prior to being submitted to CareerSource Florida.

### **(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 Southwest Florida Workforce Development Board, Inc. doing business as (dba) CareerSource Southwest Florida is the fiscal agent.

**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 Southwest Florida Workforce Development Board, Inc. doing business as (dba) CareerSource Southwest Florida is the administrative entity and will carry out these responsibilities.

**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](#).**

Attachment 3: Request to Extend Designation as a Direct Provider of Workforce Services. CareerSource Southwest Florida is designated as a direct provider of workforce services. Page 2, Part 5 addresses effectiveness of the firewall.

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

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

A Leadership Team, comprised of Board staff (described in detail in Attachment D: Request to Extend Designation as a Direct Provider of Workforce Services) provides oversight for our workforce delivery system while Center Supervisors provide the direct supervision and are responsible for the day-to-day operations and performance outcomes of the One-Stop Centers. This system has proven an effective means of separating oversight from operational activities. The Leadership Team meets at least every other month with the Center Supervisors to work on improving processes.

Staffing levels were developed for front-line staff in the Centers. Our Career Development Representatives (CDRs) may progress along a career ladder based on their knowledge, skills and performance from CDR I to CDR IV. This has allowed for greater integration of services. Integrated program staff has been cross trained to administer Workforce Investment and Opportunity Act (WIOA), Welfare Transition (WT), Supplemental Nutrition Assistance Program (SNAP) and other programs. This integration of the program staff reduces duplication of services and simplifies the process of delivering workforce development services. One-Stop service delivery integrates programs, services, and governance structures. In a Region encompassing 5,449 square miles, the analysis of need indicates that our “system” should have several access centers. The five (5) full-service and two (2) satellite CareerSource Southwest Florida centers are located throughout the Region as follows:

Charlotte County

- 3745 Tamiami Trail, Port Charlotte, 33953

Collier County

- 3050 Horseshoe Drive North, Building A, Suite 110, Naples, 34104
- 750 South 5th Street, Immokalee, 34142

Glades/Hendry Counties

- 215-B South Francisco Street, Clewiston, 33440
- 921 Anvil Circle, Labelle, 33935 (satellite office)

Lee County

- 6800 Shoppes at Plantation Drive, Suite 170, Fort Myers, FL 33912
- 1020 Cultural Boulevard, Cape Coral 33990 (satellite office)

Participating partners vary from Center to Center but may include the Florida Department of Children and Families, the Florida Department of Education’s Division of Vocational Rehabilitation, Department of Economic Opportunity (DEO), the Job Corps recruiter, Goodwill Industries of Southwest Florida, the Senior Community Service Employment Program (SCSEP) provider, the school districts’ Adult Education activities, Florida SouthWestern State College (FSW), Florida Gulf Coast University (FGCU)-Small Business Development Center, Department of Business and Professional Regulations (farm labor), Avow Hospice, Rural Neighborhoods, Immokalee Community Redevelopment Agency, Immokalee Foundation’s Pathways, and the Early Learning Coalitions.

**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.**

At a minimum, all CareerSource Southwest Florida full-service centers are open to customers Monday through Friday, 8:00a.m.-5:00p.m., except on approved holidays. Full-service centers are frequently open evenings and weekends to accommodate businesses and job-seekers. Satellite offices may close from 12:00 pm – 1:00 pm if there is only one person on site.



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

Educational Management and Services FL, LLC (EMS)  
Attn: Dr. Ron Natale, Owner/President  
231 SW Red Maple Way  
Lake City, FL 32024  
Work (386) 438-5858 Cell (478) 342-1118 rnatale@comcast.net

Educational Management and Services FL, LLC (EMS) was selected as the One-Stop Operator for July 2018 through June 2019 with two (2) one-year renewal options at the discretion of the Board. EMS was renewed for the July 2019 through June 2020 program year and again for the July 2020 through June 2021 program year. The Request for Proposals (RFP) process is discussed in Part (4) of the Description of the Local One-Stop System.

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

The Southwest Florida Workforce Development Board, Inc. dba CareerSource Southwest Florida is designated as the direct provider of workforce services through June 30, 2020. A request for a three-year extension of this designation has been posted for public comment and will be forwarded with appropriate signatures upon completion.

**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.**

Under contract with the Southwest Florida Workforce Development Board, Inc. dba CareerSource Southwest Florida, the One-Stop Operator will facilitate coordination of one-stop center partners, including, at a minimum, the following responsibilities:

- Evaluate linkages among one-stop partners with respect to communication and referrals that hinder optimal seamless service delivery; identify deficiencies or gaps in linkages; and recommend strategies for improvement.
- Review Memoranda of Understanding with one-stop partners relating to sharing of information; identify deficiencies or gaps that hinder optimal seamless service delivery; and recommend modifications.
- Identify and recommend practices that encourage the one-stop center partners to provide services to individuals with barriers to employment, including individuals with disabilities who may require longer-term services including intensive employment, training and education services.
- Conduct two site visits to each of the five full-service centers, including interviews with Center Supervisors and direct contact with partners.
- Provide a written report no less than quarterly to the President of the Board. Reports should identify efficiencies and effectiveness related to partner cross-referral processes, in particular, follow-up activities with partners after referral.

- Report in person to the full board at least annually.

CareerSource Southwest Florida will provide Workforce Innovation and Opportunity Act (WIOA) Adult, Dislocated Worker and Youth, Temporary Assistance for Needy Families (TANF), and Supplemental Nutrition Assistance Program (SNAP) services throughout the Region. As noted in (4) A. of this Section, our Leadership Team provides oversight while the Center Supervisors are responsible for the day-to-day operations and performance outcomes, which has proven an effective means of separating oversight from operational activities.

**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.**

All five full-service, comprehensive CareerSource Southwest Florida centers meet the One-Stop Certification requirement.

## 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**

In Southwest Florida overall growth by industries is projected at 12.0% during the period of 2019-2027.

Those industry sectors projected to have growth higher than 12.0% over the period of 2019-2027 are:

- Construction (14.6%)
- Professional and Business Services (14.8%)
- Education and Health Services (16.8%)
- Leisure and Hospitality (13.5%)
- Government (13.6%)

The five high-growth industries (above) are comprised of ten sectors/sub-sectors with extraordinary projected growth of 13.5% and greater:

- Construction
  - 1 - Construction of Buildings (13.5%)
  - 2 - Specialty Trade Contractors (15.3%)
- Professional and Business Services
  - 3 - Professional, Scientific, and Technical Services (17.1%)
  - 4 - Administrative and Support Services (14.0%)
- Education and Health Services:
  - 5 - Educational Services (17.2%)
  - 6 - Ambulatory Health Care Service (19.8%)
  - 7 - Nursing and Residential Care Facilities (14.2%)
  - 8 - Social Assistance (25.1%)
- Leisure and Hospitality
  - 9 - Accommodations and Food Service (14.4%) -
- Government
  - 10 - Local Government (14.5%)

These ten sub-sectors, in 2019, represent 286,014 out of 544,690 total employees throughout Southwest Florida which is almost 53% of the total workforce. This indicates that industry growth spurs workforce opportunities.

One example of industry driving workforce is demonstrated with the current projected growth in local government. During and following the “Housing Bubble” of 2006, local government had double digit decrease in actual and projected growth per Department of

Economic Opportunity (DEO). In the 2008-2016 Industry Projections (DEO), Local Government was recovering with a 2.31% increase over the eight year projection period. The estimated 221,100 new residents (Part 1, A, 3) has increased the need for teachers, public safety workers and healthcare workers in the three coastal counties. (Lee Health, the largest healthcare provider in the region, is part of local government.)

The sub-sectors of Construction (14.6%), Construction of Buildings (13.5%) and Specialty Trade Contractors (15.3%) are projected to have continued growth that equates to more than 7,500 new jobs through 2027.

Industry sub-sectors not represented in the five industries above that are projected to have more than 17.0% growth over the period of 2019-2027 are:

- Manufacturing's Durable Goods
  - Machinery Manufacturing (14.0%)
  
- Trade, Transportation, and Utilities
  - Wholesale Trade -Merchant Wholesalers Durable Goods (13.8%)
  - Retail Trade
    - Building Materials and Garden Equipment and Supplies Dealers (15.8%)
    - Sporting Goods, Hobby, Books, and Music Stores (26.1%)
  - Transportation and Warehousing Sector
    - Transit and Ground Passenger Transportation
    - Support Activities for Transportation
    - Couriers and Messengers
  
- Information
  - Data Processing, Hosting and Related Services (15.9%)
  
- Financial Activities
  - Securities, Commodity Contracts, Other Financial Investments and Related Activities (14.3%)
  - Insurance Carriers and Related Activities (19.2%)

Emerging, in-demand industries projected for Southwest Florida are involved with initiatives in progress or starting in the near future. Over the past few years CareerSource Southwest Florida and its partners in education, economic and business development have focused on:

- a) Manufacturing
- b) Transportation and Warehousing
- c) Professional and Business Services

Many thriving industries in Southwest Florida demonstrate the projected growth in our emerging industries. The international corporate headquarters and manufacturing facility of Arthrex are located in Lee and Collier counties. Arthrex is a global medical device producer and a leader in new product development and medical education in orthopedics. This corporation's growth has fueled growth in the sub-sector of Manufacturing - Durable Goods in Southwest Florida. Arthrex states that more than 90% of their products are manufactured in the United States and exported to more than 100

countries around the world. Only two of Arthrex's manufacturing facilities share this claim - this one located in Collier County, Florida and one in California. The growth of this industry has created the need for workforce in the Advanced Manufacturing sub-sector consequently attracting other manufacturers' interest and relocation to Southwest Florida.

Airglades, a development project, includes the new Airglades International Airport (Hendry County) and has a construction completion date of December 2020 with the estimated costs of four hundred million dollars. This airport will develop a new cargo and perishable goods transportation hub between the U.S. and Central and South America. It will support integrated freight logistics, once operational. Airglades is jointly owned by three parties: Florida Fresh Produce (49%) aka Florida Cargo Fresh; while the remaining 51% is split between U.S. Sugar Corporation and Hilliard Brothers, a diversified agricultural operation.

Cheney Brothers, Inc. (Charlotte County) has a thriving family owned and operated (fourth generation) enterprise as a Florida Food Distributor. Its Southwest Florida facility boasts 200 loading docks and 700 tractor trailers. Cheney Brothers' website reports that it is the fastest growth broadline distributor in the U.S. with annual sales over \$2 billion.

While the corporations noted above are large stakeholders in the sub-sector of Transportation and Warehousing, new businesses continue to emerge. FedEx and UPS have expanded their locations and facilities near Southwest Florida International Airport (Lee County). The business parks in that area include a new Wayfair Distribution Center and an Amazon Fulfillment Center as of July 2019.

Industry leaders representing the Professional and Business Services industry sector and its sub-sectors are:

Gartner, a consulting firm providing technology research to companies worldwide. Their growth in Fort Myers is midway through a five-year expansion in which 600 employees will be added and more than \$20 million invested in capital. There are now more Gartner employees in Southwest Florida than at its corporate headquarters in Connecticut.

ACI Worldwide, a global software development company, currently employing 132 people in Southwest Florida. They anticipate adding 70 employees over the next two years. Small but growing technology companies are abundant throughout Southwest Florida. These include dESCO (FieldEdge) who provides software solutions for service-based companies, as well as, CallMiner and Vectra Digital, who apply cutting-edge artificial intelligence to enhance customer service; Cigent who is a pioneer in providing cyber-security solutions to small and medium-sized businesses; and Fluke Corporation, a software as a service company, who relocated here from New York.

Southwest Florida is also home to call centers providing business process outsourcing. Alta Resources is expected to add 800 jobs and build a \$21 million office building in Southwest Florida. Additional call centers include TZ Insurance, Lynx Services, Alorica and Ace Hardware.

Another important sub-sector within Professional and Business Services is Engineering Services. Major employers include DBI Services, CH2M Hill Engineering, Johnson Engineering; and, AIM Engineering and Surveying.

Continuous Improvement Performance Initiative: CareerSource Florida allows each Local Workforce Development Board (LWDB) to select five industry sectors at the two-digit NAICS code level. These are industries for which additional credit will be received when staff-assisted, high value services are provided in the Business Penetration metric. The industry sectors selected by CareerSource Southwest Florida are identified below:

<b>Industry Title</b>	<b>NAICS Code</b>
Construction	23
Professional, Scientific, and Technical Services	54
Health Care and Social Assistance	62
Transportation and Warehousing	48, 49
Manufacturing	31, 32, 33

The sub-sector of Educational Services (Education and Health Services industry) supports those existing and emerging industries. With the aforementioned projected industry growth, the demand of a highly skilled workforce to meet businesses' needs grows as well. The Glades County Regional Training Center was built when the new construction of the Moore Haven Junior/Senior High School was completed. The two campuses are located less than two mile from each other. The Glades County Regional Training Center houses a Commercial Driving License testing site that is meeting the current logistic workforce needs. It will expand to meet the anticipated demands of the Airglades Project in neighboring Hendry County.

Please see "B" below for complete lists of in-demand occupations (Skilled occupations and the Regional Targeted Occupations List)

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

As noted in the previous text, Southwest Florida industry sector/sub-sectors with the greatest projected growth (greater than 13.5%) for the period of 2019-2027 are:

- Accommodation and Food Services (projected new jobs of 9,346)
- Local Government (projected new jobs of 8,135)
- Specialty Trade Contractors (projected new jobs of 6,169)
- Ambulatory Health Care Services (projected new jobs of 5,975)
- Administrative and Support Services (projected new jobs of 4,454)
- Professional, Scientific, and Technical Services (projected new jobs of 4,244)
- Nursing and Residential Care Facilities (projected new jobs of 1,955)
- Social Assistance (projected new jobs of 1,859)
- Construction of Buildings (projected new jobs of 1,392)
- Building Material and Garden Equipment and Supplies Dealers (projected new jobs of 1,156)
- Merchant Wholesalers, Durable goods (projected new jobs of 1,140)
- Educational Services (projected new jobs of 1,043)
- Insurance Carriers and Related Activities (projected new jobs of 920)

- Sporting Goods, Hobby, Book and Music Stores (projected new jobs of 862)
- Securities, Commodity Contracts, and Other Financial Investments and Related Activities (projected new jobs of 293)
- Support Activities for Transportation (projected new jobs of 235)
- Machinery Manufacturing (projected new jobs of 189)
- Transit and Ground Passenger Transportation (projected new jobs of 184)
- Data Processing, Hosting and Related Services (projected new jobs of 39)

The listed industry sectors/sub-sectors do not represent specific occupations but demonstrate potential growth that affects future workforce needs and opportunities during the period of 2019-2027. With our economic development and educational partners, a highly trained workforce may increase these industries' continued growth and enhance corporate relocations and expansions.

Skilled occupations, those requiring post-secondary educations that are occupations gaining the most new job (2019-2027) related to these high growth industries are:

- Construction Laborers (projected job openings 10,192)
- Carpenters (projected jobs openings of 7,535)
- First-Line Supervisors of Construction Trades and Extraction Workers (projected jobs openings of 5,048)
- Heating, Air Conditioning, and Refrigeration Mechanics and Installers (projected jobs openings of 3,385)
- Maintenance and Repair Workers, General (projected jobs openings of 5,379)
- Plumbers, Pipefitters, and Steamfitters (projected jobs openings of 2,798)
- Electricians (projected jobs openings of 3,657)
- Painters, Construction and Maintenance (projected jobs openings of 5,379)
- Construction Managers (projected jobs openings of 2,127)
- Roofers (projected jobs openings of 2,599)
- Elementary School Teachers, Except Special Education
- Teacher Assistants (projected jobs openings of 2,540)
- Registered Nurses (projected jobs openings of 6,774)
- Nursing Assistants (projected jobs openings of 7,367)
- Medical Assistants (projected jobs openings of 4,074)
- Personal Care Aides (projected jobs openings of 4,247)
- Home Health Aides (projected jobs openings of 2,801)
- Licensed Practical/ Vocational Nurses (projected jobs openings of 2,433)
- Cooks (projected jobs openings of 410,713)
- First-Line Supervisors of Food Preparation and Serving Workers (projected jobs openings of 6,436)
- General and Operations Managers (projected jobs openings of 3,841)
- Customer Service Representatives (projected jobs openings of 11,163)
- Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products (projected jobs openings of 4,437)
- Accountants and Auditors (projected jobs openings of 3,156)
- Management Analysts (projected jobs openings of 2,201)
- First-Line Supervisors of Office and Administrative Support Workers (projected jobs openings of 4,703)

While the occupations noted above are directly related to industry growth throughout Southwest Florida, the following occupations are noted on the 2019 - 2020 Regional Targeted Occupations List and relate to the five projected, high growth industries [and their sub-sectors] of:

1. Construction [Construction of Buildings / Specialty Trade Contractors]
2. Professional and Business Services [Professional, Scientific, and Technical Services / Administrative and Support Services]
3. Education and Health Services [Educational Services/ Ambulatory Health Care Service/ Nursing and Residential Care Facilities/ Social Assistance]
4. Leisure and Hospitality [Accommodations and Food Services]
5. Government [Local Government]

The following are selected occupations from the Southwest Florida 2019-2020 Regional Targeted Occupations List and reflect occupations related to high growth and emerging industries in Southwest Florida. All of these occupations are High Skill/High Wage occupations and require industry-recognized certification. Those occupations listed have a greater than one percent annual growth rate. Some occupations demonstrate demand within Southwest Florida due to local and regional initiatives that were described in earlier text:

- Accountants and Auditors
- Administrative Services Manager
- Aircraft Mechanics and Service Technicians
- Airline Pilots, Copilots, and Flight Engineers
- Architectural and Civil Drafters
- Architectural and Engineering Managers
- Art Director
- Budget Analyst
- Business Operations Specialists
- Business Teachers, Postsecondary
- Career/Technical Education Teachers, Secondary School
- Chemists
- Civil Engineers
- Commercial Pilots
- Compliance Officers
- Computer and Information Systems Managers
- Computer Hardware Engineers
- Computer Network Architects
- Computer Network Support Specialists
- Computer Science Teachers, Postsecondary
- Computer Systems Analysts
- Construction and Building Inspectors
- Construction Managers
- Cost Estimator
- Database Administrators
- Dental Hygienists
- Diagnostic Medical Sonographers
- Dietitians and Nutritionists



- Education Administrators, Elementary and Secondary
- Electrical Engineers
- Elementary School Teachers, Except Special Education
- Financial Analysts
- Financial Examiners
- Financial Managers
- Firefighters
- First-Line Supervisors of Construction Trades and Extraction Workers
- First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers
- First-Line Supervisors of Mechanics, Installers, and Repairers
- First-Line Supervisors of Non-Retail Sales Workers
- First-Line Supervisors of Office and Administrative Support Workers
- First-Line Supervisors of Production and Operating Workers
- First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators
- Food Service Managers
- General and Operations Managers
- Human Resources Managers
- Human Resources Specialists
- Industrial Engineers
- Information Security Analysts
- Insurance Sales Agents
- Kindergarten Teachers, Except Special Education
- Loan Officers
- Logisticians
- Management Analysts
- Market Research Analysts and Marketing Specialists
- Marketing Managers
- Mechanical Engineers
- Medical and Health Services Managers
- Middle School Teachers, Except Special and Career/Technical Education
- Network and Computer Systems Administrators
- Paralegals and Legal Assistants
- Personal Financial Advisors
- Physical Therapist Assistants
- Physician Assistants
- Police and Sheriff's Patrol Officers
- Producers and Directors
- Property, Real Estate, and Community Association Managers
- Public Relations and Fundraising Managers
- Public Relations Specialists
- Radiologic Technologists
- Registered Nurses
- Respiratory Therapists
- Sales Managers
- Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products
- Secondary School Teachers, Except Special and Career/Technical Education

- Software Developers
- Special Education Teachers- Pre-School, Elementary, Middle, Secondary
- Technical Writers
- Training and Development Specialists
- Urban and Regional Planners
- Web Developers

All occupations represented on the Regional Targeted Occupations List are slated for workforce training opportunities to those individuals who meet eligibility criteria. This support provides eligible individuals with an individual training account (ITA) which supports educational and training programs through Southwest Florida's Eligible Training Provider List. The ITA also provides for supplies and equipment as well as other support services. Other training opportunities for individuals interested in the occupations listed above may include, but not limited to: internships, on-the-job training, and customized training.

**(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)).**

Business leaders throughout Southwest Florida require a highly trained staff with industry recognized certifications for each employee. Through our Business Services division information is shared/gathered/provided to businesses, associations, and partners in economic development.

Occupations in-demand related to the high growth and emerging industries require a minimum of post-secondary certifications. The Regional Targeted Occupations List is provided to partners such as: employers, economic developers, chamber of commerce, business associations, educators, and other stakeholders. At least three times per year CareerSource Southwest Florida requests input from all stakeholders concerning those occupations represented on the list. This includes information on adding occupations to meet current and near future local and regional demands in workforce. Any requests for additional occupations are reviewed and data is shared with all stakeholders. This allows CareerSource Southwest Florida and its five comprehensive centers to foresee employer needs and industry trends.

During Leadership meetings each Center Supervisor as well as the Business Services Director discusses contacts with business associates and economic developers. The anticipated local and regional business needs are confirmed and planned for accordingly. While center staff meet with local businesses when listing current job openings or planning hiring events future needs are discussed and reported at center meetings. The specific job knowledge, skills, and abilities as well as job experiences are discussed and shared during center and regional leadership meetings. All data is registered in the Employ Florida system.

The in-demand industry sectors of Construction; Professional and Business Services; Education and Health Services; Leisure and Hospitality; and, Government continue to be monitored/reviewed by the CareerSource Southwest Florida leadership team and partners. Businesses in these industry sectors need the types of services provided through our CareerSource Southwest Florida centers. These service include assistance with On-The-

Job Training (OJT), Customized Training, Work Experience and other training opportunities resulting in industry recognized certifications. Also helpful to businesses are informational events and on-site hiring opportunities.

To further delve into employment needs the Youth Council of CareerSource Southwest Florida is scheduling its second annual "Building Your Future" event at a neighbor center in the Dunbar neighborhood of Fort Myers. These informational events are different from other career fairs in that they encourage businesses to get involved in making youth more aware of the possibilities in the a specific industry through displays and by demonstrating some of the daily activities in that industry. Participating employers included those from construction, healthcare, law enforcement, hospitality and technology.

In an effort to provide services to the Professional and Business Services Industry, CareerSource sought and secured over a half a million dollars in funding to provide skill upgrading of employees and prospective employees. Businesses were surveyed as to their information technology needs of their employees. The initial survey revealed that seven certification needs of IT workers were:

1. Microsoft - MCSE, Server, Office 365, SharePoint, Azure, Windows, power BI, MCNA, .NET
2. Cisco Systems - CCIE, CCNP, CSSP, CCDP, Phone Systems Administration, CISSP, CISP, CREO, CISA, CCNA, CCNE
3. VMware - VCP6-DCV
4. Amazon AWS - AWS Solutions Architect, Solutions Architect- Associate
5. Apple - ACSA, ACMA
6. Adobe (and Adobe Creative Cloud Suite) - Photoshop, InDesign, Illustrator, Dreamweaver (Acrobat X Pro, Dreamweaver, Fireworks, Flash Pro, Flash Builder, InDesign, Illustrator and Photoshop Extended)
7. C++ Institute - CPP, C++

Part (5) F. of the Description of Program Services outlines the efforts provided by CareerSource Southwest Florida and our partners to fill these needs.

Education and Health Services Industry continues to partner with CareerSource Southwest Florida with several initiatives. One examples is with Lee Health, one of the largest employers in Southwest Florida, in partnership with the Southwest Florida Community Foundation to provide training opportunities in high demand occupations throughout the Lee Health system of hospitals and ambulatory care facilities.

CareerSource Southwest Florida provides training opportunities in support of Education. Individual Training Accounts are used with eligible individuals who seek Baccalaureate degrees with Florida SouthWestern State College (FSW) and Florida Gulf Coast University (FGCU) in Kindergarten, Elementary and various Secondary Education certifications. The Charlotte Technical College offers a Teacher Assistant program that result in a Vocational Certification.

The Leisure and Hospitality Industry is greatly supported by CareerSource Southwest Florida with hiring events as well as training opportunities described above. Our educational partners offer a variety of workforce training programs to meet industry needs such as Food Service Managers, Massage Therapists, and Meeting, Convention, and Event Planners. Our partner, FGCU, offers a baccalaureate program in Resort and Hospitality Management while FSW's School of Business and Technology offers College Credit Courses related to Hospitality.

Workforce training opportunities associated with the Government include those occupations that are related to public safety such as Corrections Officers, Police and Sheriff's Patrol Officers, Crossover Correctional Officer to Law Enforcement at the Southwest Florida Public Service Academy. Degree programs (AS/BS) in Criminal Justice are offered at FGCU, FSW and Hodges University.

Our CareerSource Southwest Florida center located in Port Charlotte provides on-going hiring events to the Charlotte Correctional Institution to meet their hiring demands. This center has been the hiring agent for this facility for more than fifteen years.

**(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)).**

Southwest Florida is comprised of a five county area (Charlotte, Collier, Glades, Hendry, and Lee) area of great diversity and talent. The counties of Charlotte, Collier and Lee line the Gulf of Mexico and are the most populous. The counties of Glades and Hendry are interior, rural counties that are expanding workforce opportunities with new initiatives.

Population by Area	2018 Population Estimates as of 07/01/18 (ACS)	2010 Census Total Population
Charlotte County	184,998	159,978
Collier County	378,488	321,520
Glades County	13,724	12,884
Hendry County	41,556	39,140
Lee County	754,610	618,754
LWDB24 - SWFL	1,373,376	1,152,276
Florida	21,299,325	18,801,310
United States	327,167,434	308,745,538

Population estimates indicate population growth in each of the five counties from the Census of 2010 through the Population Estimates of July 2018. This continued growth throughout Southwest Florida contributes to industry growth as well as the growth of the Civilian Employed Population. The American Community Survey (ACS) Population Estimates released on April 23, 2015 for the period of 2010-2014 indicates an overall Civilian Employed Population of 296,865 that swells to 517,328 for the period of 2013-2017.

**Current Labor Force: Table A**

Employment by Industry for Civilian Employed Population 16 Years and Over <small>(2013-2017 ACS 5-Year Estimates)</small>	Charlotte	Collier	Glades	Hendry	Lee	LWDA-24 SWFL	Overall Regional Ranking of Industries LWDA-24
Civilian employed population 16 years and over ((2013-2017 ACS 5-Year Estimates)	59,033	150,802	4,052	16,313	287,128	517,328	Ranking by number of employees
<i>Civilian employed population 16 years and over (2010-2014 ACS, 5-Year Estimates)</i>	33,544	86,034	2,845	9,667	164,775	296,865	
<u><i>Agriculture, forestry, fishing and hunting, and mining:</i></u>	476	5,568	626 [2]	3,808 [1]	2,643	13,121	13
Agriculture, forestry, fishing and hunting	419	5,503	611	3,725	2,359	12,617	subsector
Mining, quarrying, and oil and gas extraction	57	65	15	83	284	504	subsector
<u><i>Construction</i></u>	5,663 [5]	16,025 [5]	272	1,641 [3]	29,737 [5]	53,338	5
<u><i>Manufacturing</i></u>	2,423	4,717	185	1,378 [5]	10,038	18,741	9
<u><i>Wholesale trade</i></u>	1,101	3,069	39	609	6,218	11,036	12
<u><i>Retail trade</i></u>	10,075 [2]	19,266 [4]	549 [3]	1,492 [4]	43,867 [2]	75,249	2
<u><i>Transportation and warehousing, and utilities:</i></u>	2,515	5,528	345 [5]	722	11,888	20,998	8
Transportation and warehousing	1,897	4,670	279	562	10,057	17,465	subsector
Utilities	618	858	66	160	1,831	3,533	subsector
<u><i>Information</i></u>	1,174	2,164	77	87	5,051	8,553	13
<u><i>Finance and insurance, and real estate and rental and leasing:</i></u>	3,880	11,108	74	366	19,715	35,143	6
Finance and insurance	1,993	4,713	56	258	8,763	15,783	subsector
Real estate and rental and leasing	1,887	6,395	18	108	10,952	19,360	subsector

<b><u>Professional, scientific, and management, and administrative and waste management services:</u></b>	<b><u>6,880</u></b> <b>[4]</b>	<b><u>21,398</u></b> <b>[3]</b>	<b><u>290</u></b>	<b><u>1,194</u></b>	<b><u>37,349</u></b> <b>[3]</b>	<b><u>67,111</u></b>	<b><u>4</u></b>
Professional, scientific, and technical services	3,092	10,089	151	467	16,215	30,014	subsector
Management of companies and enterprises	15	75	0	0	262	352	subsector
Administrative and support and waste management services	3,773	11,234	139	727	20,872	36,745	subsector
<b><u>Educational services, and health care and social assistance:</u></b>	<b><u>12,200</u></b> <b>[1]</b>	<b><u>24,270</u></b> <b>[2]</b>	<b><u>710</u></b> <b>[1]</b>	<b><u>2,459</u></b> <b>[2]</b>	<b><u>58,018</u></b> <b>[1]</b>	<b><u>97,657</u></b>	<b><u>1</u></b>
Educational services	4,019	8,228	481	1,185	18,632	32,545	subsector
Health care and social assistance	8,181	16,042	229	1,274	39,386	65,112	subsector
<b><u>Arts, entertainment, and recreation, and accommodation and food services:</u></b>	<b><u>7,082</u></b> <b>[3]</b>	<b><u>24,405</u></b> <b>[1]</b>	<b><u>506</u></b> <b>[4]</b>	<b><u>1,334</u></b>	<b><u>37,119</u></b> <b>[3]</b>	<b><u>70,446</u></b>	<b><u>1</u></b>
Arts, entertainment, and recreation	1,573	6,946	151	287	9,864	18,821	subsector
Accommodation and food services	5,509	17,459	355	1,047	27,255	51,625	subsector
<b><u>Other services, except public administration</u></b>	<b><u>3,106</u></b>	<b><u>9,472</u></b>	<b><u>148</u></b>	<b><u>676</u></b>	<b><u>15,220</u></b>	<b><u>28,622</u></b>	<b><u>7</u></b>
<b><u>Public administration</u></b>	<b><u>2,458</u></b>	<b><u>3,812</u></b>	<b><u>231</u></b>	<b><u>547</u></b>	<b><u>10,265</u></b>	<b><u>17,313</u></b>	<b><u>10</u></b>

The Industry Sectors that employ the most Southwest Floridian are: 1) Educational services, and health care and social assistance; 2) Retail Trade; 3) Arts, entertainment, and recreation, and accommodation and food services; 4) Professional, scientific, and management, and administrative and waste management services; and, 5) Construction.

Because Southwest Florida is a large (5,499 square miles) geographic area, the industry and landscape vary widely and its counties have unique trends. The rural counties of Glades and Hendry employ workers in industry sectors which rank much differently that the coastal counties of Charlotte, Collier and Lee.

The rural counties of Glades and Hendry have an overall civilian employed population of less than 5,000 workers but vary as to the industries in which these workers are employed. In Hendry County the industry sector that employees the most workers is Agricultural, forestry, fishing and hunting and mining. This industry sector ranks second in Glades County. The industry sector of Educational Services; and health care and social assistance ranks first in Glades County but second in Hendry County. Hendry County's population growth has fueled the growth in the Construction industry sector which ranks third but was ranked fourth three years ago. Retail trade industry sector has dropped to fourth place in Hendry County but is ranked third in Glades County. In Glades County the industry sector

of Arts, entertainment, and recreation; and accommodation and food services is ranked fourth by number of employees. The ranking of fifth in Glades County is the industry sector of Transportation and warehousing, and utilities while the industry sector of Manufacturing is fifth (in ranking) in Hendry County.

The labor market trend for these two counties is bright. Manufacturers are targeted by our economic development partners in Hendry County with more businesses slated to open in the near future. The workers will be from the local workforce if the land deal in the Clewiston area (Hendry) goes through because up to 5,000 homes are slated to be built. Thus construction of homes and buildings will thrive. These homes will also support the Airglades project that will be a hub for the transportation of goods from Florida as well as South and Central America. This project will impact the amount of workers in the industry sector of Transportation and Warehousing and utilities in both Glades and Hendry Counties.

In the coastal counties of Charlotte, Collier, and Lee the Civilian Employed Population is 496,963, a great increase of workers from the 284,353 reported in the 2010-2014 ACS, 5-Year Estimates. These workers are represented in the same five industry sectors but the sectors do not rank the same in these counties (table above).

Educational services, health care and social assistance industry sector ranks by number of Civilian Employed Population in first place in both Charlotte and Lee Counties but second place in Collier County. In Collier County the industry sector of Arts, entertainment, and recreation, and accommodation and food services ranks first with the most workers. In both Charlotte and Lee Counties the Retail Trade industry sector ranks in second place while the Arts, entertainment, and recreation, and accommodation and food services sector ranks third in each. Historically the industry sector of Arts, entertainment, and recreation, and accommodation and food services has not been represented in the top five rankings. Recently expansion in the hotels and restaurant as well as the construction of a new resort has spurred growth in this industry sector in Charlotte County. The direct impact is that the industry sector of Construction earns the place of fifth in each Charlotte, Collier and Lee Counties.

When discussing the growth of industry and those occupations as they relate to the sectors of those industries we need to look to those occupations that have maintained our citizens throughout Southwest Florida. The following chart dissects those occupations that are related and the numbers of workers in those sectors per county of Southwest Florida as well as the region and Florida.

<b>Occupation for the Civilian Employed Population 16 Years and Over (2013-2017 ACS 5-Year Estimates)</b>	<b>Charlotte</b>	<b>Collier</b>	<b>Glades</b>	<b>Hendry</b>	<b>Lee</b>	<b>LWDA-24 SWFL</b>	<b>FLORIDA</b>
<b>Civilian employed population 16 years and over</b>	<b>59,033</b>	<b>150,802</b>	<b>4,052</b>	<b>16,313</b>	<b>287,128</b>	<b>517,328</b>	<b>9,018,570</b>
<b><u>Management, business, science, and arts occupations:</u></b>	<b>17,098</b>	<b>46,217</b>	<b>1,125</b>	<b>3,377</b>	<b>87,296</b>	<b>155,113</b>	<b>3,122,128</b>
<b><u>Management, business, and financial occupations:</u></b>	<u>7,378</u>	<u>22,007</u>	<u>551</u>	<u>1,287</u>	<u>37,487</u>	<u>68,710</u>	<u>1,323,087</u>
Management occupations	5,198	16,598	462	1,160	26,866	50,284	909,511
Business and financial operations occupations	2,180	5,409	89	127	10,621	18,426	413,576
<b><u>Computer, engineering, and science occupations:</u></b>	<u>1,414</u>	<u>3,342</u>	<u>61</u>	<u>328</u>	<u>7,854</u>	<u>12,999</u>	<u>371,772</u>
Computer and mathematical occupations	775	1,717	1	188	4,183	6864	204,555
Architecture and engineering occupations	423	1,251	32	85	2,230	4021	119,992
Life, physical, and social science occupations	216	374	28	55	1,441	2114	47,225
<b><u>Education, legal, community service, arts, and media occupations:</u></b>	<u>4,756</u>	<u>12,672</u>	<u>401</u>	<u>1,285</u>	<u>24,945</u>	<u>44,059</u>	<u>874,397</u>
Community and social services occupations	765	2,082	90	126	4,000	7063	127,446
Legal occupations	335	1,915	20	126	3,030	5426	113,961
Education, training, and library occupations	2,638	5,746	276	866	12,942	22,468	463,053
Arts, design, entertainment, sports, and media occupations	1,018	2,929	15	167	4,973	9,102	169,937
<b><u>Healthcare practitioner and technical occupations:</u></b>	<u>3,550</u>	<u>8,196</u>	<u>112</u>	<u>477</u>	<u>17,010</u>	<u>29,345</u>	<u>552,872</u>
Health diagnosing and treating practitioners and other technical occupations	2,337	5,915	36	423	11,345	20,056	365,886
Health technologists and technicians	1,213	2,281	76	54	5,665	9,289	186,986
<b>Service occupations:</b>	<b>13,160</b>	<b>36,497</b>	<b>647</b>	<b>2,230</b>	<b>62,428</b>	<b>114,962</b>	<b>1,832,577</b>
<b><u>Healthcare support occupations</u></b>	<u>2,373</u>	<u>2,746</u>	<u>9</u>	<u>268</u>	<u>7,525</u>	<u>12,921</u>	233,014



<b><u>Protective service occupations:</u></b>	<u>1,334</u>	<u>2,335</u>	<u>114</u>	<u>187</u>	<u>6,230</u>	<u>10,200</u>	228,344
Firefighting and prevention, and other protective service workers including supervisors	667	1,323	16	47	3,671	5724	136,581
Law enforcement workers including supervisors	667	1,012	98	140	2,559	4476	91,763
<b><u>Food preparation and serving related occupations</u></b>	<u>4,384</u>	<u>13,982</u>	<u>349</u>	<u>547</u>	<u>20,319</u>	<u>39,581</u>	<u>610,947</u>
<b><u>Building and grounds cleaning and maintenance occupations</u></b>	<u>3,276</u>	<u>12,128</u>	<u>142</u>	<u>859</u>	<u>19,119</u>	<u>35,524</u>	<u>452,696</u>
<b><u>Personal care and service occupations</u></b>	<u>1,793</u>	<u>5,306</u>	<u>33</u>	<u>369</u>	<u>9,235</u>	<u>16,736</u>	<u>307,576</u>
<b>Sales and office occupations:</b>	<b>17,105</b>	<b>36,300</b>	<b>1,037</b>	<b>3,105</b>	<b>79,552</b>	<b>137,099</b>	<b>2,406,985</b>
<b><u>Sales and related occupations</u></b>	<u>8,510</u>	<u>19,637</u>	<u>265</u>	<u>1,451</u>	<u>41,461</u>	<u>71,324</u>	<u>1,145,415</u>
<b><u>Office and administrative support occupations</u></b>	<u>8,595</u>	<u>16,663</u>	<u>772</u>	<u>1,654</u>	<u>38,091</u>	<u>65,775</u>	<u>1,261,570</u>
<b>Natural resources, construction, and maintenance occupations:</b>	<b>7,168</b>	<b>20,401</b>	<b>697</b>	<b>5,217</b>	<b>33,986</b>	<b>67,469</b>	<b>829,789</b>
<b><u>Farming, fishing, and forestry occupations</u></b>	<u>353</u>	<u>4,824</u>	<u>216</u>	<u>3,052</u>	<u>1,432</u>	<u>9877</u>	<u>58,198</u>
<b><u>Construction and extraction occupations</u></b>	<u>4,251</u>	<u>11,453</u>	<u>274</u>	<u>1,328</u>	<u>22,173</u>	<u>39,479</u>	<u>471,172</u>
<b><u>Installation, maintenance, and repair occupations</u></b>	<u>2,564</u>	<u>4,124</u>	<u>207</u>	<u>837</u>	<u>10,381</u>	<u>18,113</u>	<u>300,419</u>
<b>Production, transportation, and material moving occupations:</b>	<b>4,502</b>	<b>11,387</b>	<b>546</b>	<b>2,384</b>	<b>23,866</b>	<b>42,685</b>	<b>827,091</b>
<b><u>Production occupations</u></b>	<u>1,870</u>	<u>3,987</u>	<u>123</u>	<u>1,036</u>	<u>7,870</u>	<u>14,886</u>	<u>305,322</u>
<b><u>Transportation occupations</u></b>	<u>1,557</u>	<u>4,484</u>	<u>366</u>	<u>931</u>	<u>10,572</u>	<u>17,910</u>	<u>340,350</u>
<b><u>Material moving occupations</u></b>	<u>1,075</u>	<u>2,916</u>	<u>57</u>	<u>417</u>	<u>5,424</u>	<u>9,889</u>	<u>181,419</u>

The occupations of 517,328 Southwest Floridians are grouped within the major categories (light gray) of:

- Management, Business, Science, and Arts
- Service
- Sales and Office
- Natural Resources, Construction, and Maintenance
- Production, Transportation, and Material Moving

The occupation group of management, business, science and art employed the most Southwest Floridians, 155,113. Followed by the occupation group of sales and office with 137,099; Service with 114,962; natural resources, construction, and maintenance with

67,469; and, production, transportation, and material moving with 42,685 people employed throughout the region.

In Lee County the workers, 287,128 individuals, account for almost 56% of Southwest Floridians for this period and reflect the trend of workers by occupation groupings. Collier County has 150,802 individuals and reports more workers in the service occupations than the sales/office occupations. Charlotte County has 59,033 individuals and reports the ranking of sales/office occupations with the most workers followed by management, business, science, and art then service occupations. All three counties have the natural resources, construction, and maintenance occupations ranked fourth with the production, transportation and material moving occupations in fifth place.

Southwest Florida's rural counties, Glades and Hendry are unlike the coastal counties of Charlotte, Collier and Lee. In Hendry County the Natural Resources, Transportation and Material Moving occupations are ranked in first place followed by the Management, Business, Science and Arts, then Sales and Office occupations. Hendry County is home to U.S. Sugar, and ESG Company which are large agricultural corporations. Clewiston is the location of the world headquarters of U.S. Sugar impacting the Management, Business, Sales and Office occupations.

In Glades County, the Management, Business, Science and Arts occupations lead in the occupation rank followed by Sales and Office occupations. Although Glades County is considered an agricultural area, many farms are egg farms, which are considered management and sales of the product. As well this occupational grouping includes an educational and healthcare occupation which impacts this ranking. The occupational grouping of Natural Resources, Construction, and Maintenance follows in third place. Having Moore Haven, the county seat, located along Lake Okeechobee and Caloosahatchee shores, many businesses include cattle farming and eco-tourism.

Glades and Hendry Counties have the least amount of citizens working in the Service Occupations and Production, Transportation, and Material Moving Occupations. With current initiatives, Glades Regional Training Center and Airglades occupational trends are anticipated to shift with growth in occupations within these two groups.

The occupation group tells us where we have been during this five year reporting period while the projections try to tell us where we may be in the next eight year period. The effects of economic development, natural disasters, unforeseen financial phenomenon, and, local and regional initiatives impact workforce demands and development.

While Florida Department of Economic Opportunity projects high growth in Construction (14.6%); Professional and Business Services (14.8%); Education and Health Services (16.8%); Leisure and Hospitality (13.5); and, Government (13.6%) through 2027, many initiatives are in the future for Southwest Florida. Our partners in economic development, education, government in our counties and region wide are joining together in initiatives to address the emerging industries of Manufacturing; Transportation and Warehousing; and, the Professional and Business Services' sub-sector of Administrative Support Services.

Our economic development partners agree with our reporting of the emerging industries noted above but include several focus areas due to commitment to specialized projects that are part of the growing industry sub-sectors.

- Manufacturing
- Logistics, Transportation and Warehousing
- Professional Scientific and Technical Services
- Aviation, Aerospace, and Airport Services
- Clean Energy and Sustainable Solutions
- Construction
- Corporate Headquarters
- Destination and Entertainment
- Headquarters and Back Office Support
- Information Technology and Financial Tech
- Life Sciences and Healthcare
- Maritime
- Agriculture and Agribusiness
- Accommodation/Resort Tourism
- Wholesale Trade
- Healthcare/Hospitals and Senior Living
- Financial Services

Earlier in this Section, the Airglades project was more thoroughly described in Part (1) A. and it is noted that it will have a great impact in the Hendry County and surrounding rural areas of Glades and Collier Counties. While Hendry and Glades counties are strong in the agricultural/ farming and agribusiness occupations, the Airglades will grow the trade/transportation and management, business and sales/ office occupations. The demand for occupations related to aviation, logistics, materials moving, financial and information technology are on the horizon while the immediate impact will be on construction and production related occupations. As the businesses and immediately surrounding communities grow, the service occupations will follow in growth.

Another far-reaching initiative is the Captains for Clean Water and the Water School at Florida Gulf Coast University (FGCU). Governor DeSantis has joined the regional efforts to address our precious natural resources of the waters of the Gulf of Mexico, Caloosahatchee River, Charlotte Harbor, Peace River and Lake Okeechobee. While the Captains for Clean Water spearheaded the call for action, the businesses related to hospitality and tourism have thrown their influence and financial resources into the project.

Allegiant Airlines has committed to this project with the construction of its SunSeeker Resort in the Charlotte Harbor. Its airline utilizes the Punta Gorda (PGD) Airport as a destination travel facility; thus adding to the transportation and service occupations of the region. While this “Clean Water” initiative has just begun, support and partnerships have strengthened to assure continued environmental and economic well-being.

The Army Corps of Engineers has begun the Lake Okeechobee Reservoir Project that is slated to last for a decade. The Hoover Dikes of the Lake are in much needed repair and reconstruction to address breaches and allow for the appropriate water levels in the lake. Many citizens and businesses along the Caloosahatchee River and along in the coastal counties are very supportive.

The workforce requirements in these initiatives will be addressed by working with partners who offer workforce education and training in the health sciences, sustainability, and clean technologies. Besides the Water School at FGCU, Florida SouthWestern State College has

introduced a water management program. The coastal technical colleges are researching natural resource programming such as water management and solar panel technology since Southwest Floridians are advocating for the protection of our natural resources.

Southwest Florida continues to have a robust economy with low unemployment. The region continues to be at the same rate or lower than Florida and the United States. That is due to Lee County having significantly lower unemployment and the majority of workers in the five county region. Southwest Florida continues to have a low unemployment rate as observed in the following chart. This chart reflects the most recent State of Florida Local Area Unemployment Statistics By County (not seasonally adjusted) and reflects a regional workforce that includes both full and part-time workers as:

	October 2019		September 2019		October 2018		September 2018	
Area	Labor Force	UnEmpl Rate	Labor Force	UnEmpl Rate	Labor Force	UnEmpl Rate	Labor Force	UnEmpl Rate
Charlotte	72,353	3.3%	72,009	3.5%	71,114	3.8%	70,611	3.9%
Collier	181,234	2.9%	178,188	3.2%	176,782	3.3%	173,402	3.5%
Glades	5,644	3.5%	6,080	3.9%	5,340	3.6%	5,031	4.0%
Hendry	16,205	5.8%	15,524	7.1%	15,934	5.7%	15,214	7.0%
Lee	356,622	2.8%	354,616	2.9%	343,976	3.2%	341,300	3.2%
<b>SWFL</b>	<b>632,058</b>	<b>3.0%</b>	<b>626,417</b>	<b>3.2%</b>	<b>613,146</b>	<b>3.4%</b>	<b>605,558</b>	<b>3.5%</b>
FL	10,565,000	3.2%	10,532,000	3.2%	10,305,000	3.3%	10,267,000	3.3%
US	164,576,000	3.6%	163,943,000	3.3%	162,723,000	3.5	162,055,000	3.6%

Hendry County continues to be plagued with high unemployment although recently we celebrate that it is under 6%. The introduction of several manufacturing businesses in the LaBelle area has reduced the areas unemployment rate from the highest in the State of Florida for several years. We continue to partner with our economic development partners to attract small enterprises to this rural area/ county.

One issue affecting this specific area and all rural areas of Southwest Florida is underemployment and those individuals who have discontinued seeking employment. CareerSource Southwest Florida along with its partners continues to seek educational and business development on the eastern side of Interstate 75 and throughout the rural areas of Collier, Glades and Hendry Counties.

Noted in earlier text was the description of the Glades Regional Training Center which has the goal to provide technical education programs in the Moore Haven/Clewiston area. We partner with Hendry Adult and Career Education so opportunities in the Clewiston Adult Education Center continue to thrive and grow.

For some affected by underemployment or joblessness there is a lack of workforce skills and/or those resources that support employment such as reliable transportation to the geographic areas where job openings are located; reliable and affordable childcare; and the resources for a successful job seeking experience. CareerSource Southwest Florida continues to partner with community based organizations in areas of greater unemployment/underemployment. We attend partner meetings to address local needs and

to inform partners of resources, whether on-line or at one of our five comprehensive centers or two satellite offices. Due to the large geographic area of Southwest Florida this continues this continues to be a weakness. Please note that the land mass of 5,499 square miles is equivalent to the land mass of Connecticut - the third smallest state of the country.

**(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)).**

Through the strategically located full-service centers and satellite offices, access is provided to employment services, workshops and occupational training. Support services are made available through Board resources and those of our partners. CareerSource Southwest Florida has a history of strong partnerships with local business and educators. Board and Center staff works with local economic development organizations to assist new and growing businesses. Matching the skills of the local workforce with the needs of employers continues to be challenging. Key education partners are the five school districts' Career and Technical Education (CTE) departments, Florida SouthWestern State College, Florida Gulf Coast University (FGCU) and the private, non-public educators which serve our individuals and businesses. CareerSource Southwest Florida provides businesses varied opportunities that may include: On-The-Job Training (OJT), Customized Training, Work Experience and training opportunities resulting in industry recognized certifications. Hiring and informational events are provided on-site or center based to meet need and demands.

A recent example of the relationships addresses the Comprehensive Local Needs Assessment (CLNA) requirements for the Perkins V Transition Plan. Initially, the five representatives of the local school districts met with CareerSource Southwest Florida planning staff members to discuss a collaborative agreement and plan. CareerSource staff provided current workforce data and resources to these partners to foster a strong combined plan for the technical colleges, along with FSW. Our educational partners were well equipped for discussion when meeting with statewide colleagues and representatives of the Florida Department of Education. CareerSource Southwest Florida has committed to providing data, resources and business representation in this joint effort to "Strengthen Career and Technical Education for the 21st Century Act (Perkins V)".

Private colleges and universities with campuses in our Local Workforce Development Area (LWDA) include Nova Southeastern University, Hodges University, Rasmussen College, Keiser University, Premiere International College and Southern Technical College. Along with these institutions, many workforce training partners round out the Eligible Training Provider List of CareerSource Southwest Florida.

<b>County</b>	<b>Technical College Campuses</b>	<b>State College</b>	<b>State University</b>
Charlotte	Charlotte Technical Center	Florida SouthWestern (FSW) campus in Punta Gorda	None
Collier	Lorenzo Walker Technical College and Immokalee Technical College	FSW - campus in East Naples	None
Glades	None (Glades Regional Training Center)	None	None
Hendry	None	FSW campus in LaBelle	None
Lee	Cape Coral Technical College and Fort Myers Technical College	FSW Main Campus	Florida Gulf Coast University
LWDA - 24	Five (5)	One (1) with three satellite campuses	One (1)

All occupations represented on the Regional Targeted Occupations List are slated for workforce training opportunities to those individuals who meet eligibility criteria. This support provides eligible individuals with an individual training account (ITA) which supports educational and training programs through Southwest Florida's Eligible Training Provider List. The ITA also provides for supplies and equipment as well as other support services. Other training opportunities for individuals interested in the occupations listed above may include, but not limited to: internships, on-the-job training, and customized training.

Our Program and Planning Committee monitors occupational training programs included on the Eligible Training Provider List (ETPL) to assure those skills attained from the training curriculum meet or exceed the local employers' workforce needs. We work together with our education and economic development partners to meet the anticipated needs of growth and emerging industries. The Business Services Division will continue its efforts with employers to meet their specific needs for greater numbers of employees in high-demand occupations.

Our online Inquiry Form at [careersourcesouthwestflorida.com](http://careersourcesouthwestflorida.com) assists with the eligibility assessment process. Key staff at each center contact individuals to assess needs. See Parts (5) and (6) in this Section concerning the process for assessing for need of services and eligibility. Assessment is also discussed throughout the Plan in areas pertaining to coordination of services. All of these coordinated efforts have strengthened partnerships and helped to reduce duplication.

To meet the Construction Industry needs CareerSource sought and received funding to spur growth in Apprenticeship. This opportunity was originally slated for citizens in the rural areas focusing on the Masonry Apprenticeship Program but required revision. Currently CareerSource Southwest Florida is partnering with the Donna J. Beasley Tri-County Apprenticeship Academy. The sponsoring employers are located in the urban areas with all classroom activities being held in Fort Myers. This program focuses on the specialty contractor industry sub-sector with choices in electricity, pipe fitting, and plumbing.

**(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)).**

Career services and resources offered through the One-Stop delivery system are available and provided to individuals who meet eligibility requirements for those services. Services may be offered onsite at the One-Stop centers and satellite offices, by telephone and/or electronically. The combination of funds from Wagner-Peyser, TANF, WIOA, and funds from other One-Stop partners results in an expanded level of available services to eligible individuals. Services will primarily include:

- Eligibility determinations;
- Outreach, intake including worker profiling, and orientation to the One-Stop system;
- Initial assessment of skill levels and supportive service needs;
- Job search and placement assistance, and career counseling;
- Referrals to other programs and services and coordination of these activities;
- Provision of local labor market information to include job vacancies, demand occupations, wages, job skills needed, and opportunities for advancement;
- Provision of information on:
  - eligible training providers' programs to include performance and costs (per program),
  - eligible providers of youth workforce services and activities,
  - providers of adult education,
  - providers of career and technical education activities at the postsecondary level,
  - career and technical education activities available to school dropouts,
  - providers of vocational rehabilitation services,
  - how the local area is performing on performance accountability measures,
  - availability of supportive services or assistance and referral, as appropriate,
  - filing claims for unemployment compensation (Reemployment Assistance);
- Assistance with eligibility for non WIOA funded financial aid for education;
- Development of individual employment plan;
- Group counseling;
- Individual counseling;
- Career planning;
- Short term pre-vocational services;
- Internships and work experiences that are linked to careers;
- Workforce preparation activities;
- Financial literacy services;
- Out-of-area job search assistance and relocation assistance;
- English language acquisition and integrated education and training programs; and,
- Follow-up services.

When determined necessary, appropriate and in compliance with the WIOA, eligible Adults and Dislocated Workers are referred to Eligible Training Providers' approved programs for occupational training. In consultation with a Career Development Representative (CDR), a participant will select the program most desired according to such factors as costs within established guidelines, geographic location, potential for successful completion, suitability, and scheduling considerations. In addition to ample training opportunities with eligible providers in Local Workforce Development Area (LWDA) 24, Individual Training Accounts are used for training with providers in other areas of the state, primarily in contiguous LWDA's.

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

Youth programs and activities are promoted widely throughout the five counties. Youth investment activities support youth and young adults through an integrated service delivery system that includes occupational skills exploration, pre-employment/work maturity skills training, counseling, opportunities for academic skill building, GED preparation, job development, work experience, summer youth employment, on-the-job training, job placement, and follow-up. Youth programs offer the Program Elements outlined in the WIOA:

- Tutoring, study skills training, instruction, and evidence-based dropout prevention and recovery strategies that lead to completion of the requirements for a secondary school diploma or its recognized equivalent (including a recognized certificate of attendance or similar document for individuals with disabilities) or for a recognized postsecondary credential. Note – Florida no longer issues certificates of attendance. We will assist students within the parameters of the new “Florida 24 Credit Standard Diploma High School Graduation Options” developed for students entering 9th grade in 2014-15 and after. The new standard offers three possible 24 credit standard diploma options; 1) available to all students, including students with disabilities, 2) with academic and employment requirements, available only to students with disabilities, and 3) available only to students with significant cognitive disabilities, who take access courses and the alternate assessment.
- Alternative secondary school services, or dropout recovery services;
- Paid and unpaid work experiences that have as a component academic and occupational education, which may include -
  - (i) summer opportunities and other employment opportunities available throughout the school year;
  - (ii) pre-apprenticeship programs;
  - (iii) internships and job shadowing; and
  - (iv) on-the-job training opportunities;
- Occupational skill training which shall include priority consideration for training programs that lead to recognized postsecondary credentials that are aligned with in-demand industry sectors or occupations in the local area involved, if the local board determines that the programs meet the quality criteria described in section 123 of the WIOA;
- Education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster;
- Leadership development opportunities;
- Supportive services;
- Adult mentoring for the period of participation and a subsequent period, for a total of not less than 12 months;
- Follow-up services for not less than 12 months after the completion of participation, as appropriate;
- Comprehensive guidance and counseling;
- Financial literacy education;
- Entrepreneurial skills training;



- Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services; and
- Activities that help youth prepare for and transition to postsecondary education and training.

One of our most successful models of youth workforce investment activities is Destination Graduation, which is a comprehensive mentoring and academic assistance program. In collaboration with the school districts this project provides intensive drop-out prevention services to WIOA-eligible, in-school youth. The goal is to decrease the high school drop-out rates. These students are provided mentoring, homework assistance, peer tutoring, fun after-school opportunities, summer employment opportunities, employability skills training, career development, life skills development, field trips, guest speakers, parent involvement and other activities and services. Results to date show higher grade point average and a much higher graduation rate. Since its inception in 2009, Destination Graduation has grown from two schools to fifteen. Staff is continuing to seek grant funding to continue and perhaps expand the program to all high schools within the five-county area.

Destination Career\$ is a result of the successful Destination Graduation model. Destination Career\$ is a comprehensive mentoring program for Out-of-School youth throughout Southwest Florida. Each youth, along with their mentor, builds an individualized plan starting with the Student Cooperative Agreement. This agreement guides the youth through their iCareer pathway to success through educational and workforce activities. This program began in July of 2016 and continues to build stronger relationships with our community and educational partners. Those youth who are interested and participate in Destination Career\$ have multiple barriers and require guidance for educational attainments to support their career plans. Mentors/Career Development Representatives of Destination Career\$ provide access to quality education and job opportunities through guidance, continuous support in educational attainment, and opportunities for skills training in high-demand industries and occupations. All these activities culminating with workplace experience that result in a great job along their career pathway and/or enrollment in continued post-secondary education. Career pathway may include work-based learning via work experience, job shadowing, internships, short-term occupational skills and on-the-job training experiences.

iCareer is a web-based program ([careersourcesouthwestflorida.com/icareer-program/](http://careersourcesouthwestflorida.com/icareer-program/)) available to all. As the webpage explains: The iCareer program is designed to assist job seekers develop individualized career plans – your iCareer – that will outline a person’s individual career path, provide a way-forward for acquiring the skills needed to start in an in-demand career, and to define the rungs on the career ladder that will take that person to a high skill/high wage future. Another program which has just been started locally includes Metrix Learning Soft Skill Cluster Courses. These include a common curriculum of soft skill training, as well as, soft skill industry path courses specific to an industry. These courses are combined with locally provided employability skills activities and workshops. The Metrix Learning My Plan Pathway work skill courses provide the opportunity to 1) select an industry path and occupation linked to a career goal; 2) complete a simple skill gap assessment; and 3) review and assign work skill courses recommended to assist with overcoming skill gaps. Both the iCareer program and the Metrix are particularly helpful with youth populations.

In-School and Out-of-School Youth with disabilities are offered the same services and activities. All youth are assessed and accommodations provided on an individual basis.

Most often identified are youth with learning disabilities. Staff may utilize the iCareer service delivery model to assist youth in designing a career path and acquiring in-demand skill sets in an occupation of interest and identify future career ladder opportunities

As noted in this Section under Part (2), the Youth Council of CareerSource Southwest Florida is holding its second annual information fair at a neighbor center in the Dunbar neighborhood of Fort Myers. This event, "Building Your Future" was very successful last year with more than a dozen businesses involved. Participating employers included those from construction, healthcare, law enforcement, hospitality and technology. These events are different from other career fairs in that they encourage businesses to get involved in making youth more aware of the possibilities in a specific industry through displays and by demonstrating some of the daily activities in the industry. Many employers plan to return to participate in the next upcoming hiring and informational event.

## WORKFORCE DEVELOPMENT AREA VISION AND STRATEGIC GOALS

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

The vision of CareerSource Southwest Florida is to be the local lead organization to provide workforce resources to businesses and individuals.

The mission of CareerSource Southwest Florida is to initiate and support effective strategies through collaboration with business, education, and social services to facilitate the development of programs and activities that reduce dependency, encourage personal growth, and provide economic benefits to individuals, businesses, and communities of Southwest Florida.

CareerSource Southwest Florida has assigned the oversight and monitoring of programmatic services to its Service Delivery Committee. The committee reviews its responsibilities as outlined by CareerSource Florida and has revised its own goals and responsibilities to include the following elements:

- Uses monitoring to ensure that both businesses and job seekers advance the economic viability of the Region by developing a quality workforce.
- Reviews performance of workforce programs.
- Evaluates Center operations including services, resource rooms, customer service, programs, etc.
- Special assignments such as review of Board member attendance.

The Service Delivery Committee reviews programmatic achievements and challenges annually. The Center Supervisors periodically present to the Service Delivery Committee with input from Board staff. Discussion of best practices and achievements prepare the committee members to set future goals and priorities.

**(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.**

CareerSource Southwest Florida has a history of strong partnerships with local business, educators and other partners. Representatives of the core programs will share information to develop a better understanding of each other’s programs and services. This will provide a seamless continuum of services for customers and will serve to reduce duplication. Ultimately the goal of the core partners is to assist customers in becoming self-sufficient and productive. We will continue to align our programs and ensure business and individual customers are aware of the full array of available services.

As noted in Part (1) of Coordination of Services, the Center Supervisors hold partner meetings with decision makers to discuss policies and procedures and hold staffing meetings with front-line staff to discuss common customers. We will continue to align our programs and ensure business and individual customers are aware of the full array of available services.

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

A One-Stop Leadership Team was developed to provide oversight for our workforce delivery system while Center Supervisors provide the direct supervision and are responsible for the day-to-day operations and performance outcomes of the One-Stop Centers. The Leadership Team meets at least every other month with the Center Supervisors to work on improving processes.

The Board's Service Delivery Committee developed a strategy with measurable outcomes on how to target the Universal Customer. The Programs Division then wrote Center goals and expectations, to include the following:

- A. WIOA Adults, Dislocated Workers and Youth: Increase Employed and Credentialed at Exit.
- B. Welfare Transition Program (WTP) and Supplemental Nutrition Assistance Program (SNAP): Increase the co-enrollment with WIOA and WTP for training and job placement assistance.
- C. Wagner-Peyser (WP): Increase targeted populations served that exit with employment. (Formerly incarcerated, Homeless individuals, Individuals with Disabilities, Reemployment Assistance Claimants, SNAP/WT recipients, and Veteran)
- D. WP and WIOA: Ensure follow-along services to assist customers with employment needs are offered in a timely manner, when applicable.

Each of the goals was established with an objective, historical data and an action plan for each of the five full-service centers. This along with the Service Delivery Committee's oversight of performance will continue to keep CareerSource Southwest Florida performing at high levels.

**(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.**

With a successful Disability Navigator Program, the Centers are better prepared to assist individuals with disabilities in accessing the services they need. Since retirement of our Disability Program Navigator (DPN), we have begun provision of training for another staff person has been determined suitable to perform Ticket-to-Work activities, and is in the process of completing the necessary training. The DPN will field regional customer inquiries from staff, partners and community agencies. Each center has a Disability Specialist who serves as a triage point for the center and a point of contact for the DPN. The Regional Trainer and the DPN extracted highlights from "Access for All: A Resource Manual for

Meeting the Needs of One-Stop Customers with Disabilities,” and have finalized a staff training curriculum. Assistive technology devices have been made available to include additional licenses & upgrades for Zoom text/JAWS and UbiDuo, a dual keyboard with LCD monitor. Staff is more knowledgeable and able to work with the customer in creating an appropriate Employment Development Plan.

As described in Part (1) of Coordination of Services, partner meetings are facilitated by each of our Center Supervisors. These meetings include representation from Vocational Rehabilitation, Blind Services, AARP’s Senior Community Service Employment Program (SCSEP), Job Corps, school districts’ adult education programs, and technical colleges.

The Equal Opportunity (EO) Officer investigates all grievances regarding and allegations of discrimination based on race, color, sex, national origin, disability, age, citizenship, political affiliation, beliefs, genetic information or marital status. If an individual has a complaint regarding level of services or customer service Region 24’s policy is to try and resolve the issue at the lowest level. As per policy a complaint will first be entertained to the Center Supervisor level and if not mutually resolved to the customer’s satisfaction they are afforded the opportunity to submit the grievance in writing to the Programs Division Director for further investigation. To better meet the needs of other protected groups, the EO Officer has developed curriculum that includes interpretive services, complaint procedures, reasonable accommodations and social media guidelines. The training is provided during onboarding to ensure new staff is aware of the proper procedures regarding grievances and complaints. The EO Officer will also conduct training regarding the different avenues in which a grievance or complaint may be filled.

The Inquiry Form, discussed in Part (1) of Coordination of Services, has the potential to assist individuals with disabilities in accessing our services. The Inquiry Form allows customers to connect directly with Center staff via our website.

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

The mission of CareerSource Southwest Florida was developed through a strategic planning session of Board members, Committee members and Board staff. Goals and responsibilities were developed by the Board and are periodically updated by the Service Delivery Committee. The Center goals were developed during monthly Programs Division meetings. These meetings include the Programs Division Director, Quality Assurance Program Managers, Center Supervisors, the Department of Economic Opportunity (DEO) Operations and Management Consultant II, DEO Employment Security Representatives and may include Customer Development Representative IVs.

**(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)).**

The CareerSource Southwest Florida centers’ localized goals as discussed in Part 3 of this Section address the federal measures.

- A. Action Plan for the first goal, “WIOA Adults, Dislocated Workers and Youth: Increase Employed and Credentialed at Exit” includes:

- Center Supervisors/Career Development Representatives (CDR) IV will review and approve all WIOA exits proposed by CDR IIs & IIIs.
  - Review staff will enter a case note in the EmployFlorida (EF) system to document case has been reviewed and approved for exit based on information provided. Review will examine evidence of employment and/or credential attained (when applicable).
  - CDRs will collaborate with Employment Security Representatives (ESR)/DVOP staff on job placement assistance for WIOA customers.
- B. Action Plan for the second goal, “Welfare Transition Program (WTP) and Supplemental Nutrition Assistance Program (SNAP): Increase the co-enrollment with WIOA and WTP for training and job placement assistance” includes:
- CDRs will review all options available to customers and note blended services in EF to document the array of services offered. Note will include a reason why customer was not co-enrolled in WIOA, if applicable.
  - Peer reviews will be conducted quarterly to compare the number of mandatory WTP/SNAP customers co-enrolled in WIOA. Report to be submitted to the Programs Division Director by the 15th business day of the month following the end of each quarter.
- C. Action Plan for the third goal, “Wagner-Peyser (WP): Increase targeted populations served that exit with employment” includes:
- CDRs, DVOPs and ESRs will collaborate to increase the number of:
    - Formerly Incarcerated
    - Homeless Individuals
    - Individuals with Disabilities
    - Reemployment Assistance Claimants
    - SNAP/WTP recipients
    - Veterans
- E. Action Plan for the fourth goal, “WP and WIOA: Improve follow-along services” includes:
- CDRs, DVOPs and ESRs will ensure that follow-along services are offered timely to assist customers with employment needs when applicable.

\*Measurement Process: Quality Assurance Program Managers will develop a format to report a progress snapshot on a quarterly basis. The progress will be reviewed at the October, 2019; January 2020; April 2020 and July 2020 programs meetings. Report will be based on Wagner Peyser; WIOA; WTP and SNAP participations, enrollments, exits and other applicable data elements collected for PY 19/20.

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

Below are the current negotiated goals. The new negotiated local levels of performance will be negotiated before the July 2020 Program Year.

<b>Measures</b>	<b>LWDB 24 PY 2019-2020 Performance Goals</b>
<b>Adults:</b>	
Employed 2nd Qtr After Exit	<b>89.20</b>
Median Wage 2nd Quarter After Exit	<b>\$7,200</b>
Employed 4th Qtr After Exit	<b>85.50</b>
Credential Attainment Rate	<b>78.00</b>
<b>Dislocated Workers:</b>	
Employed 2nd Qtr After Exit	<b>83.20</b>
Median Wage 2nd Quarter After Exit	<b>\$6,850</b>
Employed 4th Qtr After Exit	<b>79.20</b>
Credential Attainment Rate	<b>68.20</b>
<b>Youth:</b>	
Employed 2nd Qtr After Exit	<b>75.50</b>
Employed 4th Qtr After Exit	<b>69.20</b>
Credential Attainment Rate	<b>80.30</b>
<b>Wagner Peyser:</b>	
Employed 2nd Qtr After Exit	<b>65.20</b>
Median Wage 2nd Quarter After Exit	<b>\$4,850</b>
Employed 4th Qtr After Exit	<b>66.20</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)).**

The Southwest Florida Workforce Development Board, Inc. dba CareerSource Southwest Florida is the fiscal agent and the direct provider of workforce services. Performance and effectiveness is assured by internal monitoring, contracting with independent firms for auditing and monitoring services and by state-level Department of Economic Opportunity (DEO) staff reviews.

An independent Certified Public Accounting firm provides audit services. The objective of the audit is to provide an opinion on the financial statements taken as a whole. Audit services will include examination of financial statements in accordance with accounting principles in the United States of America and preparation of audit reports in accordance with the Government Auditing Standards.

The LWDB contracts with a firm for independent fiscal and programmatic monitoring services. This includes:

**Administrative/Fiscal Monitoring:** The scope of administrative and fiscal monitoring includes tests, where appropriate, of whether our LWDB and sub-recipients receive, disburse, safeguard and account for funds in compliance with the terms and conditions of the sub award, applicable federal and state statutes and regulations, and local policies and procedures. Administrative monitoring also includes tests for compliance with administrative requirements governing activities such as procurement, property management and reporting. In addition to compliance testing in these areas, monitoring encompasses examination of SFWDB and sub-recipients procedures and practices to determine the extent to which, in the monitor's opinion, such practices are efficient and effective.

**Programmatic Monitoring:** The scope of programmatic monitoring includes tests to determine whether our LWDB and sub-recipients, including the One-Stop Operator, are providing services and achieving program outcomes in accordance with the terms and conditions of the sub-award, applicable federal and state statutes and regulations, and local policy and procedures. Programmatic monitoring also includes tests of compliance with program regulations governing participant eligibility determination and documentation, service delivery, recordkeeping, data entry and case management.

In addition to compliance testing in these areas, monitoring encompasses examinations of procedures and practices to determine the extent to which, in the monitor's opinion, such practices are efficient and effective.

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

CareerSource Southwest Florida follows Federal and State policy for several different programs as guides to determine who is eligible to receive program services and directs which program benefits and funding can issue for a participant who is enrolled in training or other allowable activities. LWDB 24's “self-sufficiency” guidelines are:

- A. Adult employed workers – use of the Poverty Guidelines as determined and adjusted annually by the United States Department of Labor. Those individuals determined to be eligible for program funded services may not earn income that exceeds 200% of the Federal Poverty Level which is calculated to reflect their family size. A provision for a waiver from the Executive Director may be granted for individuals with certain circumstances that warrant participation.
- B. Dislocated workers who are working in an “income maintenance job”, or “stop-gap employment”. Those individuals determined to be eligible for program funded services do not earn more than 80% of the wage that was earned from the employer from whom they were dislocated. A period of no more than five years is used when determining stop-gap employment.



## 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.

Programmatic cross-training among partners will be a continuous process in order to offer a more integrated plan of service and understanding of referral methods. Partner agency staff is knowledgeable about workforce service programs and other resources available within the one-stop system and refers individuals to partners as deemed appropriate and necessary. CareerSource Southwest Florida program staff has been cross trained to administer Workforce Investment and Opportunity Act (WIOA), Welfare Transition (WT), Supplemental Nutrition Assistance Program (SNAP) and other programs. This integration of the program staff reduces duplication of services and simplifies the process of delivering services provided with by workforce development programs.

CareerSource Southwest Florida coordinates activities with the Adult Education and Literacy programs offered through our five school districts. The Transitions Counselor with the Adult Learning Center at Charlotte County Public Schools schedules appointments with every new GED/ESOL student and begins writing a "Career Plan" with them. The Transitions Counselor meets with them frequently during enrollment and assists with career exploration and awareness; researching postsecondary education opportunities; jobs in local community; and financial aid opportunities. To avoid duplication, CareerSource Southwest Florida and adult education programs may share career planning information.

The Florida Department of Education's, Division of Vocational Rehabilitation (VR) and Division of Blind Services assist individuals with disabilities who are determined eligible for vocational rehabilitation services. Services include evaluation, counseling, guidance, developing job seeking skills, physical and psychological restoration, training, rehabilitation engineering, assistance in securing equipment and licenses, job placement and follow-up activities. Persons with disabilities are assisted by all staff in the CareerSource Southwest Florida centers. WIOA case management orchestrates service delivery and would therefore avoid duplication. Cross-referrals between Center staff and VR may occur in person, by telephone or by email.

These partners are included in the Memorandum of Understanding (MOU) which outlines responsibilities and helps to eliminate duplication. In some instances, no formal agreement or MOU exists, however, information sharing and cross-training of staff, potential clients and community members occurs at interagency/community meetings, agency staff meetings or one-on-one as requested.

Partner meetings are facilitated by each of our Center Supervisors. These meetings include representation from Vocational Rehabilitation, Blind Services, AARP's Senior Community Service Employment Program (SCSEP), Job Corps, school districts' adult education programs, and technical colleges.

Referrals between partners for services and programs may be made in-person, by telephone, through written communications (fax, e-mail and paper referrals), or

electronically through Internet systems or other connections. Certain programs use state or locally-created forms. Resource rooms provide information in hard copy and electronically. CareerSource Southwest Florida staff shares an automated online system with Department of Children and Families staff. Partners will continue to provide cross-referral to services and training as well as possible co-enrollment options whenever appropriate and practical. Agency referrals are based on self-disclosure, customer choice, personal interview and the significance of known impairment. The lack of shared information, in some cases, is a barrier we are working to overcome. We hope to expand our new electronic document management process in the future. Core program representatives will be discussing quicker solutions for sharing information to include providing hard copies to customers, who can then provide information to other agencies.

The local online Inquiry Form was developed, per request of committee members representing business. Through the Partner meetings, the Inquiry Form has gone through revisions to make it more user-friendly and to provide more specific information. The Inquiry Form allows customers to connect directly with Center staff via our website. Schools and businesses direct potential students or employees to the Inquiry Form for eligibility assessment. The completed form is directed to an email contact and distributed to the appropriate Center and then to a Career Development Representative so individualized contact is made.

**(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)).**

Economic development goals are aligned with our partner economic development councils/economic development offices (EDCs/EDOs). Board and Center staff works with local economic development organizations to assist new and growing businesses throughout the region. Representatives of our local economic development organizations participate in industry-specific focus groups and surveys conducted by the CareerSource Southwest Florida and are active members of our Board and Committees. We have partnered with the local economic development offices and our Alliance of Educational Leaders to participate in summits designed to align educational programs with the needs and emerging needs of business.

Florida Gulf Coast University's Small Business Development Center (SBDC) provides information on entrepreneurial workshops, training and counseling assistance to our One-Stop staff and customers. CareerSource Southwest Florida staff serves on their advisory board and SBDC staff is physically located in the Immokalee Center.

As noted in the Description of Program Services, Part (12), CareerSource Southwest Florida partnered with the Collier County economic development office to establish an economic incubator/accelerator in Naples. Collier County continues to operate this program today. The program has since been expanded by Collier County to include The Florida Culinary Accelerator @ Immokalee; an FDA-approved, membership-based commercial kitchen and processing facility. (<https://theculinaryaccelerator.com>).

The Business Services Division continues to work with key partners including economic development entities to meet the current and future workforce needs of local businesses.

Coordination with economic development includes meeting with prospects, assisting new and expanding businesses with recruiting and hiring events, as well as, providing information on current labor force availability, wages, training programs and training funds available locally and/or through CareerSource Florida's Florida Flex program.

**(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)).**

As noted in Part (4) of Analysis of Need and Resources, partnership with education partners is strong. The Alliance of Educational Leaders, Career and Professional Education (CAPE), and Career/Adult Education are key partners in the success of local systems.

The Alliance of Educational Leaders is a collaborative partnership with CareerSource Southwest Florida and the CEO's of regionally accredited (SACS) K-20 educational institutions in Southwest Florida. Utilizing this partnership, CareerSource Southwest Florida and the educational leaders of technical colleges associated with the local school districts as well as the Florida Gulf Coast University; Hodges University; Keiser University; and Nova Southeastern University continue to identify and meet future workforce needs.

CareerSource Southwest Florida works on an ongoing, as needed basis with the secondary educators. Our Executive Director has provided letters of endorsement for hundreds of CAPE certifications to assist in securing approval by the Florida Department of Education for these programs in the region's high schools of all five school districts. These programs offer industry-recognized certifications/credentials. Secondary students are able to attain a multitude of certifications as they navigate through their high school education. This allows students to graduate high school with a diploma and a portfolio of certifications as they enter the world of work and continue their post-secondary education.

The same five school districts partner with CareerSource Southwest Florida to offer high-demand occupational skills training programs through their technical colleges/centers and other post-secondary programs. The Regional Targeted Occupations List (RTOL) is used as a guide as we partner to meet local and regional business demands. The referral system to/from centers and post-secondary program providers allows for efficient services to our customers without duplication of efforts. Our Career Development Representatives (CDRs) provide orientation and eligibility determination onsite at our Eligible Training Provider campuses on an as needed basis. The latest meeting of the partnership is exploring ways to share customer assessments such as utilizing a) hard copy that customer delivers, b) electronic request system, and c) administrative rights to key workforce staff to the education system's FloridaShines.

In collaboration with the school districts our Destination Graduation program provides intensive drop-out prevention services to WIOA-eligible, in-school youth and is described in greater detail in Part (6) of the Analysis of Need and Available Resources.

**(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)).**

As Career Development Representatives (CDRs) assess the needs of participants, it is determined what supportive services are necessary to reduce the participants' barriers to successfully completing the workforce program in which they are enrolled. For Workforce Innovation and Opportunity Act (WIOA) Youth, bus passes may be issued to assist with transportation. For work activity required recipients of Temporary Assistance for Needy Families (TANF), services may include:

- Transportation expenses: gas cards, bus passes and contracted transport services by community partners,
- Support services; emergency car repairs necessary to make the vehicle safe to operate, auto liability insurance, vehicle registration, work clothing, tools, books, etc.
- Child Care Service: referral may be provided to the Early Learning Coalition (ELC) based upon the availability of resources. The providers of the Early Learning Coalition are responsible for determination of eligibility and authorizing actual child care service.

Total TANF services provided to a customer per program year, 07-01-XX – 6-30-XX, will not exceed \$2,000.00, excluding the cost of childcare. Referral of participants to programs and services within the Centers occur in person and by telephone. For programs and services outside the Centers referrals may be prearranged by telephone or through written communications e.g. fax, e-mail and paper referrals. Steps are taken to ensure the most economic path is taken to obtaining supportive services.

Our Equal Opportunity Officer is a member of the Lee County Local Coordinating Board which supports the Transportation Disadvantaged Program to enhance the mobility of individuals to achieve independence by providing medical, employment, education and other life sustaining trips. Center staff are represented at all five county Transportation Disadvantaged boards.

A Board member/Committee chairperson is an active members of the Lee County Community Action Agency/Neighborhood District Committee (CAA/NDC). The CAA/NDC is an advisory committee to the Lee County Board of County Commissioners, participating in planning, program performance evaluation and guidance on programs impacting the lives of low-income and at-risk residents of Lee County.

**(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)).**

Activities and services are coordinated and integrated into a seamless process for the benefit of the customers. Customer groups are identified through informal assessments used throughout the Centers to determine the most appropriate direction for customers. An

initial assessment by the Receptionist/Greeter may identify the reason for the visit and directs customers to appropriate areas. In the Customer Service area, staff details Center services and assistance to determine a customer's next steps. Orientations to Center services are provided.

For WIOA applicants, a self-assessment form is used to gather information regarding the applicant's career preferences and potential need for training. On-going assessments by a CDR or other Center staff will guide customers to a self-directed path, group sessions, or one-on-one assistance. Interest surveys may be used to determine interest and suitability for WIOA programs. The Welfare Transition Program (WTP) assessment form identifies needs, skills and abilities, which allows for quick referral to appropriate services. The Supplemental Nutrition Assistance Program (SNAP) program has specific programmatic tools which include a comprehensive assessment of knowledge, skills and abilities and interests.

Although these assessments will assist in determining which services may be needed on an individual basis, there may be certain needs common to targeted populations. Dislocated workers and older workers may benefit from the direct placement services provided by Wagner-Peyser staff with some assistance with résumés. Customers with an interest in training for non-traditional employment may need additional testing and interest inventories to assess current interests and skill levels and then determine appropriate training. Persons with disabilities may need assistance with certain accommodations to return to the workforce.

We assess walk-in customers for military service at point of entry to refer appropriately. Veterans are asked to complete the Department of Economic Opportunity (DEO) Veteran's Initial Intake form which enhances efforts to give priority to those with significant barriers to employment (SBEs). Veterans with SBEs and requiring more intensive case management may be referred to Disabled Veterans' Outreach Program (DVOP) staff. Resources most needed by Migrant and Seasonal Farm Workers (MSFWs) and public assistance recipients include job referrals and supportive services such as transportation. Displaced homemakers generally need employability workshops (job search, interviewing skills, etc.) and will need additional assessment to determine transferable skills. People with limited English-speaking proficiency may need referrals to English for Speakers of Other Languages (ESOL) classes.

Workforce services are provided to targeted populations in a variety of ways. Services are available at the Centers but outreach to targeted populations ensures a stronger connection. Staff visits homeless shelters, abuse shelters, and other community organizations to educate their staff and participants on services available through the CareerSource Southwest Florida centers. Attendance at ex-offender/re-entry meetings helps to keep information flowing in both directions, regarding the needs and assistance available for this population. MSFWs are contacted by the MSFW Outreach Workers to offer information and assistance. Veteran staff performs outreach and attend Stand Down activities annually. CareerSource Southwest Florida staff will continue outreach to community-based organizations, faith-based organizations and other local groups serving low-income individuals, older workers, homeless, ex-offenders and other hard-to-serve individuals such as those with limited English speaking abilities.

Wagner-Peyser staff is included in the one-stop cross-training from the standpoint of sharing information on these programs as well as learning the basics of the array of

programs offered through the Centers and outside the Centers. Programmatic cross-training is a continuous process in offering a more integrated plan of service. Training will include information on WIOA, WTP/TANF, SNAP, Job Corps, business services, resource rooms, workshops, MSFWs, TAA, Veterans, and Wagner-Peyser programs. For the purposes of referring participants to other support services, training will also include information on vocational rehabilitation, GED programs, ESOL, childcare and transportation. To avoid duplication, outreach is coordinated by the one-stop delivery system partners.

- (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).**

General Education Diploma (GED) preparation classes are provided by our school districts either through referral to the school campus or onsite at the CareerSource Southwest Florida centers. The Test for Adult Basic Education (TABE) are generally administered through the local school systems. Pen and paper TABE may be administered by our Destination Graduation (DG) mentors or other staff at the One-Stop centers as needed. Currently, Adult and Career Education provides an instructor to teach basic introduction to computer classes and Microsoft Office applications in the computer labs in one of our CareerSource Southwest Florida centers. Per WIOA requirements, a CareerSource Southwest Florida staff person reviews Adult Education and Family Literacy Act (AEFLA) grant applications for the five-county area. These reviews require a determination that the application is fully aligned, partially aligned or not aligned with the local area Plan. In some cases, local MOUs or agreements may be sought, when these classes are offered onsite at the CareerSource Southwest Florida centers. Wherever activities are provided, every effort is made to maintain a seamless process for individuals to access needed services.

Procedures for the provision of services to individuals with limited English proficiency include participant referrals to English for Speakers of Other Languages (ESOL) through our school districts' adult education programs, technical schools and Literacy of America.

- (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.**

The locally-developed iCareer (Individualized Career) service delivery model, identified in Part (3) of Description of Program Services, is utilized with Welfare Transition Program (WTP) and Supplemental Nutrition Assistance Program (SNAP) participants. This model assists participants with designing career pathways and acquiring in-demand skills. This may include strengthening foundational skills, work-based training, acquiring a short-term certificate/credential, occupational/vocational certificate or college degree. Our well-integrated staff will plug these customers into WIOA activities as needed.

A program activity guide has recently been developed locally for Metrix Learning Soft Skill Cluster Courses to include a common curriculum of soft skill training, as well as, soft skill industry path courses specific to an industry. The guide was designed for Welfare

Transition (WT), Supplemental Nutrition Assistance Program (SNAP) and Workforce Innovation and Opportunity Act (WIOA) In-School Youth (OSY) who are Temporary Assistance for Needy Families (TANF) eligible. The Metrix Learning Soft Skills Training is combined with locally provided employability skills activities and workshops. The Metrix Learning My Plan Pathway work skill courses provide the opportunity to 1) select an industry path and occupation linked to a career goal; 2) complete a simple skill gap assessment; and 3) review and assign work skill courses recommended to assist with overcoming skill gaps.

- (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.

Collier Farmworker Career Development Program (FCDP) MOU – Promotes greater collaboration and a cross-referral process to ensure farmworkers receive all services under the WIOA from both the CareerSource Southwest Florida and the FCDP program serving Hendry, Glades, Lee and Collier counties. The FCDP program provides career and training services, TABE testing, KUDOR testing, English language and basic education classes, and coordination with community agencies for supportive services. CareerSource Southwest Florida provides job application, résumé and interviewing skills workshops, career assistance for non-English speaking customers, assistance with enrollment into approved training linked to the Regional Targeted Occupations List (RTOL), job referral and placement assistance.

Immokalee Multicultural Multipurpose Community Action Agency, Inc. (IMMCAA) MOU – To seek to collaborate on efforts to assist low-income residents of Collier County in becoming self-sufficient through education and job training that leads to living wage employment. The IMMCAA serves as a catalyst in providing necessary services to these residents.

ESOL while in occupational training – CareerSource Southwest Florida has Training Provider Agreements with many schools to fund occupational training but for limited English speaking students, these programs can be more difficult. Whenever possible, agencies partner to help to alleviate the problem.

## 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)).**

The One-Stop system is designed to enhance access to services and improve long-term employment outcomes for individuals seeking assistance. Workforce services and resources offered through the one-stop delivery system are available to all individuals who meet eligibility requirements for those services. Services may be offered onsite at the One-Stop centers, by telephone and/or electronically. Career services, including staff-assisted services, will be provided. Many services are universally provided to users of the One-Stops. The combination of Wagner-Peyser, TANF, Workforce Innovation and Opportunity Act (WIOA) and funds from other One-Stop partners will result in an expanded level of available services.

Each respective partner provides vital services to one-stop customers. Resources provided by one-stop partners include knowledgeable staff, equipment (computers) and access to services. Many are shared resources, such as computers and Internet access in resource rooms.

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

The following required WIOA partners are included in the one-stop delivery system:

- Job Corps (through Adams & Associates)
- Migrant and seasonal farmworker (MSFW) programs
- Florida Department of Education/Division of Vocational Rehabilitation
- Florida Department of Education/Division of Blind Services
- Adult Education and Family Literacy Act (AEFLA) activities
- Career and Technical Education programs at the post-secondary level
- Senior Community Service Employment Program (SCSEP)
- Employment and training activities under Community Service Block Grant (CSBG) carried out by the Department of Housing and Urban Development
- Department of Children and Families

And those administered at the local level CareerSource Southwest Florida:

- WIOA Adult, Dislocated Worker, and Youth Programs
- Employment services authorized under the Wagner-Peyser Act
- Trade Adjustment Assistance (TAA) activities authorized under chapter 2 of title II of the Trade Act of 1974
- Jobs for Veterans State Grants programs authorized under chapter 41 of title 38, U.S.C. (LVER and DVOP programs administered by DEO)
- Reemployment Programs authorized under state unemployment compensation laws (Florida's Reemployment Assistance Program operated by DEO)
- Temporary Assistance for Needy Families (TANF) authorized under part A of title IV of the Social Security Act (unless exempted by the Governor under §678.405(b) of the draft WIOA rule)
- Supplemental Nutrition Assistance Program (SNAP)



There are currently no partners in our local workforce development area for:

- YouthBuild
- Native American Programs
- Programs authorized under sec. 212 of the Second Chance Act of 2007

The draft of this Four-Year Local Workforce Plan was forwarded to the core partners for input. The draft was also forwarded to the required partners, non-required partners, economic development partners, Board members, the Board's Committee members and other interested parties and was posted for public comment. The partners will continue to craft the Plan and work toward implementation.

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

- 21st Century Community Learning Center Grant (Miracle Plus Grants); Provides after-school academic and enrichment activities for over 850 students in Immokalee schools in grades K-8.
- Empowerment Alliance, Immokalee: Referral source for low cost housing and home ownership to include workforce housing initiatives.
- Avow Hospice: Located in the Immokalee center and available by referral, throughout the Region.
- Department of Business and Professional Regulations (farm labor)
- Florida Gulf Coast University (FGCU), Small Business Development Center

**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.**

The current Memoranda of Understanding (MOUs) with One-Stop partners is attached. The MOU for the coming years is currently being circulated for review and signatures and will be forwarded upon completion.

**(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)).**

The designated Equal Opportunity Officer guides the Region to ensure implementation of and compliance with equal opportunity and nondiscrimination regulations. Outreach and other printed materials include the following taglines: "Equal opportunity employer/program," "Auxiliary aides and services are available upon request to individuals with disabilities," and "All voice telephone numbers in this document may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711."

Flyers announcing an event held at a Center include a CareerSource Southwest Florida logo and EEO tagline. Staff training will be provided on a continuing basis.

Notices outlining reasonable accommodation request procedures are posted in each one-stop career center near the accessible work stations and at entrances. All one-stop career center locations have accessible entrances. Signs posted at accessible entrances indicate that the entrances are accessible. These signs also include telephone contact information to request reasonable accommodations.

All Centers offer accessibility to individuals with disabilities in accordance with the Americans with Disabilities Act and Equal Opportunity guidelines. Due to the efforts of our Disability Program Navigator (DPN), the Centers are better prepared to assist individuals with disabilities in accessing the services they need. Assistive technology devices have been made available to include additional licenses and upgrades for Zoom text/JAWS and UbiDuo, a dual keyboard with LCD monitor. The Center for Independent Living of Gulf Coast is specialized in assisting individuals with more significant barriers and advises CareerSource Southwest Florida staff on providing the most appropriate services, technology and materials, based on an individual's needs. Their equipment loan program allows for assistive technology devices to be borrowed for a short period of time.

The DPN developed strong relationships with partner agencies that serve persons with disabilities. These collaborations improve the employability, employment and career advancement of adults and youth with disabilities through leveraging resources and integrating service delivery. This building process has produced information sharing and cross-referrals for services to help each individual customer overcome barriers to employment. The DPN coordinated training sessions to educate One-Stop staff and partners on the numerous resources available to assist persons with disabilities. Ticket to Work addresses the re-introduction of those with disabilities to sustainable employment. A designated Board staff along with designated Center staff provides employment services with the reliance of partners. Those partners include, but are not limited to:

- Division of Vocational Rehabilitation
- Division of Blind Services
- Adult Education
- Florida Relay Services
- Center for Independent Living of Gulf Coast
- Agency for Persons with Disabilities
- Goodwill Industries of Southwest Florida
- Senior Friendship Centers
- Lee Tran
- Partners in Transition Council
- United Cerebral Palsy of Southwest Florida
- Visually Impaired Persons of Southwest Florida
- Good Wheels
- Blind Association of Southwest Florida
- Deaf Services of Southwest Florida
- Epilepsy Services of Southwest Florida
- Interpretive services for languages other than English

As noted previously, a Board member/Committee Chairperson is an active members of the Community Action Agency/Neighborhood District Committee (CAA/NDC). The CAA/NDC is an advisory committee to the Lee County Board of County Commissioners, participating in planning, program performance evaluation and guidance on programs impacting the lives of low-income and at-risk residents of Lee County.

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

Center facilities and services are designed to be used by all customers. Facility Accessibility Surveys have been completed for each Center to ensure structural barriers are removed. The Interpretive Services flyer (for speakers of other languages) is posted in all centers. Assistive technology devices are available and help to ensure that persons with disabilities will have the same access to materials and digital resources as persons without disabilities. Staff offers options to customers to listen to or read materials and may present information in multiple formats. Monitoring found that employees “are sensitive to the needs of customers with disabilities.”

**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)).**

The local workforce system is comprised of five comprehensive, physical One-Stop centers in local areas that provide a full range of services with two supporting satellite offices to meet specific needs of the communities in which they are located. One of the satellite offices and two of the full-service centers are located in remote rural areas. Full-service centers are frequently open evenings and weekends to accommodate businesses and job-seekers.

Employers are assisted with the use of Employ Florida (EF) for listing job openings. Job seekers are encouraged to visit our website for information on hiring events, training and upcoming employability workshops and to self-register in EF to more readily access job vacancies and labor market information.

Integrated program staff has been cross trained to administer Workforce Investment and Opportunity Act (WIOA), Welfare Transition (WT), Supplemental Nutrition Assistance Program (SNAP) and other programs. This integration of the program staff reduces duplication of services and simplifies the process of delivering services provided with by workforce development programs.

**(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)).**

Services at the CareerSource Southwest Florida centers are well integrated. Staff is either prepared to directly assist customers or will rapidly refer them to other staff specialized in these service areas. Integrated program staff has been cross trained to administer Workforce Investment and Opportunity Act (WIOA), Welfare Transition (WT), Supplemental Nutrition Assistance Program (SNAP) and other programs. This integration of the program

staff reduces duplication of services and simplifies the process of delivering services provided with by workforce development programs. Programmatic cross-training among partners will be a continuous process in order to offer a more integrated plan of service and understanding of referral methods. Partner agency staff is knowledgeable about workforce service programs and other resources available within the one-stop system and refers individuals to partners as deemed appropriate and necessary.

Centers have progressed with electronic document management processes. With document scanners and e-signature capability, intake and case management generates less paper and more accessible information. Scanned documents are uploaded to the Department of Economic Opportunity (DEO) information management system, Employ Florida (EF). The local electronic document management process has been implemented with the Workforce Innovation and Opportunity Act (WIOA) programs, Welfare Transition Program (WTP) and Supplemental Nutrition Assistance Program (SNAP) and has greatly assisted with case coordination. Farmworker Career Development Program (FCDP) staff with Immokalee Technical College (iTECH) and CareerSource Southwest Florida center staff in Immokalee and Clewiston are now better equipped to assist participants through the use of the a shared database system (Employ Florida).

The Disability Program Navigator (DPN) developed strong relationships with partner agencies that serve persons with disabilities. These collaborations improved the employability, employment and career advancement of adults and youth with disabilities through leveraging resources and integrating service delivery. This building process has produced information sharing and cross-referrals for services to help each individual customer overcome barriers to employment. As noted in Part (4) of Workforce Development Area Vision and Strategic goals, our Disability Program Navigator (DPN) recently retired and we have begun provision of training for another staff person.

**(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)).**

In early 2017 the Board of Directors accepted a recommendation from the Executive Committee to contract with an outside third-party to be the One-Stop Operator for all of the Centers within our Local Workforce Development Area (LWDA) for the July 2017 – June 2018 program year. Board staff prepared a DRAFT Request for Proposals (RFP) which was forwarded to the Executive Committee. Comments were incorporated into the RFP.

To ensure a competitive process, the final RFP was then posted to [www.careersourcesouthwestflorida.com](http://www.careersourcesouthwestflorida.com) for thirty days, emailed to the five counties for posting, and emailed to Board members, Committee members, Board staff, interested parties and the RFP vendors' mailing list. After reviewing proposals independently, the Proposal Review Panel met and discussed proposals and made its recommendation at the next Board meeting. The RFP and the contract allow the Board of Directors to renew on an annual basis for up to two additional years, based on performance, organizational strategies, and/or funding availability. An RFP for July 2018 – June 2019 was prepared in the same manner. In March 2019, the Executive Committee recommended Board approval of the One-Stop Operator for one additional year, July 2019 – June 2020. This was approved and contract extended. In February 2020, the Executive Committee met and developed a recommendation to retain the One-Stop Operator for the July 2020 – June 2021 program year. In March the Board of Directors approved the extension of the contract.

**(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)).**

Business Services has established a Professional Career Network (PCN) in response to the needs of job seekers seeking professional positions. These professionals in transition are provided a 12-hour workshop over three days and then receive one-on-one staff assistance in their job search. Employers have provided guest presentations within these workshops including information on applicant tracking systems. Businesses have been very receptive to the CareerSource Southwest Florida staff referrals of these professionals.

Through many meetings and focus groups, businesses discussed the need for soft skills training. Our Executive Director, along with other local business leaders, served on a committee for Hodges University, giving input for the development of a Professional Effectiveness Certificate. The steps within this effort are competency based. The program was piloted and now provides the following courses:

- Essentials of Business Communication
- Improving your Personal Productivity
- Developing a Successful Mindset: Customer and Team-Centric
- Introduction to Computers
- Fundamentals of our Business

Learners completing this certificate master the following competencies: Adaptability, Business Understanding, Communication Skills, Computer/Technical Skills, Customer Service, Judgment, Organization, Proactive and Team Player.

Sector Strategies Initiative funding is addressing the critical needs of the Information Technology (IT) industry, IT professionals and the businesses in Southwest Florida who employ IT professionals. With this funding we are providing short-term training to eligible participants. Activities specifically identified in this project may include classroom training, testing, re-testing, internships, Incumbent Worker Training and On-The-Job (OJT) training, as well as, provision of support services (tools, text books exams, etc.), as needed.

Adult and Career Education provides an instructor to teach basic Introduction to Computers, Microsoft Word, Microsoft Excel and QuickBooks applications in the computer lab in one of our CareerSource Southwest Florida centers.

## 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 Southwest Florida Workforce Development Board, Inc. dba CareerSource Southwest Florida is the administrative entity and fiscal agent for LWDB 24, comprised of Charlotte, Collier, Glades, Hendry, and Lee Counties. Services provided by the contracted One-Stop Operator are described in Part (4) E. of Organizational Structure. Through the One-Stop Leadership Team (OSLT), Board staff provides oversight for our workforce delivery system while Center Supervisors provide the direct supervision and are responsible for the day-to-day operations and performance outcomes of the One-Stop Centers. Programs in the local workforce system include:

- WIOA Adult, Dislocated Worker, and Youth
- Temporary Assistance for Needy Families (TANF)
- Supplemental Nutrition Assistance Program (SNAP)
- Department of Economic Opportunity (DEO) - Employment services authorized under the Wagner-Peyser Act
- Adult education and literacy
- Vocational Rehabilitation
- Blind Services
- Job Corps (through Adams & Associates)
- Migrant and seasonal farmworker (MSFW)
- Senior Community Service Employment Program (SCSEP) through AARP
- Farmworker Career Development Program (FCDP) - Collier County School District
- Department of Children and Families
- Career and technical education programs at the post-secondary level
- Department of Housing and Urban Development employment and training activities
- Trade Adjustment Assistance (TAA) activities
- Ticket to Work
- Disabled Veterans' Outreach Program (DVOP)
- Access to Reemployment Programs

Employers frequently use conference rooms or other office space at the CareerSource Southwest Florida centers for conducting job interviews. Center staff provides assistance with scheduling, screening and testing. Center staff may provide recruitment assistance at the employer's place of business, if deemed appropriate. Details on our Business Services Division are noted in Part (7) of this Section.

As noted in Part (2) of Local Workforce Development Area Vision and Strategic Goals, representatives of the core programs share information to develop a better understanding of each other's programs and services. This provides a seamless continuum of services for customers and will serve to reduce duplication. Ultimately the goal of the core partners is to

assist customers in becoming self-sufficient and productive. Each Center Supervisor schedules partner meetings and staffing meetings, as necessary. Partner meetings generally include decision makers with discussions of policies and procedures while staffing meetings are held with front-line staff to discuss common customers. We will continue to align our programs and ensure business and individual customers are aware of the full array of available services.

The 247 programs of study with 30 educational institutions on the Eligible Training Providers List (ETPL) are designed to meet the skilled workforce needs of employers in our local area. These programs link to demand occupations on the Regional Targeted Occupations List (RTOL).

As discussed in Part (4) of Analysis of Need and Available Resources, CareerSource Southwest Florida staff assisted the five school districts and Florida SouthWestern (FSW) with data and other information for their Comprehensive Local Needs Assessment (CLNA) requirements for the Perkins V Transition Plan. Additional meetings are planned.

**(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)).**

Procurement of services by a competitive solicitation of \$250,000 and above shall be publicly advertised and a formal request for bids, proposals, or quotations shall be issued. The Board will ensure all prequalified lists of persons, firms, or products which are used are current and potential bidders will not be precluded during the solicitation process. Previous proposers, as well as entities which have asked to be included on the proposer/bid list for various types of goods and services, shall be notified that the Board is seeking service providers. Legal notices will be posted on the Board's website and shall be advertised throughout the five-county area.

Upon receipt of proposals by the published deadline, the Board's Planning and Grants Division staff provides the proposals to a Review Panel. Cost analysis information is provided by the Fiscal Division during the review process. If determined necessary, the Planning and Grants Division will provide a training session for the Reviewers. A Bidders' Conference may be provided to ensure potential proposers have the information necessary to write a competitive proposal. Otherwise, additional information, updates and Questions & Answers will be provided through email and/or on our website.

A Review Panel meeting will be held to discuss proposals and develop recommendations. At this meeting, the Review Panel may invite prospective providers to explain their proposals as needed. The Review Panel completes the review sheets and determines final recommendations for providers(s). Review sheet totals do not necessarily determine the outcome but serve as a tool for reviewers to formulate ideas for discussion. The Review Panel may forward its recommendations directly to the full Board or to the Program and Planning Committee, who in turn, forwards its recommendations to the Board for final award and funding level approval. In some instances, the Program and Planning Committee may serve as the Review Panel and bring its recommendation directly to the Board. Due to the bi-monthly Board meeting schedule, the Program and Planning Committee may receive authority by the Board to approve providers in order for contract negotiations to commence, contingent upon final Board approval required at the next scheduled meeting.

- (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)).

iCareer (Individualized Career) is a locally-developed service delivery model to assist customers in acquiring in-demand skill sets in an occupation of interest. This model is employed across program areas, particularly for Workforce Innovation and Opportunity Act (WIOA) Youth, Welfare Transition Program (WTP) and Supplemental Nutrition Assistance Program (SNAP) participants. Incentives are available for WTP and SNAP participants. iCareer is also used to assist customers in designing a career pathway, reinforcing foundational skills, acquiring in-demand job skills, securing High Skill/High Wage employment and identifying career ladder opportunities.

As detailed in Part (7) of Coordination of Services, staff is also using a locally-developed program activity guide for Metrix Learning which includes soft skills training for WT, SNAP, and WIOA TANF-Eligible ISY.

A list of short-term (less than one year) non-ITA training programs has been developed for use by WTP, SNAP and Out-of-School Youth. These are courses with approved training providers and vendors which offer an industry-recognized credential in areas such as information technology, water management, education, specialty trades, healthcare and manufacturing.

- (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)).

Per the Board's Guidelines for Approval of Training Providers for the Eligible Training Providers List (ETPL), eligible programs must link directly to occupations on the Regional Targeted Occupations List (TOL). To ensure participants receive industry-recognized credentials, programs must lead to: (a) a certificate, an associate degree, baccalaureate degree, or (b) the skills or competencies needed for a specific job or jobs, an occupation, occupational group, or generally for many types of jobs or occupations as recognized by employers and determined prior to training. To keep up with the changing needs of industry, program additions may be requested throughout the year. Out-of-Region Training Providers may be approved to accommodate to needs of local business and job seeking customers.

Per the Board's Guidelines for Developing a Regional Targeted Occupations List (RTOL), the RTOL will be used to identify needs of local businesses and target specific occupations for training services to adults and dislocated workers. This also acts as a guideline for On-the-Job Training (OJT), Customized Training and entrepreneurship training. The guideline was developed with input from businesses and industry representatives during a planning meeting. The statewide and regional demand occupations lists released annually by the Department of Economic Opportunity (DEO) are used as a starting point in developing the RTOL. Additional resources used include Employment Projections Data, the Occupational



Employment and Wages website and the Florida Occupational Supply/Demand System from DEO/Bureau of Labor Market Statistics (LMS). Throughout the year, staff solicits feedback regarding changes to the RTOL. Public Notices are posted to our website and with each of the five county buildings. The current RTOL is forwarded to interested parties three times per year, along with criteria and instructions for requesting the addition of an occupation. These notices include a total of at least four submission dates, which fall just prior to local Program & Planning Committee and Board of Director meetings.

Economic development representatives throughout the five-county area were asked to provide their local economic development priorities. These included:

- Manufacturing
- Logistics, Transportation and Warehousing
- Professional Scientific and Technical Services
- Aviation, Aerospace, and Airport Services
- Clean Energy and Sustainable Solutions
- Construction
- Corporate Headquarters
- Destination and Entertainment
- Headquarters and Back Office Support
- Information Technology and Financial Technology
- Life Sciences and Healthcare
- Maritime
- Agriculture and Agribusiness
- Accommodation/Resort Tourism
- Wholesale Trade
- Healthcare/Hospitals and Senior Living
- Financial Services

Staff will target training for occupations that link to these local priorities as well as to Florida’s targeted and infrastructure industries, designated by Enterprise Florida as:

- Aviation & Aerospace
- Manufacturing
- Information Technology
- Logistics & Distribution
- Headquarters
- Life Sciences
- Defense & Homeland Security
- Financial & Professional Services
- CleanTech

Our five industry sectors chosen for the Continuous Performance Initiative are listed below. These sectors were chosen after analyzing labor market data and projections, receiving input from economic development and industry organizations, and existing knowledge of expanding businesses.

23	Construction
31, 32, 33	Manufacturing
48, 49	Transportation and Warehousing
54	Professional, Scientific, and Technical Services
62	Healthcare and Social Assistance

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

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

CareerSource Southwest Florida, under the guidance of its Board and Committee members, utilizes labor market data from the Florida Department of Economic Opportunity (DEO) and the U.S. Department of Labor (U.S. DOL) in the projection of workforce and industry demands of the Local Workforce Development Area (LWDA). This data is organized in a manner similar to Table A in B. (3) of the Analysis of Need and Available Resources, so the Board and Committee members may discern which industries employ Southwest Floridians. Annual projections of industry and occupation growth (DEO, U.S. DOL) are reviewed along with reports from partners such as the local and regional chambers of commerce and Florida Gulf Coast University's Regional Economic Research Institute. Articles from publications are shared, such as Florida Trend's Business Florida and Gulfshore Business.

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

The Executive Director, Business Services Director, and Communications Director are key liaisons between regional industry, education and community leaders. CareerSource Southwest Florida utilizes the vast backgrounds of the Board of Directors and its committee members to guide the One-Stop Centers and partners through the regional sector strategies. Services delivered to business leaders and jobseekers are strategically provided to meet future demands. Strong relationships with economic development professionals throughout the region are reinforced with a shared focus on targeted industries. Additionally, information is regularly shared with post-secondary education providers.

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

The Regional Targeted Occupations List (RTOL) is forwarded to Board members, committee members, economic development offices, chambers of commerce, educators and other interested parties several times a year. This offers an opportunity to request the addition of an occupation to the RTOL. Businesses submit letters documenting the demand for specific emerging occupations to meet the demands of industry sectors.

STEM (Science, Technology, Engineering and Mathematics) are vital components in a dynamic economy. Each of these disciplines is foundational to the on-going growth of high-skill, high wage industries of Southwest Florida. Individuals who master skills in these fields of study have many opportunities available to them in the regional workforce. Southwest Florida has adopted a "home-grown" workforce initiative that reaches into the K – 20 educational systems to cultivate interest in STEM related occupations to address the future workforce for our regional industry leaders.

Local business leaders, workforce and school district staff began an initiative in 2012 to discuss and assess local talent with STEM related skills. The local businesses leaders initially included architectural, biotechnology, and computer systems representation. Efforts were shared via the business partners with the Southwest Florida Chamber of Commerce's Leadership Team and interest grew with other business leaders. Education partner participation grew to include the local public post-secondary institutions which provided a broader assessment of the local talent pool. Regional events such as Workforce NOW reinforced the impact.

STEM @ WORK, organized field trips for high school students to local leading companies, to include Algenol (Biotech), Miller Associates (Architectural), CRA (Industrial Construction), Arthrex (Medical Device Manufacturing), Chico's FAS (International Fashion Producer), LeeSar (Medical Supply Distributor), Lee County Electric Cooperative, the County/Federal Courthouses and the Port Authority that included the Southwest Florida International Airport and Harbor systems. Students' feedback noted their enjoyment in observing skills required in robotics, algae regeneration, mass movement of all things necessary within the airport's purview and computer-aided systems that secured production lines to square miles of areas.

The group also invited science educators associated with local public institutions such as the Imaginarium, Edison-Ford Estates, PURE Fort Myers/Naples, Edison Inventors and middle school science curriculum coordinators. These partners focused the group's efforts to middle school students. Support for events such as robotic competitions and science fairs allowed partners to participate within the middle school system since field trips were discouraged by educators. Business leaders were approached by the educators to speak, in class or via video-conferencing, to students to reinforce learning labs.

Efforts to provide STEM @ WORK opportunities to students grow with each year. One best practice includes "math-lete" camps at our local university. Accounting firms were encouraged to sponsor activities so that the field of forensic accounting could be engaged in by twelve to sixteen year old students. This added a new layer to the traditional "math" summer camps the Florida Gulf Coast University (FGCU). A brand new program, this year, is the GEMS (Girls in Engineering, Mathematics and Science). The new program focuses on encouraging the love of science and math to continue from middle school through high school to post-secondary studies in young women.

A youth initiative originating from the Youth Council encourages career exploration for elementary school students. The project urges students to imagine their future career pathways and produce an individualized plan that is age appropriate. The "Picture This As A Career" initiative invites all fifth graders throughout the five school districts of Southwest Florida to complete an interest survey and compose a "power-graph" about their career interest with the goal of introducing the child to their future possibilities. The activities meet the education directives of the Florida Core Curriculum (and previously FCAT). The student utilizes the interest survey and "power-graph" to create a poster depicting their interest which is displayed at the closest CareerSource Southwest Florida Center (Clewiston, Fort Myers, Immokalee, Naples, or Port Charlotte). The public votes and the winners are used in the creation of a calendar distributed to the winners and workforce partners. The first calendars were produced in 2004 for a distribution of 2005 calendars and are very much anticipated by our partners annually.

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

The Program and Planning Committee of the Board reviews annual industry and workforce projections, demand occupations lists, and regional workforce occupational training offerings to strategize industry driven changes to services. This committee also reviews occupations eligible for workforce trainings and approves eligible training providers of the region. This assures that one committee aligns sector strategies, regional targeted occupations and available workforce training programs. This committee's actions require quorum and majority votes before taken to Board for discussion and majority votes.

Both the Committee and the Board of Directors have business representation. Those industries and/or industry sub-sectors that are projected to have the greatest growth in Southwest Florida are reviewed and representatives invited to join committees (Program and Planning Committee; Service Delivery Committee; or Youth Council) to ensure adequate representation in these industries.

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

Business Services staff are board members of the Southwest Florida Regional Manufacturer's Association (SRMA) and the Southwest Florida Regional Technology Partnership (SWFRTP). Manufacturing as well as Professional, Scientific and Technical Services are two of our targeted industry sectors. Business Services staff coordinate SWFRTP's annual TECHmatch event held at Florida Gulf Coast University. This event brings together businesses who employ technology professionals, educators, job seekers and students for an evening of recruiting and networking.

Business Services staff coordinate annual manufacturing hiring events within our One - Stop Centers in partnership with the SRMA. In addition, the SRMA hosts their monthly roundtable within our One-Stop Centers bringing together manufacturers and educators.

In regards to healthcare, several times a year staff from healthcare providers such as Lee Heath Hope Healthcare and Cypress Cove, the technical colleges, and CareerSource Southwest Florida hold information events about entry level healthcare careers, training opportunities and conduct an initial eligibility for WIOA services at various locations within Lee County.

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

As noted in (5) C. of this Section, STEM related skills and industries are vital components in a dynamic economy and critical to the high-skill, high wage industries of Southwest Florida. CareerSource Southwest Florida center staff continues to provide Labor Market Information, Industry Projections, STEM Occupations List and other Labor Market Statistics Center (LMS) products to the industry partners. Reports from Florida's Department of Economic Opportunity (DEO) are shared as information becomes available. During these industry meetings the partners provide valuable feedback to staff concerning their company's (and respective industry) future growth and/or demands. The Business Services Division works directly with these business leaders concerning their business' labor force demands.

CareerSource Southwest Florida submitted a proposal and received funding for “Emerging Initiatives – IT Industry”, one of the state’s Sector Strategies Initiatives. Through this grant, CareerSource Southwest Florida contracted with the Southwest Florida Regional Technology Partnership to survey businesses to identify the critical needs of the Information Technology (IT) industry, IT professionals and businesses in Southwest Florida who employ IT professionals. These are noted in Part (2) of Analysis of Need and Available Resources. Short-term training and testing geared toward attainment of these certifications has been provided to adults, dislocated workers, youth and incumbent workers. CareerSource Southwest Florida partnered with the local state university and college to provide on-line opportunities so that IT workers could ascertain in-demand certification as indicated by their employer. The opportunities were extended to other employees who required IT certifications required by their employers to continue employment. This extended to occupations in management, business, finance and other technologies. CareerSource Southwest Florida’s Business Development Division conducted extensive outreach so that this opportunity was available to many regional businesses. Those job seekers who participated in this initiative secured employment with the help of the additional training. This included individuals with Associate and Baccalaureate degrees that needed one or two more targeted certifications to meet the local employer needs.

Efforts of CareerSource Southwest Florida and its local and regional partners strive to meet the future workforce needs of each of the Region’s industry sectors by providing a highly skilled workforce that fulfills businesses demands.

**(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)).**

The in-demand occupations of the current workforce and those related to the emerging industries in the area are a priority for CareerSource Southwest Florida and its business and education partners. We strive to make available training programs that meet the needs of employers per occupation and the skill level as measured by the industry-recognized certification attained via the training program.

As described in more detail in Part (4) of this Section, Board staff ensures programs link directly to occupations on the Regional Targeted Occupations List (RTOL). The opportunity to add occupations to the RTOL is presented throughout the year with at least four possible submission dates. Program additions may be requested throughout the year. Out-of-Region Training Providers, generally in contiguous counties, are approved to accommodate the needs of local business and job seeking customers.

Information regarding occupational skills training programs and local and regional demands for those linking occupations is available on our CareerSource Southwest Florida website. The Eligible Training Providers and Programs webpage provides important data: 1) the RTOL and 2) the Eligible Training Provider List (ETPL). This same webpage has an easy-read data table with alphabetically listed occupations with the occupation’s projected annual growth, annual opening, average wage and entry wage per each listed occupation. Each occupation has a drop-down box for the user to view all the training providers in the five county area for that specific occupation. This drop-down box also outlines industry-recognized certification attainable per program.

The ETPL available via this webpage indicates important details such as: Certification, Program Length, Total Student Costs, PELL Eligibility and Minimum Reading and Math Skills Required of the potential student. The ETPL also specifies program performance: Program Completers, Found Employment Rate and the Average Wage at Placement into Employment for those who have participated in the past. All of this data educates the individual so that an informed decision can be made concerning provider/program choice.

Occupations in the industry priority areas provided by our economic development partners in Part (4) of this Section are given priority when discussing current and future training programs. Information is readily provided to our educational partners for their own institutions' future considerations. As CareerSource Southwest Florida discusses emerging industries and in-demand occupations with business and educational partners, all considerations for "timing" is given priority. Our educational partners require time to create curriculum that meets the industry requirements.

Career and Professional Education (CAPE) programs within the secondary education system of the five school districts connect to in-demand occupations and require industry-recognized certifications to meet the needs of the employer. As the local school districts submit applications for CAPE industry certifications, CareerSource Southwest Florida provides Letters of Endorsement, indicating the specific business demand.

The CareerSource Southwest Florida staff guides customers to use the available labor market resources available through Employ Florida and through Florida Research and Economic Information Database Application (FREIDA). Participants willing to relocate or those living in outlying areas of the region may use providers on the State's Eligible Training Provider list in other areas of the state. Having knowledgeable staff to guide customers via workshops and center resource rooms allows for employed citizens.

**(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;**

CareerSource Southwest Florida and its Business Services Division engage businesses in a team approach. Staff shift geographic areas as the businesses' labor needs require. As an example, staff members knowledgeable in Logistics Industry skill sets may meet with the employer in Naples, Port Charlotte or Clewiston to ensure an accurate assessment of business needs. Meetings in-person, via video-conferencing and/or telephone are scheduled to best suit the employers' needs. The Division Director, under the guidance of the Executive Director and the Leadership Team, sets immediate and short-term priorities based on industry/occupation needs that best stabilize and grow the regional economies. Businesses in industry sectors with high skilled/high wage jobs and a high growth rate are a priority. The size of the employer may be secondary since the growth of the industry allows for a number of opportunities throughout Southwest Florida and qualified job seekers are scattered throughout the region.

One initiative in Southwest Florida concerning the mentoring of qualified high skilled job seekers falls under the Professional Career Network (PCN). This initiative provides those job seekers additional services and support from our Business Services staff. The

feedback from these job seeking customers about the group coaching activities and workshops has been excellent. Employers have been very receptive to the CareerSource Southwest Florida staff referrals and pleased with CareerSource staff referrals and services.

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

A single, region-wide approach to business, media and community outreach has created greater coordination of services to employers and the business community by reducing duplication of services i.e. reducing the instances of multiple contacting of business and business organizations with same or similar objectives. The local online Inquiry Form was developed, per request of committee members representing business. This allows employers to direct potential employees to eligibility assessment. The completed form is directed to an email contact and distributed to the appropriate Center and then to a Career Development Representative so individualized contact is made.

The Disability Program Navigator (DPN) will serve as a member on the Business Advisory Council (BAC) which is a function of Goodwill Industries of Southwest Florida's Community Services Division. The BAC includes key stakeholders such as Vocational Rehabilitation's Business Services Division, and the Center for Independent Living Gulf Coast. The BAC brings together local business members and hiring representatives on a quarterly basis interested in diversifying their workforce and increasing their capacity to employ individuals with disabilities. Learning topics feature disability etiquette, workplace accommodations, training program opportunities such as On-the-Job Training, the Americans with Disabilities Act Amendments Act of 2008 (ADAAA), the Federal Contractor hiring initiative, interviewing do's and don'ts, tax benefits and other business related topics at no cost to business members. This group is working towards developing a local chapter of the national Business Leadership Network model and to expand its business membership.

As noted earlier under Coordination of Services, (2), the Business Services Division continues to work with key partners to meet the current needs of local businesses. Coordination includes assisting new businesses by providing information on current labor force availability, meeting with the employers, working with educators to better prepare the workforce, and working with schools and businesses to develop specific programs to meet employer recruiting needs

CareerSource Southwest Florida also has representation on the following boards and committees:

- Coalition of Florida Farmworkers Organization (COFFO)
- Emergency Assistance Clearing House (EACH)
- Farmworker Career Development
- Immokalee Technical College Advisory Committee
- Florida Watermelon Association
- Glades/Hendry Interagency Council
- Southwest Florida Regional Planning Council
- Minority and Ethnic Affairs/Collier County Sheriff's Office
- Blue Zone Project

- Kiwanis Club - Naples
- Immokalee Interagency Council
- Charlotte County Collective (3C)
- Charlotte County Transportation Disadvantaged
- LeeTran Transit Development Plan (TDP) Review Committee
- Punta Gorda Housing Authority
- Community Action Agency Advisory Board (CAAAB)
- Fort Myers Technical College, Student Advisory Committee
- Charlotte County SHRM / Workforce Readiness Board
- Charlotte County Entrepreneurial Support Organization
- Charlotte Technical College Advisory Board
- Together Charlotte – Three committees (Data, Stakeholders and Steering)
- Southwest Florida Regional Technology Partnership
- FGCU's Small Business Development Center
- Southwest Regional Manufacturers Association (SRMA)
- Florida SouthWestern State College School of Business Advisory Board
- Southwest Florida Regional Tech Partnership

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

Board and Center staff works with local economic development organizations to assist new and growing businesses throughout the Local Workforce Development Area (LWDA). Representatives of our local economic development organizations participate in industry-specific focus groups and surveys conducted by CareerSource Southwest Florida. We will continue to partner with the local economic development offices to host and/or participate in focus groups and summits designed to align educational programs with the needs and emerging needs of business.

CareerSource Southwest Florida has representation on boards and committees for the Southwest Florida Regional Planning Council, economic development councils/boards, the Southwest Florida Regional Manufacturer's Association and the Southwest Florida Regional Technology Partnership, etc.

The Lee Entrepreneurs' Assistance Resource Network (LEARN) was formed late 2015 and was officially launched to the public April 2016. The founding partners: Florida Gulf Coast University's Small Business Development Center, SCORE, Lee County Economic Development, Florida SouthWestern State College and CareerSource Southwest Florida, developed LEARN to provide a single point of contact for starting and existing businesses to grow and thrive. Since then, more than ten affiliate partners have been added, a website has been developed and released, promotional materials produced, and most recently, media coverage. LEARN has developed a sector strategy approach. In addition to providing a virtual one-stop approach to serving businesses, LEARN will also allow us to track requests for assistance and outcomes in order to identify any gaps and to improve our services to businesses.



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

Priority Reemployment Planning (PREP) is offered in the CareerSource Southwest Florida center in Fort Myers. A Department of Economic Opportunity (DEO) staff person receives the PREP list weekly which includes information on unemployment insurance claimants most likely to exhaust their unemployment compensation benefits prior to securing employment. Claimants are contacted and scheduled for a group PREP Orientation and workshop which is scheduled weekly. The group PREP Orientation and workshop offer information on internet sites available for unassisted job search and our website for hiring events, occupational training opportunities and partner services. Information is also provided on services available at the Center such as job search workshops, computer workshops, assessment, individual counseling, job development and job referrals.

Those selected for PREP will receive, at a minimum, an assessment and orientation service. More intensive reemployment services are provided as needed on a one-to-one basis. Documentation is made in Employ Florida (EF) indicating attendance and case notes, as necessary. This information is then available to any Center staff to assist these individuals in securing services and employment. These reemployment efforts help to reduce the duration of unemployment claims. Information regarding a job applicant's refusal to accept a referral to a job, refusal to accept employment, failure to report for an interview or failure to report as directed for reemployment services is documented in EF.

Staff in all CareerSource Southwest Florida centers assists the general claimant population in registering for work and in becoming quickly reattached to the workforce. Services offered will include job preparation, employment workshops, provision of industry-specific labor market information, occupational training and direct referral to employers. A dedicated telephone line is available in the resource rooms of all centers, to accommodate claimants in contacting Reemployment Assistance. Services at the CareerSource Southwest Florida centers are well integrated. Staff is either prepared to directly assist claimants in accessing Workforce Innovation and Opportunity Act (WIOA), Welfare Transition Program (WTP) and other program services or will rapidly refer claimants to other staff specialized in these service areas.

Rapid Response activities: Upon receipt of a Worker Adjustment and Retraining Notification (WARN) or upon learning of a dislocation event, contact is made with the employer. Employers not meeting the requirements of WARN may also be offered information sessions. Staff explains what assistance and services can be made available and then schedule informational sessions for employees. If necessary, multiple information sessions are scheduled at the convenience of the dislocated workers and are held at the employer's site. Information for affected employees may include:

- Survey of affected workers to determine specific reemployment service needs;
- Provision of information on Reemployment Assistance/unemployment compensation benefits, comprehensive One-Stop system services, current business trends and opportunities, financial counseling, and employment and training activities, including information on Trade Adjustment Assistance (TAA);

- Provision of guidance and/or financial assistance in establishing a labor-management committee voluntarily agreed to by labor and management, or a workforce transition committee comprised of representatives of the employer, the affected workers, and the local community;
- Provision of emergency assistance adapted to the particular closing, layoff or disaster.
- After the information sessions most activities will take place at Centers. Center staff is made aware of the mass layoff or closure so that they may anticipate and prepare for the arrival of the dislocated workers at the Center. The dislocated workers will have access to resource rooms, workshops, and staff to assist them in completing their work search activities.

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

Priority of service will include awareness of entitlement to services as well as the provision of services. Board staff will ensure that priority of service is applied by sub-recipients of funds, if applicable.

When it is determined that funds are limited, our policy for Priority of Services requires that priority be given to recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient. The process to determine availability of funds will be through the One-Stop Leadership Team reviewing the budget and obligations. Any recommendation for change by the One-Stop Leadership Team will then be reviewed by the Finance Committee and then forwarded to the full Board for approval.

The Board has also established persons with barriers for priority of services. Therefore, an adult who meets one or more of the following criteria will have priority for training:

- A. receives, or is a member of a family that receives, cash payments under a Federal, State, or local income-based public assistance program;
- B. received an income, or is a member of a family that received a total family income, for the 6-month period prior to application for the program involved exclusive of unemployment compensation, child support payments, payments described subparagraph (A), and old-age and survivors insurance benefits received under section 202 of the Social Security Act that, in relation to family size, does not exceed the higher of –
  - i. the Federal Poverty Guidelines, for an equivalent period; or
  - ii. 70% of the Lower Living Standard Income Level (LLSIL), for an equivalent period;
- C. is a member of a household that receives (or has been determined within the 6-month period prior to application for the program involved to be eligible to receive) Food Assistance Benefits pursuant to the Food Stamp Act of 1977;

- D. qualifies as a homeless individual, as defined in subsections (a) and (c) section 103 of the Stewart B. McKinney Homeless Assistance Act;
- E. is a foster child on behalf of whom State or local government payments are made;
- F. in cases permitted by regulations promulgated by the Secretary of Labor, is an individual with a disability whose own income meets the requirements of a program described in subparagraph (A) or of subparagraph (B), but who is a member of a family who does not meet such requirements. A person with disabilities may be designated as a family of one for the purposes of calculating family income.
- G. is an individual with substantial cultural or language barriers; offenders; school dropouts who are basic skills deficient and lack a GED, and substance abusers whose income meets the requirements of a program described in subparagraph (A) or of subparagraph (B).
- H. is an older individuals (55 and older) that, in relation to family size, does not exceed 185% of the Lower Living Standard Income Level (LLSIL).
- I. is a Veteran that, in relation to family size, does not exceed 185% of the Lower Living Standard Income Level (LLSIL).
  - i. Veterans and eligible spouses shall be identified at the point of entry at each Center and given an opportunity to take full advantage of priority of service for qualified job training programs.
  - ii. Veterans and eligible spouses shall be made aware of the following and may be provide written information, as determined appropriate:
    - their entitlement to priority of service;
    - the full array of employment, training, and placement services available under priority of service; and
    - any applicable eligibility requirements for those programs and/ or services.

**(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)).**

Classroom training is provided by approved training providers on the Eligible Training Providers List (ETPL) as indicated in Part (6) of this Section. Training Provider Agreements are executed once Training Provider Applications are reviewed by the Program and Planning Committee and approved by the full Board of Directors.

Individual Training Accounts (ITAs) are used as an agreement between the educational institution, the student and CareerSource Southwest Florida for each WIOA Adult and Dislocated Worker student funded. An Authorization for Training (Non-ITA Training Only) form is used as an agreement for students funded through Welfare Transition, Supplemental

Nutrition Assistance Program (SNAP), Trade Adjustment Act (TAA), WIOA Out-of-School Youth and other special grants.

**(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)).**

The Eligible Training Provider List (ETPL) is made available to One-Stop customers to encourage choice in training selection and use of Individual Training Accounts. In addition to information about the educational institution, the ETPL contains information on each program as follows: demand occupation (from the current Regional Targeted Occupations List) to which the program links, program length, program cost, type of degree or certification, completion rates, employment rates and wage rates. The information will be ample for a customer to understand the options available in choosing a program of training services. In consultation with a Career Development Representative (CDR), a participant will be allowed to select the program most desired according to such factors as costs within established guidelines, geographic location and scheduling considerations.

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

Employed and/or unemployed adults and dislocated workers, age 18 and older, who have met eligibility requirements and have received at least one "career service" and who have been determined to be unable to obtain or retain employment through career services may qualify for training services, within the Board's priority of services guideline. Eligible WIOA Youth determined in need of training may be co-enrolled as Adults for purposes of using an Individual Training Account (ITA).

After an interview, evaluation/assessment, and case management, the participant must be determined to be in need of training services and to have the skills and qualifications to successfully complete a selected training program. This information will be documented through the development of an Individual Employment Plan, Individual Responsibility Plan or Individual Services Strategy for the participant. This Plan is an ongoing strategy jointly developed by the participant and the CDR that identifies the participant's employment goals, the appropriate achievement objectives, and the appropriate combination of services for the participant to achieve the employment goals.

A selection may be made by the participant of a training program that is directly linked to the employment opportunities either in the local area or in another area to which the individual is willing to relocate, in accordance with policy guidelines. A program of training services is one or more courses or classes that, upon successful completion, lead to:

- a) a certificate, an associate degree, or baccalaureate degree, or
- b) a competency or skill recognized by employers

The CDR is responsible for establishing an Individual Training Account (ITA) in accordance with policy and according to availability of funding. The CDR must document in the Individual Employment Plan that assessment indicates the participant is in need of the training services and has the skills and qualifications to successfully complete the selected training program. As appropriate, participants must also seek grant assistance from other sources to pay or

assist with the costs of training, including Pell Grants within the guidelines of 663.320, or subsequent policy. Staff continues to diligently coordinate Pell and other education grants, to ensure these are applied for and used prior to the expenditure of Workforce Innovation and Opportunity Act (WIOA) dollars. Upon establishment of the ITA, a referral will be carried out by providing a voucher or certificate to the individual, to be used with the training provider.

The total value, provided funds are available, of an ITA will be the amount required for tuition, fees, books, tools, uniforms, safety equipment, and any other general requirement needed for the course of occupational skills training. The limitation will be based on the needs identified in the Individual Employment Plan. Supportive services such as child care, transportation, and other miscellaneous non-training related expenses may not be included in the ITA. Supportive services may be available for TANF participants, according to the Welfare Transition Supportive Services Policy. An ITA is payable to the training provider. The ITA may be closed at any time it is determined that the participant is not successfully meeting training requirements.

In addition to training with eligible providers in LWDB 24, ITAs may be used for training with providers on the State's Eligible Training Provider list in other areas of the state, with primary consideration for training in contiguous LWDAs.

**A. Describe any ITA limitations established by the board;**

The total Individual Training Account (ITA) dollar limit will be established annually based on the availability of training funds and is currently set according to the Occupational Education Requirement Categories as defined by the Florida Department of Education:

- \$6,500 for Education Code 3 - Post Secondary Adult Vocational Certificate programs;
- \$8,000 for Education Code 4 - College Credit Certificate, Applied Technology Diploma, Associate of Applied Science, Associate Degree programs;
- \$10,000 for Education Code 5 - Bachelor Degree programs.

An ITA may be used for training for up to two years after enrollment into the core program or class.

**B. Describe any exceptions to the use of ITAs.**

Training services may be provided through a contract for services in lieu of ITAs for the following:

- On-the-Job Training provided by an employer or Customized Training;
- Training services of demonstrated effectiveness offered by a community-based organization or another private organization to serve a special participant population that faces multiple barriers to employment.

The State has been granted a waiver to the Prohibition on Use of Individual Training Accounts for older and out-of-school youth. CareerSource Southwest Florida uses the State's waiver to allow provision of Individual Training Accounts (ITAs) for Older Youth

and Out-of-School youth. These youth will be assessed to determine that an ITA is the appropriate and best strategy. Educational programs used will be those from CareerSource Southwest Florida's Eligible Training Provider List and the Short-term List of Programs for Welfare Transition and Out-of-School Youth.

**(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)).**

CareerSource Southwest Florida partners with Florida Gulf Coast University's Small Business Development Center (SBDC), which provides entrepreneurial workshops and assistance to small business persons or to those wishing to open new businesses in the area. Business Services works with local economic development offices on entrepreneurial events.

CareerSource Southwest Florida has been an integral part of the Glades County Regional Training Center (GCRTC) which will house warehouse, distribution and manufacturing areas. Truck driver testing is currently available onsite and partners are considering truck driver training. Classrooms and offices are available for educational partners, economic development, and CareerSource Southwest Florida staff.

In partnership with Collier County and its economic development office, CareerSource Southwest Florida established an economic incubator/accelerator in Naples to facilitate the growth and creation of business enterprises. To get the project off the ground, Economic Incubators, Inc. c/o CareerSource Southwest Florida acted as the administrative entity for the Collier Soft Landing Accelerator/Incubator Strategy. This included hiring, leasing space, procurement of equipment, supplies goods and services, fiscal management, reports and audits. The operation was then turned over to Collier County, which continues to administer the Accelerator/Incubator for the area. The program has since been expanded by Collier County to include The Florida Culinary Accelerator @ Immokalee; an FDA-approved, membership-based commercial kitchen and processing facility.

Representatives of our local economic development organizations participate in industry-specific focus groups and surveys conducted by CareerSource Southwest Florida. Staff will continue to participate in economic gardening activities and initiatives with our economic development partners in determining emerging occupations and employment needs.

**(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.**

For over fifteen years, our Eligible Training Providers List has included State of Florida, Department of Education (DOE) Registered Apprenticeships offered through the Donna J. Beasley Tri-County Apprenticeship Academy (DJBTCOA). Currently the ETPL includes Apprenticeships for 1) Electrician, 2) Heating Air Conditioning Installer/Service, 3) Fire Sprinkler Fitter, 4) Pipefitter and 5) Plumber. Although little or no workforce funding is

generally needed, this bring awareness to participants seeking training and/or employment. This year we have added a new State Registered Child Care Development Specialist Apprenticeship with Community Connection Services, Inc.

With ApprenticeshipUSA Expansion Grant funding, three pre-apprenticeships are now being offered through DJBTCAA for 1) Electrician, 2) Heating Air Conditioning Installer/Service, and 3) Plumber. These registered pre-apprenticeship programs start with a Core Curriculum Certification followed by a Craft Certification in one of the three trades and provide an avenue for adults to become qualified to enter the registered apprenticeship programs.

A representative of an electrical apprenticeship program affiliated with the International Brotherhood of Electrical Workers (IBEW) serves on our Board and our Service Delivery Committee. The DJBTCAA has representation on the Board's Youth Council.

**(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).**

As described in Part (5) F. of this Section, CareerSource Southwest Florida received funding for one of the state's Sector Strategies Initiatives. Through this grant, CareerSource Southwest Florida contracted with the Southwest Florida Regional Technology Partnership to survey businesses to identify the critical needs of the Information Technology (IT) industry, IT professionals and the businesses in Southwest Florida who employ IT professionals. Short-term training and testing geared toward attainment of identified certifications has been provided to adults, dislocated workers, youth and incumbent workers.

The District School Board of Collier County received a \$3 million Florida Job Growth Grant to expand the Immokalee Technical (I-Tech) College's existing machining program to a new centrally located satellite campus and to create additional advanced manufacturing programs. They are operating in a new temporary facility while plans are finalized to build a 40,000 to 50,000 square-foot facility to house the Southwest Florida Manufacturing Excellence Center in Collier County. Business Services staff are members of the advisory committee and this initiative has the support of the Southwest Florida Regional Manufactures Association.

Our Business Services Division continues outreach efforts to educate employers about Internships, Customized Training, work-based training and On-the-Job Training (OJT) opportunities for eligible individuals. The Board also recognizes the need for workplace soft skills/fundamental skills/living skills as reported in meetings, surveys and focus group activities. CareerSource Southwest Florida centers, in concert with community partners, continue to provide workshops to encourage worksite appropriate behavior, communication and dress along with the elements of teamwork. Industry focus group discussions have also challenged training providers and educators to include or emphasize fundamental skills to students in the classroom, laboratory and clinical curricula. This emphasis of workplace skills during training demonstrates the effectiveness of partnership response.

As the direct provider of services, improved coordination has resulted in more focused outreach to businesses. Business Services has successfully operated a Family Relocation

Assistance Program to help relocated spouses and partners find work in Southwest Florida. Services include job referrals, networking through the Professional Career Network (PCN), career support, résumé critique, career counseling, seminars and workshops. The program has opened doors to businesses we've never worked with before.

The locally-developed iCareer (Individualized Career) service delivery model, identified in Part (3) of this Section, assists with developing career pathways by offering customers the opportunity to acquire, at a minimum, two levels of employability skill sets. Depending upon where the individual is in his/her career path development, these may include foundational skills, short-term certificate/credential, occupational/vocational certificate, college degree. iCareer makes use of Employ Florida's Career Explorer Career Interest Assessment exploration of careers, completing an Occupational Skills Gap Analysis to compare current skills with those needed for occupation(s) of interest, as well as work experience and job shadowing activities.



As detailed in Part (7) of Coordination of Services, staff has developed a career pathways initiative for Welfare Transition (WT), Supplemental Nutrition Assistance Program (SNAP) and Workforce Innovation and Opportunity Act (WIOA) In-School Youth (OSY) who are Temporary Assistance for Needy Families (TANF) eligible. The program activity guide combines Metrix Learning with locally-provided employability skills activities and workshops. The Metrix Learning My Plan Pathway work skill courses provide the opportunity to 1) select an industry path and occupation linked to a career goal; 2) complete a simple skill gap assessment; and 3) review and assign work skill courses recommended to assist with overcoming skill gaps.

**(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)).**

The Board conducts monitoring of all programs operated by subrecipients and by Board staff at the One-Stop Centers. Monitoring will be conducted through computer desk audits and on-site visits. Cases will be continuously monitored by Center staff utilizing a multiple layer approach; peer reviews, supervisory review and a management review in accordance with



the contract and performance benchmarks. In addition, the Board's contracted monitoring consultant will review accuracy of case management throughout the year. In addition to reviewing documentation in case files (paper and electronic) staff will monitor the overall flow of services in the One-Stops, compliance issues and customer satisfaction. As deemed necessary, Board staff and/or the contracted monitoring consultant may require responses and corrective actions from staff. As noted previously in the Board's goals and priorities, the Service Delivery Committee provides oversight and monitors all programmatic services. The Youth Council also assists staff in reviewing youth activities on a regular basis.

Performance information is requested from schools on the Eligible Training Providers List (ETPL). The Program and Planning Committee is tasked with monitoring occupational training programs included on the ETPL to assure that those skills attained from the training curriculum meet or exceed the local employers' workforce needs. Performance, to include Employment Rates, is reviewed and the Committee recommends suspension of programs, requests for improvement plans or thanks, as determined appropriate. This program performance, such as Program Completers, Found Employment Rate and Average Wage at Placement into Employment is also made available to the public on our website.

**(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)).**

As noted in Part (6) of the Analysis of Need and Available Resources, the 14 program elements are made available to youth in our WIOA Youth programs. The program design for the WIOA Youth program includes Out-of-School Youth services provided by our Destination Career\$ staff located in the CareerSource Southwest Florida centers and In-School Youth services provided by our Destination Graduation staff located in high schools throughout the Local Workforce Development Area (LWDA). Destination Graduation staff also provide some of the services to Out-of-School Youth.

The enrollment process includes orientation, eligibility determination, an objective assessment where TABE testing and an Individual Services Strategy is completed, and then determining an appropriate track or tracks for the youth. The Youth Tracks for Destination Career\$ and Destination Graduation are:

Education Track – for youth in need of General Education Diploma (GED). Services may include but are not limited to:

- Tutoring;
- Study Skills instruction;
- TABE assessment;
- GED classes;
- Successfully obtaining GED or high school diploma.

Work-based Training Track – uses a variety of paid Work Experience to help youth attain and/or improve Work Readiness Skills and obtain unsubsidized gainful employment.

- Career exploration and assessment
  - work skills assessment
  - interest inventory
  - labor market information search;
- Employment Preparation
  - iCareer Life Skills
  - Work Experience – Can be in conjunction with GED. Currently for Out-of-School Youth (OSY) – 480 hours @ \$10.50/hour. Depending on the economic climate the hours and wages may be adjusted to coincide with labor market as closely as possible to ensure youth are exposed to real life work experience.
  - On-the-Job Training (OJT). Reimbursement to employer up to 75%
  - Other subsidized employment.
- Successfully gains unsubsidized employment or entrance into military.

Credentialing Track – training for industry-recognized credentials linked to demand occupations

- Career exploration
  - Interest inventory
  - Labor market information search
  - TABE testing
  - Job shadowing
- Enrollment in training program
  - Financial aid steps completed
  - Registration completed
  - Classes scheduled
- Earn certificate or credential

The development of the Individual Service Strategy (ISS) is the foundation for serving WIOA Youth. The ISS is an ongoing strategy, jointly developed by the youth and staff, that identifies employment goals, achievement objectives and the appropriate combination of services for the youth to achieve these goals.

Our Destination Graduation program provides intensive drop-out prevention services to WIOA-eligible, in-school youth. Details are outlined in Part (6) of the Analysis of Need and Available Resources.

Staff may utilize the iCareer (Individualized Career) service delivery model detailed in Part (14) of this Section, as well as, the program activity guide for Metrix Learning Soft Skill Cluster Courses as detailed in Part (7) of Coordination of Services to assist youth in designing a career path and acquiring in-demand skill sets in an occupation of interest and identify potential future career laddering opportunities.

- 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).

Youth enrolled in the program are provided the Test of Adult Basic Education (TABE). A youth who TABE-tests as academically deficient (below a 9th grade level for Math and/or Reading) is considered “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.”

- 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).

CareerSource Southwest Florida’s local definition for youth requiring additional assistance to complete an education program or to secure and hold employment is any youth who had difficulty functioning in the regular school program and having a high probability of not maintaining grade level or not succeeding in such a program including youth with disability, or any youth lacking the basic or employability skills to secure and hold employment; including youth with disabilities. This may include a Florida Standard Assessment (FSA) score below the required numeric rating for that school district (NOTE: LWDB 24 has five school districts); excessive absences or disciplinary actions as determined by that school district; work history less than that required to qualify monetarily for unemployment compensation; or a domestic violence issue as documented through an agency or through self-attestation. CDRs determine this through documentation from educational institutions or other organizations which may include attendance records, FSA scores, disciplinary actions and family situations. These factors/barriers are evaluated and documented in the case notes by the CDRs.

**SIGNATURE PAGE**

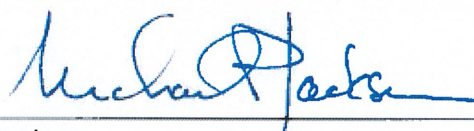
This Local Workforce Plan represents the efforts of CareerSource Southwest Florida to implement the Workforce Innovation and Opportunity Act (WIOA) in the following counties:

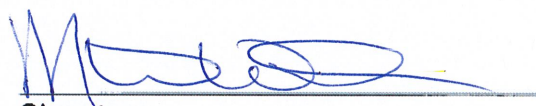
- Charlotte
- Collier
- Glades
- Hendry
- Lee

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

**Workforce Development Board Chair**

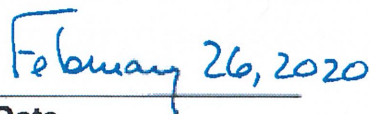
**Chief Elected Official**

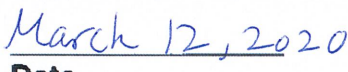
  
Signature

  
Signature

**Michael P. Jackson**  
President

**Commissioner Mitchell Wills**  
Chairman of the Hendry County  
Board of County Commissioners  
and the Southwest Florida Job  
Training Consortium

  
Date

  
Date

## ATTACHMENTS

**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);**

Attachment A - Memorandum of Understanding for One-Stop partners. The current Memorandum of Understanding (MOU) with One-Stop partners expires June 30, 2020. A new MOU for July 2020 is being circulated for comment and will be forwarded with signatures upon completion.

**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);**

Attachment B – The July 2017–June 2020 Infrastructure Funding Agreement (IFA) was a separate document but is now included in Attachment A, the new MOU for July 2020–June 2024. The current IFA expires June 30, 2020. The new IFA being developed for July 2020 will be forwarded upon completion.

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

Attachment C – Third Amended and Restated Interlocal Agreement for the Southwest Florida Job Training Consortium, valid through June 30, 2022.

**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.**

Attachment D – The current Extension to Provide Direct Services expires June 30, 2020. A new extension for July 2020 – June 2023 has been posted for public comment and will be forwarded with appropriate signatures upon completion.

**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;**

Attachment E-1 – Current Board Member Roster  
Attachment E-2 – Board Meeting Minutes from January 8, 2020 which include agenda item, discussion, and vote.

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

Attachment F – Public comments received and changes made.

- 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;**

Attachment C – The Third Amended and Restated Interlocal Agreement for the Southwest Florida Job Training Consortium, which is valid through June 30, 2022, 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;**

Attachment C – The Third Amended and Restated Interlocal Agreement for the Southwest Florida Job Training Consortium valid through June 30, 2022.

- 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;**

Attachment G – Bylaws of Southwest Florida Workforce Development Board, Inc.

**Memorandum of Understanding  
for  
Workforce Innovation and Opportunity Act (WIOA)  
One-Stop Career Center System  
Partners of the American Job Center Network**

This Memorandum of Understanding (MOU) is made pursuant to the Workforce Innovation and Opportunity Act (WIOA) of 2014, and is entered into by the American Job Center Network Partners:

Local Workforce Development Board LWDB): **CareerSource Southwest Florida, LWDB-24**  
Chief Elected Official (CEO) Name, Title: **Michael Swindle, Commissioner**

**Required Partners**

<b>Partner Name</b>	<b>Program</b>	<b>Program Authority</b>
CareerSource Southwest Florida	WIOA Adult, Dislocated Worker, and Youth Programs; Employment Service; Trade Adjustment Assistance (TAA) Activities; Temporary Assistance for Needy Families (TANF) program; Jobs for Veterans State Grants (JVSG) - LVER & DVOP	WIOA Title I – Adult, Dislocated Worker, and Youth Programs; Wagner-Peyser Act (29 U.S.C. 49 et seq.) as amended by WIOA title III; Chapter 2 of title II of the Trade Act of 1974 (19 U.S.C. 2271 et seq.); Part A of title IV of the Social Security Act (42 U.S.C. 601 et seq.), under 20 CFR 678.405(b); Chapter 41 of title 38, U.S.C. / WIOA 121(b)(1)(B)(viii).
FLDOE / Division of Vocational Rehabilitation	State Vocational Rehabilitation (VR) Services program	Title I of the Rehabilitation Act of 1973 (29 U.S.C. 720 et seq.) as amended by WIOA title IV, (other than section 112 or part C of title I of such Act (29 U.S.C. 732, 741);
FLDOE / Division of Blind Services	State Blind Services	Title I of the Rehabilitation Act of 1973 (29 U.S.C. 720 et seq.) as amended by WIOA title IV, (other than section 112 or part C of title I of such Act (29 U.S.C. 732, 741);
Charlotte County Public Schools Collier County Public Schools Glades County School District Hendry County Schools School District of Lee County	Adult Education and Literacy Act (AEFLA) programs	Adult Education and Literacy (WIOA 121(b)(1)(B)(iii)) – Title II
Charlotte County Public Schools Collier County Public Schools Glades County School District Hendry County Schools School District of Lee County	Career and Technical Education programs - post-secondary level	Carl D. Perkins Career and Technical Education Act of 2006 (Perkins IV), (20 U.S.C. 2301 et seq.)
AARP Foundation	Senior Community Service Employment Program (SCSEP)	Title V of the Older Americans Act of 1965 (42 U.S.C. 3056 et seq.)
Cornerstone Solutions	Job Corps	WIOA Title I – Job Corps (29 USC 2881-2900, 29 USC 2901)
none available	Employment and training	Department of Housing and Urban Development (HUD) / (WIOA 121 (b)(1)(B)(xi))
Lee County Department of Health and Human Services	Employment and training activities under CSBG programs	Community Services Block Grant (42 USC 9901 et seq.)
Collier County Public Schools/ Immokalee Technical College (iTECH)	Farmworker Career Development Program (FCDP) - Migrant and seasonal farmworker programs	WIOA Title I – Migrant and Seasonal Farm Worker Programs (29 USC 2912, 29 USC 2919)
FL Department of Economic Opportunity (DEO)	Unemployment compensation (Reemployment Assistance)	State unemployment compensation laws (in accordance with applicable Federal law)

They are collectively referred to as the “Parties” to this MOU. This MOU will be in effect from July 1, 2017, through June 30, 2020, unless an extension is granted.

The purpose of this MOU is to describe the cooperative workforce training, employment and economic development efforts of CareerSource Southwest Florida and the Partners and the actions to be taken by each to assure the coordination of their efforts in accordance with state issued requirements in order to establish and maintain an effective and successful "One-Stop" delivery system.

This agreement is intended to coordinate resources and to prevent duplication and ensure the effective and efficient delivery of workforce services in Southwest Florida. In addition, this agreement will establish joint processes and procedures that will enable the Partner to integrate with the current one-stop service delivery system resulting in a seamless and comprehensive array of education, human service, job training, and other workforce development services to persons within Southwest Florida.

The parties to this document agree to coordinate and perform the activities and services described herein within the scope of legislative requirements governing the parties' respective programs, services, and agencies. The Southwest Florida Workforce Development Board, Inc., dba CareerSource Southwest Florida has been designated by the chief elected official as the administrative entity, grant recipient and fiscal agent.

All Local Workforce Development Boards (LWDBs) are required to establish and operate local service delivery systems in accordance with WIOA Section 121, with the WIOA State Plan, and with the WIOA Local Plan for their respective local areas. WIOA Section 134(c) lists the services and activities that must be provided through the delivery system. WIOA Section 107(d) gives the LWDBs the responsibility for oversight of the delivery system in each local area and requires the LWDBs to describe the activities and functions of the service delivery system and to prescribe the guidelines for carrying out these responsibilities in the Local WIOA Plan.

<b>One-Stop Centers</b>		
	<b>Address</b>	<b>Full-Service or Satellite</b>
1	750 South 5th Street, Immokalee, FL 34142	Full-Service
2	215-B South Francisco Street, Clewiston, FL 33440	Full-Service
3	4150 Ford Street Extension, Fort Myers, FL 33916	Full-Service
4	3050 Horseshoe Drive North, Building A, Suite 110, Naples, FL 34104	Full-Service
5	3745 Tamiami Trail, Port Charlotte, Florida 33952	Full-Service
6	1020 Cultural Park Boulevard, Cape Coral, FL 33990	Satellite
7	921 Anvil Circle, LaBelle, FL 33935	Satellite



<b>Administrative Structure</b>			
	<b>Entity Name &amp; Contact</b>	<b>Address</b>	<b>Email</b>
<b>Administrative Entity</b>	Southwest Florida Workforce Development Board, Inc. dba CareerSource Southwest Florida, Joe Paterno	9530 Marketplace Road, Suite 104 Fort Myers, FL 33912	jpaterno@sfwdb.org
<b>Fiscal Agent</b>	Southwest Florida Workforce Development Board, Inc. dba CareerSource Southwest Florida, Mike Egan	9530 Marketplace Road, Suite 104 Fort Myers, FL 33912	megan@sfwdb.org
<b>Chief Elected Official</b>	Commissioner Mike Swindle	Hendry County BOCC P O Box 1760 LaBelle, FL 33975-1760	swindlem@hendry-schools.net
<b>One-Stop Operator</b>	Tracy Lansberry	8509 Brittani Drive Fort Myers, FL 33912	Tracy1948@hotmail.com

### **Partner Responsibilities**

- A. WIOA Section 121 (b) lists the minimum responsibilities of all required partners under WIOA. For consistency, all Partners will assume the responsibilities identified below, unless inconsistent with the federal law and regulations that authorize the Partner program.
1. Make career services provided under the Partner's program available to individuals through the area's delivery system in accordance with this MOU.
  2. Participate in infrastructure cost-sharing activities as described in this MOU and use a portion of funds made available to each partner's program—to the extent not inconsistent with the federal law that authorizes each partner program—to:
    - a. Create and maintain the delivery system; and
    - b. Provide career services per WIOA Section 134(c)(2).
  3. Remain as a party to this MOU throughout the Agreement period in order to participate as a partner per WIOA Section 121(c).
  4. Participate in the operation of the system in accordance with the terms of this MOU and with the requirements of authorizing laws per WIOA Section 121(b)(1)(B).
  5. Required Partners must provide representation on the area's LWDB per WIOA Section 121 (b)(1). Additional partners may participate on the Area's LWDB with the agreement of the Area's LWDB members and CEO. However, when a program is administered by more than one entity in the area, it is not necessary that every entity provide representation on the LWDB. One entity may provide representation on the LWDB for the program.
- B. In addition to the minimum responsibilities required under WIOA as identified in Section A, Partner responsibilities include:
1. Provide priority of service to veterans and covered spouses for any qualified job training program pursuant to the Jobs for Veterans Act as prescribed in 38 USC 4215.

2. Compliance with WIOA and all federal, state, and local laws, regulations, rules, policies and plans applicable to parties in their respective roles under this MOU and as consistent with the rules that govern each partner's respective program. Each partner expressly agrees to notify LWDB of any changes to the rules governing its respective program that impact the partner's performance under this MOU. LWDB will communicate the changes to the operators and any other affected partners.
3. Each partner must ensure compliance by its staff members who work in the One-Stop center with CareerSource Southwest Florida policies and procedures. Should a conflict exist between the CareerSource Southwest Florida personnel policies and a partner's personnel policies, the partner's policies will prevail.
4. Use of common practices and procedures; forms and documents; software systems or applications; and other forms of media as agreed to by all parties in the performance of One-Stop center services and activities and functions that support the service delivery system.

### **Programs, Services, & Activities**

- A. WIOA Section 121(b)(1)(B) identifies the programs, services and related activities that must be provided through the delivery system in each local area. WIOA Section 121(c)(2) requires this MOU to include a description of the services that will be provided through the area's service delivery system and to identify the service delivery method(s) each partner will use to deliver the services. This MOU will also identify the career services, training, and employer services that each partner will provide to ensure that all parties' responsibilities are clearly identified herein.
- B. The One-Stop Services hereby incorporated, lists and describes the career, training, and employer services and the array of service delivery methods.

#### **Career Services offered include:**

1. WIOA Adult, Dislocated Worker, and Youth
2. Temporary Assistance for Needy Families (TANF)
3. Supplemental Nutrition Assistance Program (SNAP)
4. Employment services authorized under the Wagner-Peyser Act
5. Vocational Rehabilitation
6. Blind Services
7. Migrant and seasonal farmworker (MSFW)
8. Senior Community Service Employment Program (SCSEP)
9. Ticket to Work
10. Disabled Veterans' Outreach Program (DVOP)

#### **Training Services offered include:**

1. Adult education and literacy
2. Job Corps
3. Florida Farmworker Jobs and Education Program
4. Career and technical education programs at the post-secondary level
5. Department of Housing and Urban Development employment and training activities
6. Trade Adjustment Assistance (TAA) activities

#### **Employer Services offered include:**

1. Business Services
2. Recruitment assistance for employers
3. Scheduling, screening and testing for employers

## Required Partner Services

Partner Name	Program Name	Services Offered (from page 2)			Service Delivery Method (from page 4)	Location Code (from page 2)
		Career	Training	Employer		
CareerSource Southwest Florida	WIOA Adult, Dislocated Worker, and Youth Programs ; Temporary Assistance for Needy Families (TANF) program	1, 3, 7		1, 2, 3	FT	1-5
		2			FT	1-5
Job Corps, USDOL	Job Corps		2			1-7
Collier County Public Schools/ Immokalee Technical College (iTECH)	National Farmworker Jobs Program (Migrant and seasonal farmworker programs)		3		PT, T, B	1, 2, 7
DEO through CareerSource Southwest Florida	Employment Service ; Trade Adjustment Assistance (TAA) Activities ; Jobs for Veterans State Grants (JVSG) - LVER & DVOP	4		1, 2, 3	FT	1-7
			6		FT	1-7
		10			FT	1-5
AARP Foundation	Senior Community Service Employment Program (SCSEP)	8				1, 3, 4, 5
FL Department of Economic Opportunity (DEO)	Unemployment compensation (Reemployment Assistance)					1-7
Charlotte County Public Schools Collier County Public Schools Glades County School District Hendry County Schools School District of Lee County	Adult Education and Literacy Act (AEFLA) programs		1		T, B	1-7
	Career and technical education programs - post-secondary level		4		T, A, B	1-7
FLDOE / Division of Vocational Rehabilitation	State Vocational Rehabilitation (VR) Services program	5			FT, PT, T, A, B	1-7
FLDOE / Division of Blind Services	State Blind Services	6			T, A, B	1-7
Lee County Department of Housing and Urban Development (HUD)	Employment and training		5		T, B	3, 6
Lee County Department of Health and Human Services	Employment and training activities under CSBG programs				T, B	3, 6

**Required Partner Services:** The table above identifies the services each required partner will provide and the method(s) of service delivery each partner will use. The services are identified by the corresponding numbers listed for each service in the Services Document. The service delivery methods are identified by the following service delivery codes: FT - On-Site Staff Full Time, PT - On-Site Staff Part Time, C - Contracted Service On-Site Full Time, C/PT - Contracted Service On-Site Part Time, C/Off - Contracted Service Off-Site, T - Access Via Telephone, A - Access Via Automated System, B - Brochure/Handout, P - Posting at One-Stop Center, O – Other and NA - Not Applicable.

## **Method of Referral**

Pursuant to WIOA Section 121(c)(2)(A)(iii), the parties agree that the referral of individuals between the One-Stop partners' for the services and activities described will be performed using the following methods:

Referrals will be routinely made between programs and organizations in cases where customers served initially by one organization are deemed to be able to benefit from services provided by another organization and/or the natural continuum of service is adult education leading to postsecondary Career and Technical education to work readiness and ultimately employment.

Referrals between partners for services and programs will be made in person, by telephone, through written communications (fax, e-mail and paper referrals), or electronically through Internet systems or other connections. Some programs will use state or locally-created forms. Partners will continue to provide cross-referral to services and training as well as possible co-enrollment options whenever appropriate and practical.

Internal cross-referral procedures continue to be developed and reassessed based upon availability of funding, services and program need to ensure that high quality and convenient services are available to customers of the One-Stop system.

## **Resource Sharing/Infrastructure Funding**

### **A. One-Stop Resource Sharing/Infrastructure Requirements:**

1. WIOA 121(c)(2)(A)(ii) requires that the funding arrangements for services and operating costs of the service delivery system must be described in this MOU.
2. The methodologies described herein must be allowable under each partner's respective program and under all applicable federal and state rules—including the Office of Management and Budget (OMB) Circulars applicable to each partner's type of organization. The MOU must identify:
  - a. The shared One-Stop costs.
  - b. The methodologies that will be used to determine each party's proportionate "fair" share of those costs.
  - c. The methodologies that will be used to allocate each party's fair share of costs across the cost categories.
  - d. The method(s) each party will use to fund its fair share of costs, which may include cash contributions, contributions of staff time, equipment, and/or other resources, or in-kind contributions from a third party.

### **B. One-Stop Operating Costs:**

1. The shared operating costs, the projected cost amounts, and each party's method of funding its fair share of those costs are identified in the Infrastructure Funding Agreement, which is included in this MOU and hereby incorporated. The methodologies that will be used to determine each party's fair share of operating costs and to allocate each party's fair share are as follows:
  - a. Identification of Shared Costs;

- b. Shared Costs Budget;
- c. Proportionate Share and Cost Allocation;
- d. Resource Sharing (may include cash contributions, contributions of staff time, equipment and other resources; and
- e. Resource Sharing Agreements.

**C. Program Costs/Services:**

1. Costs allowable under and allocable to more than one partner program may be considered shared costs that are allocated among the eligible partner programs provided that such action is not prohibited by the partner programs' governing statutes. The manner(s) in which the parties agree to address costs chargeable to more than one partner program must be described in this MOU.
2. All parties expressly agree to use the following methodologies to determine if a particular cost is chargeable to more than one partner program and to address costs found to be chargeable to more than one partner in accordance with the following:
  - a. Methodology to Determine Shared Service Costs:

Square footage utilized by entity will be used as the allocation basis to determine overall Partner contributions. This was done in an effort to remedy the imbalance of non-physically represented Partners, and 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.

**D. Budget Tracking:**

1. All parties expressly understand and agree that the initial costs listed in Attachment A, the Infrastructure Funding Agreement (IFA) will be subject to change as actual costs are incurred and paid throughout the effective period of this MOU. 29 CFR 97.20 requires a comparison of actual costs to budgeted costs. Areas will determine actual costs in accordance with local procedures and will submit the actual expenditures to all partners on a quarterly basis.
2. Updates to the IFA will not require an amendment to this MOU unless such updates reflect an increase in the total budget amount. An amendment for this purpose will be signed by authorized representatives of LWDB, the CEO and all affected partners. LWDB will ensure that all partners receive a copy of the amendment and revised budget once the amendment is fully executed.
3. Any time the IFA is modified, the LWDB must provide all parties with notice of the modification and a copy of the modified IFA. The notice shall include a description of the modification, the effective date of the modification, and the reason(s) for the modification.

## Termination/Separation

- A. **MOU Termination:** This MOU will remain in effect until the end date specified unless:
1. All parties mutually agree to terminate this MOU.
  2. Funding cuts by one or more federal programs are so substantial that operations cannot continue as specified herein and a new MOU must be negotiated.
  3. WIOA regulations or statute is repealed.
  4. Local area designations are changed.
- B. **Partner Separation:** WIOA Section 121(c) mandates the execution of this MOU between the LWDB and partners. However, any single partner may terminate its participation as a party to this MOU upon thirty (30) days written notice to the LWDB. In such an event, the LWDB will provide written notice to all remaining partners and will amend this MOU. The termination of one or more partner's participation as a party will not result in a termination of this MOU unless the number or contribution of the terminating partner(s) is so substantial that it necessitates the negotiation of a new MOU.
- C. **Effect of Termination:** Per WIOA Section 121, any partner that terminates its role as a party to this MOU is no longer eligible to participate as a partner in the system and will not be permitted to serve on the LWDB as a partner representative.
- D. **Partner Disqualification:** An entity identified as a required partner at the time of execution of this MOU that subsequently loses federal funding or the authority to administer the federal program in the Area and therefore no longer qualifies as a required partner under WIOA Section 121(b)(1) must send written notice of the change in status to the LWDB as soon as possible. In such an event, a formal amendment to this MOU will be required. The entity may continue as an additional partner if mutually agreed by the LWDB, CEO, and the remaining partners.

## Amendment

- A. This MOU may be amended upon mutual agreement of the parties that is not inconsistent with federal, state, or local laws, regulations, rules, plans, or policies or for one or more of the following reasons:
1. The addition or removal of a partner from this MOU.
  2. Removal or addition of program responsibilities for any partner that administers more than one federal program.
  3. An extension of the effective ending date.
  4. A change in the One-Stop Operator or Fiscal Agent or a change in the physical location of a One-Stop center.
  5. A change in the services, service delivery methods currently utilized, referral methods, methods to determine fair share, or methods to allocate costs.

- B. All parties agree that amendments for the reasons listed in 1 and 2 of Section A need only be signed by authorized representatives of the LWDB, the CEO, and the affected partner(s). Amendments for the reasons listed in all other paragraphs or for any changes that will affect the responsibilities of all parties, require the signatures of all parties. All amendments will involve the following process:
1. The party seeking an amendment will submit a written request to the LWDB that includes:
    - a. The requesting party's name.
    - b. The reason(s) for the amendment request.
    - c. Each section of this MOU that will require revision.
    - d. The desired date for the amendment to be effective.
    - e. The signature of the requesting party's authorized representative.
  2. If the request is approved, the LWDB will notify the remaining parties of the intent to amend and will provide each remaining party thirty (30) days from the date of the notice (unless another timeframe is specified in the notice) to review the anticipated changes and to submit a response to LWDB. Failure by a party to respond within the prescribed timeframe will be deemed that party's approval of the proposed changes.
  3. In the event that a remaining party has questions and/or concerns regarding the proposed amendment, the party must list its questions and/or concerns in writing and submit the list to LWDB within the specified timeframe.
  4. LWDB will review the listed questions/concerns and will issue a response within fifteen (15) days of receipt of the list. If LWDB deems it necessary, the listed questions/concerns will be sent to all other parties and/or a meeting with all parties will be scheduled to discuss the proposed changes and to achieve consensus on a final amendment draft.
  5. The final, approved amendment draft will be signed by authorized representatives of the affected partners, then submitted to LWDB for the final signature.
  6. LWDB will distribute copies of the fully executed amendment to all parties and to CareerSource Florida as the MOU oversight agency upon execution.
- C. This writing constitutes the entire agreement among the parties with respect to each party's role and responsibility in the area's service delivery system. All parties agree that any amendments to any applicable laws or regulations cited herein will result in the correlative modification of this MOU without necessitating a formal, written amendment.
- D. All parties agree to communicate details of the amendment to their respective staff members whose responsibilities may be impacted by changes and further agree to ensure that their respective staff members are referencing or utilizing the most current version of the MOU in the performance of responsibilities under this MOU.

- E. Amendments that will require the signatures of all parties must be executed no later than ninety (90) days prior to the end of the MOU period and amendments that require only the signatures of the LWDB, the CEO, and the affected parties must be executed no later than 45 days from the end of the current State Fiscal Year.

## **Confidentiality**

All parties expressly agree to abide by all applicable federal, state, and local laws regarding confidential information. Each party will ensure that the collection and use of any information, systems, or records that contain personally identifiable information will be limited to purposes that support the programs and activities described in this MOU as part of the service delivery system.

## **Impasse—Dispute Resolution**

If an issue arises involving this MOU, parties will make every effort to reach a resolution in a timely and efficient manner. Any part 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.

If not resolved, the issue and the efforts to resolve will be documented and forwarded to the Executive Director of the Southwest Florida Workforce Development Board, Inc. and the Director of the partner agency. A joint decision shall be issued within 60 calendar days of receipt.

If dissatisfied with the decision, the dispute may be filed with the Department of Economic Opportunity (DEO) and the Commissioner of the Department of Economic Opportunity (DEO) to review concerns and determine resolution. DEO and DOE may remand the issue back to the Executive Director of CareerSource Southwest Florida and to the Director of the partner agency or impose other remedies to resolve the issue.

## **Limitation of Liability**

To the extent permitted by law, each party agrees to be responsible for any liability that directly relates to any and all of its own acts or omissions or the acts or omissions of its employees. In no event will any party be liable for any indirect or consequential damages caused by actions or omissions of another party or by the employees of another party.

## **General Provisions**

The laws and regulations listed in this section are generally applicable to most publically-funded programs administered by the Florida Department of Economic Opportunity (DEO). The laws and regulations listed herein do not encompass all of the laws and regulations that govern the parties in their respective roles under this MOU. All parties expressly agree to comply with the federal laws and regulations listed below unless the laws and regulations that govern their particular program state otherwise:

- A. **Jobs for Veterans Act.** Each party agrees to provide priority of service to veterans and covered spouses for any qualified job training program pursuant to 38 USC 2813.
- B. **Americans with Disabilities.** Each party, its officers, employees, members, and subcontractors hereby affirm current and ongoing compliance with all statutes and regulations pertaining to The Americans with Disabilities Act of 1990 and Section 504 of the Rehabilitation Act of 1973.



- C. **Pro-Children Act.** If any activities call for services to minors, each party agrees to comply with the Pro-Children Act of 1994 (45 CFR 98.13) that requires smoking to be banned in any portion of any indoor facility owned, leased, or contracted by an entity that will routinely or regularly use the facility for the provision of health care services, day care, library services, or education to children under the age of eighteen (18).
- D. **Drug-Free Workplace.** Each party, its officers, employees, members, subrecipient(s) and/or any independent contractors (including all field staff) associated with this MOU agree to comply with 29 CFR 94 and all other applicable state and federal laws regarding a drug-free workplace and to make a good faith effort to maintain a drug-free workplace. Each party will make a good faith effort to ensure that none of its officers, employees, members, and subrecipient(s) will purchase, transfer, use, or possess illegal drugs or alcohol or abuse prescription drugs in any way while working or while on public property.
- E. **Ethics Laws.** Each party certifies that by executing this MOU, it has reviewed Florida Statute, Chapter 112, and knows and understands Florida's ethics and conflict of interest laws. Each party further agrees that it will not engage in any action(s) inconsistent with laws.

### **Partial Invalidity**

All questions as to the execution, validity, interpretation, and performance of this MOU shall be governed by the laws of Florida. Should any portion of this MOU be found unenforceable by operation of statute or by administrative or judicial decision, it is the intention of the parties that the remaining portions of this MOU will not be affected as long as performance remains feasible with the absence of the illegal or unenforceable provision(s).

### **Counterpart**

This agreement may be executed in one or more than one counterpart and each executed counterpart will be considered an original, provided that the counterpart is delivered by facsimile, mail courier or electronic mail, all of which together will constitute one and the same agreement.


**MEMORANDUM OF UNDERSTANDING**  
**Workforce Innovation and Opportunity Act (WIOA)**  
**Local Workforce Development Area 24**  
  
**One-Stop Career Center System**  
**Partners of the American Job Center Network**

**Signature Page**

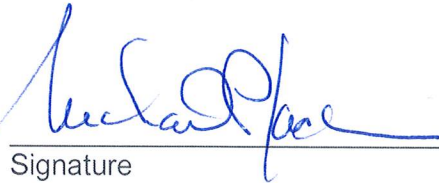
*By signing below, all parties mutually agree to the terms prescribed herein.*

*Mitchell Wills*  
**Michael Swindle, Chairman,**  
**Southwest Florida Job Training Consortium**  
Chief Elected Official

**Michael P. Jackson, President**  
CareerSource Southwest Florida Board

  
\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

  
\_\_\_\_\_  
Signature

12/12/2017  
\_\_\_\_\_  
Date

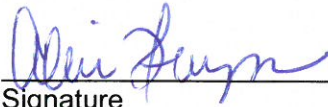
**MEMORANDUM OF UNDERSTANDING**  
**Workforce Innovation and Opportunity Act (WIOA)**  
**Local Workforce Development Area 24**

**One-Stop Career Center System**  
**Partners of the American Job Center Network**

**Signature Pages**

*By signing below, all parties mutually agree to the terms prescribed herein.*

**Allison Flanagan, Director**  
Florida Department Education  
Division of Vocational Rehabilitation,

 \_\_\_\_\_  
Signature Date 8/8/18

**Robert L. Doyle, III, Director**  
Florida Department Education,  
Division of Blind Services

\_\_\_\_\_  
Signature Date

**MEMORANDUM OF UNDERSTANDING**  
**Workforce Innovation and Opportunity Act (WIOA)**  
**Local Workforce Development Area 24**

**One-Stop Career Center System**  
**Partners of the American Job Center Network**

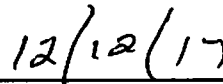
**Signature Pages**

*By signing below, all parties mutually agree to the terms prescribed herein.*

**Stephen Dionisio, Superintendent**  
Charlotte County Public Schools/Adult Education  
and Career and Technical Education



Signature



Date

**MEMORANDUM OF UNDERSTANDING**  
**Workforce Innovation and Opportunity Act (WIOA)**  
**Local Workforce Development Area 24**

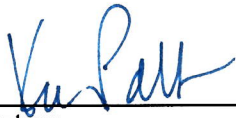
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**Partners of the American Job Center Network**

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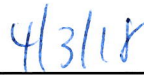
*By signing below, all parties mutually agree to the terms prescribed herein.*

**Kamela Patton, Superintendent**


Collier County Public Schools/Adult Education  
and Career and Technical Education



\_\_\_\_\_  
Signature



\_\_\_\_\_  
Date

Reviewed: 

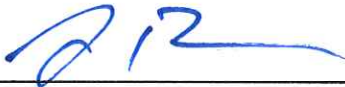
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**Local Workforce Development Area 24**

**One-Stop Career Center System**  
**Partners of the American Job Center Network**

**Signature Pages**

*By signing below, all parties mutually agree to the terms prescribed herein.*

**Scott Bass, Superintendent**  
Glades County School District/Adult Education  
and Career and Technical Education



Signature




Date

**MEMORANDUM OF UNDERSTANDING**  
**Workforce Innovation and Opportunity Act (WIOA)**  
**Local Workforce Development Area 24**  
**One-Stop Career Center System**  
**Partners of the American Job Center Network**

**Signature Pages**

*By signing below, all parties mutually agree to the terms prescribed herein.*

**Paul K. Puletti, Superintendent**  
Hendry County Schools/Adult Education  
and Career and Technical Education

  
\_\_\_\_\_  
Signature

  
\_\_\_\_\_  
Date

**MEMORANDUM OF UNDERSTANDING**  
**Workforce Innovation and Opportunity Act (WIOA)**  
**Local Workforce Development Area 24**

**One-Stop Career Center System**  
**Partners of the American Job Center Network**

**Signature Pages**

*By signing below, all parties mutually agree to the terms prescribed herein.*

**Gregory K. Adkins, Superintendent**  
School District of Lee County/Adult Education  
and Career and Technical Education

  
\_\_\_\_\_  
Signature

  
\_\_\_\_\_  
Date

Approved as to Form:  
By:   
\_\_\_\_\_  
School Board Attorney



**MEMORANDUM OF UNDERSTANDING**  
**Workforce Innovation and Opportunity Act (WIOA)**  
**Local Workforce Development Area 24**

**One-Stop Career Center System**  
**Partners of the American Job Center Network**

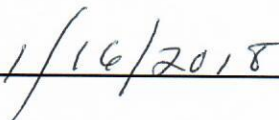
**Signature Pages**

*By signing below, all parties mutually agree to the terms prescribed herein.*

**David Leopard, Regional Manager**

AARP Foundation/SCSEP

  
Signature

  
Date

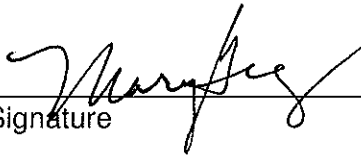
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**Workforce Innovation and Opportunity Act (WIOA)**  
**Local Workforce Development Area 24**

**One-Stop Career Center System**  
**Partners of the American Job Center Network**

**Signature Pages**

*By signing below, all parties mutually agree to the terms prescribed herein.*

**Mary Geoghegan, Center Director** \_\_\_\_\_  
Job Corps

Signature  \_\_\_\_\_

Date 10/30/19 \_\_\_\_\_

**MEMORANDUM OF UNDERSTANDING**  
**Workforce Innovation and Opportunity Act (WIOA)**  
**Local Workforce Development Area 24**

**One-Stop Career Center System**  
**Partners of the American Job Center Network**

**Signature Pages**

*By signing below, all parties mutually agree to the terms prescribed herein.*

**Roger Mercado, Director**  
Lee County Department of Human and  
Veteran Services / CSBG

  
\_\_\_\_\_  
Signature

3.13.18  
\_\_\_\_\_  
Date

**MEMORANDUM OF UNDERSTANDING**  
**Workforce Innovation and Opportunity Act (WIOA)**  
**Local Workforce Development Area 24**

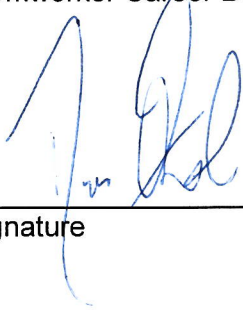
**One-Stop Career Center System**  
**Partners of the American Job Center Network**

**Signature Pages**

*By signing below, all parties mutually agree to the terms prescribed herein.*

**Dorin Oxender, Director**

Collier County Public Schools, - iTECH  
Farmworker Career Development Program (FCDP)



\_\_\_\_\_  
Signature



\_\_\_\_\_  
Date

**Infrastructure Funding Agreement  
Workforce Innovation and Opportunity Act (WIOA)  
One-Stop Career Center System  
Partners of the American Job Center Network**

**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 (hereafter referred to as the Partners) and CareerSource Southwest Florida (hereafter referred to as “CSSWF”).

**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 an effective and successful one-stop system. The law requires an IFA for one comprehensive center; therefore this IFA is intended to demonstrate the coordination of resources for workforce services in the Immokalee center.

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. INFRASTRUCTURE COST BUDGET**

The shared costs for the CareerSource Southwest Florida center in Immokalee:

<b>Organization – Required Partners</b>	<b>Program</b>	<b>Square Feet</b>	<b>Monthly</b>
CareerSource Southwest Florida	WIOA; TANF	9,917	\$19,979.96
Department of Economic Opportunity	Employment Service; TAA; LVER & DVOP	2,059	\$3,435.10
FLDOE / Vocational Rehabilitation	State Vocational Rehabilitation (VR) Services	618	1,607.83
FLDOE / Blind Services	State Blind Services	0	
Collier County Public Schools	Adult Education and Literacy Act (AEFLA)	0	
Collier County Public Schools	Career and Technical Education	0	
Collier County Public Schools	National Farmworker Jobs Program (Migrant and seasonal farmworker programs)	0	
AARP Foundation	Senior Community Service Employment Program (SCSEP)	0	
Cornerstone Solutions	Job Corps	0	

Organization – Other Partners / Services	Program	Square Feet	Monthly
Children's Network	Oversee foster and adoption related services	2,438	\$5,213.25
Alliance of Educational Leaders	Naples Children and Education Foundation	934	\$2,870.39
Alliance of Educational Leaders	Guidance Programs for Success (GPS)	929	\$440.44
Immokalee Community Redevelopment Agency	Implement community redevelopment activities	760	\$1,813.86
Alliance of Educational Leaders	Afterschool Nutrition Program	715	\$200.20
Avow Hospice	Palliative care and support	670	\$1,528.44
Department of Business and Professional Regulations	Compliance, Farm Labor Program	350	\$924.88
Empowerment Alliance	Homes for low-income families	300	\$900.00
Alliance of Educational Leaders	21st CCLC After School Program , Miracle 1	205	\$487.50
Alliance of Educational Leaders	21st CCLC After School Program, Miracle 2	170	\$355.50

The Division of Vocational Rehabilitation will satisfy its IFA contribution by continuing to make payments under state of Florida lease number 480:0647.

#### IV. COST ALLOCATION METHODOLOGY

Square footage will be utilized as the allocation bases to determine overall Partner contributions. This will be 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.

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

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

1. Partners will provide CSSWF with the following information no later than fifteen (15) days after the end of each quarter, as applicable:
  - o Quarterly cost information and documentation of the actual costs,
  - o Updated staffing information (per the 1st day of the 1st month of each quarter), and
  - o Actual customer participation numbers (per the last day of the last month of each quarter).
2. Upon receipt of the above information, CSSWF will:
  - o Compare budgeted costs to actual costs,
  - o Update the allocation bases, and
  - o Apply the updated allocation bases, as described in the Cost Allocation Methodology section above, to determine the actual costs allocable to each partner.
3. CSSWF will prepare an updated budget document showing cost adjustments and will prepare an invoice for each Partner with the actual costs allocable to each Partner for the quarter.
4. CSSWF will submit the invoices to the Partners and send a copy of the updated budget to all Parties no later than forty-five (45) days after the end of each quarter. The Partners understand that the timeliness of CSSWF's preparation and submission of invoices and

adjusted budgets is contingent upon the timeliness of each Partner in providing the necessary cost information. For Partners that advance funds to the local area, CSSWF will only send a copy of the updated budget.

5. Upon receipt of the invoice and adjusted budget, each Partner will review both documents and will submit payment to CSSWF no later than fifteen (15) days following receipt. Payment of the invoice signifies agreement with the costs in the adjusted budget. For Partners that advance funds to the local area, CSSWF may draw down funds for quarterly payments upon approval via email of the reconciled budget.
6. Partners will communicate any disputes with costs in the invoice or the adjusted budget CSSWF in writing. CSSWF will review the disputed cost items and respond accordingly to the Partner within ten (10) days of receipt of notice of the disputed costs. When necessary, CSSWF will revise the invoice and the adjusted budget upon resolution of the dispute.

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

The Partners and CSSWF conferred regarding the involvement of each partner at the CSSWF Centers. The appropriate allocation bases were discussed and those bases included in this IFA were agreed upon as the most appropriate. CSSWF 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. Should informal resolution efforts fail, the dispute resolution process must be formally initiated by the petitioner seeking resolution. The petitioner must send a notification to the XYZ local WDB Chair (or designee) and all Parties to the MOU regarding the conflict within 10 business days.
2. The CSSWF Chair (or designee) shall place the dispute on the agenda of a special meeting of CareerSource's Executive Committee. The Executive Committee shall attempt to mediate and resolve the dispute. Disputes shall be resolved by a 2/3 majority consent of the Executive Committee members present.
3. The decision of the Executive Committee shall be final and binding unless such a decision is in contradiction of applicable State and Federal laws or regulations governing the Partner agencies.
4. The Executive Committee must provide a written response and dated summary of the proposed resolution to all Parties to the MOU.
5. The CSSWF Chair (or designee) will contact the petitioner and the appropriate Parties to verify that all are in agreement with the proposed resolution.

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.

**SIGNATURES**

*Mitchell Willis*

**Michael Swindle, Chairman, Southwest Florida Job Training Consortium**  
Chief Elected Official

*Michael Swindle*  
Signature

12/12/17  
Date

*Allison Flanagan, Director*

**Pam Stewart, Commissioner**  
Florida Department Education  
Division of Vocational Rehabilitation

*Pam Stewart*  
Signature

8/8/18  
Date

**Michael P. Jackson, President**  
CareerSource Southwest Florida

*Michael P. Jackson*  
Signature

12/12/2017  
Date



**THIRD AMENDED AND RESTATED  
INTERLOCAL AGREEMENT  
FOR THE  
SOUTHWEST FLORIDA JOB TRAINING CONSORTIUM**

**THIS THIRD AMENDED AND RESTATED INTERLOCAL AGREEMENT** (this "**Agreement**") is made and entered into as of June 30, 2018 by and between the Boards of County Commissioners for Charlotte, Collier, Glades, Hendry, and Lee Counties, political subdivisions of the State of Florida, for continuation of the Southwest Florida Job Training Consortium.

WHEREAS, the Workforce Investment Act of 1998, federal Public Law 105-220 ("**WIA**"), replaced the Job Training Partnership Act as amended in 1996, and restructured a multitude of workforce development programs into an integrated workforce investment system and authorized the expenditure of federal funds for allowable services and activities in local workforce investment (development) areas; and

WHEREAS, the counties of Charlotte, Collier, Glades, Hendry, and Lee (collectively, the "**Counties**") were designated by the Governor of the State of Florida, as recommended by the Jobs and Education Partnership in 1996, to form a five county workforce development area, Region 24, and this designation was approved by the Governor to continue under WIA; and

WHEREAS, the Counties had previously entered into an interlocal agreement in 1996 creating the Southwest Florida Job Training Consortium and had entered into an agreement with a Private Industry Council acting as grant recipient and administrative entity until such time as Southwest Florida Workforce Development Board, Inc. ("**SFWDB**") was formed, and continued under that agreement ("**Original Interlocal Agreement**"); and

WHEREAS, subsequent to the Original Interlocal Agreement, the Counties entered into that certain Workforce Investment Act Interlocal Agreement for the Southwest Florida Job Training Consortium dated as of July 1, 2005 to amend and restate the Original Interlocal Agreement ("**First Amended and Restated Interlocal Agreement**"); and

WHEREAS, subsequent to the First Amended and Restated Agreement, the Counties entered into that Second Amended and Restated Interlocal Agreement for the Southwest Florida Job Training Consortium dated as of March 20, 2012 ("**Second Amended and Restated Interlocal Agreement**"); and

WHEREAS, WIA has been replaced by the Workforce Innovation and Opportunity Act (codified as 29 U.S.C. § 3101 et seq.) (the "**Act**") and the five participating Counties have agreed to enter into this Agreement to amend and restate the Second Amended and Restated Agreement to incorporate statutory changes; and

WHEREAS, SFWDB is in existence and operational with respect to the Region 24 Workforce Development Area; and

WHEREAS, the Region 24 Workforce Development Area is required to submit a Workforce Innovation and Opportunity Act local plan pursuant to Section 108 of the Act; and

WHEREAS, Section 163.01, Florida Statutes, known as the Florida Interlocal Cooperation Act of 1969, permits local governmental units to make the most efficient use of their powers by enabling them to cooperate with other localities on a basis of mutual advantage and thereby provide services and facilities in a manner and pursuant to forms of governmental organization that will accord best with geographic, economic, population, and other factors influencing the needs and development of local communities; and

WHEREAS, the Boards of County Commissioners for Charlotte, Collier, Glades, Hendry, and Lee Counties find this Interlocal Agreement to be necessary, proper and convenient to the exercise of their powers, duties and purposes authorized by law.

NOW THEREFORE, in consideration of the mutual covenants herein, the Counties agree as follows:

- I. Continuation of the Southwest Job Training Consortium.
  - A. Consistent with the Original Interlocal Agreement, the Counties agree to accept the Governor's designation of the five county local area as Workforce Development Area for Region 24 for purposes of programs promulgated under the Act ("Workforce Development Area").
  - B. Consistent with the Original Interlocal Agreement, the Counties agree to continue the Southwest Florida Job Training Consortium (the "Consortium") which is composed of the Chief Local Elected Official (Chair) from each of the participating County Commissions, or a designee, who shall be an elected County Commissioner. These five Chairs will elect one member of the Consortium to serve as Chair of the Consortium. The Chair shall remain in its position as Chair until replaced by the Consortium. The Consortium may elect to rotate the position of Chair each year according to procedures which may be developed by the Consortium.
- II. Authority and Responsibilities of the Southwest Florida Job Training Consortium.
  - A. Sections 107, 108, and 121 of the Act (codified as 29 U.S.C. § 3122, § 3123 and § 3151), as may be amended from time to time, are hereby incorporated within this Agreement as if set out herein. Any reference herein to a provision or section of the Act or any other applicable law shall be deemed to include a reference to the applicable successor provision, section or law that may be adopted from time to time.
  - B. The Consortium shall request any change in the number of board members of SFWDB that will represent each county, identify which sector they will represent, identify the length of term, and request certification from the Governor should any

changes to the current representation be required, ensuring that board membership of SFWDB meet the requirements of Section 107 of the Act.

C. Pursuant to Section 107 of the Act, a majority of the board members of SFWDB shall be representatives of business (each, a **“Business Representative”** or collectively, **“Business Representatives”**) in the Workforce Development Area. Each County Chair, or designee Commissioner, shall be responsible for making his/her County’s Business Representative appointment(s) from nominations received pursuant to this subsection to be board members of SFWDB in accordance with the Act. Each appointee proposed by the County Chair, or designee Commissioner, shall be presented to, and approved by, the Board of County Commissioners of his/her County prior to being seated as a board member of SFWDB. Each Business Representative nominated pursuant to this subsection must adhere to the following criteria:

1. Representatives of business in the Workforce Development Area who are owners of businesses, chief executives or operating officers of business, or other business executives or employers with optimum policymaking or hiring authority;
2. Representatives of businesses, including small businesses, or organizations representing businesses described in this clause, that provide employment opportunities that, at a minimum, include high-quality, work-relevant training and development in in-demand industry sectors or occupations in the Workforce Development Area; and
3. Representatives are appointed from among individuals nominated by local business organizations and business trade associations.

The nomination process for an appointment as a Business Representative to the board of SFWDB shall be as follows:

1. A Business Representative shall be selected from among individuals nominated by a local business organization or business trade association (i.e. Economic Development organization, Chamber of Commerce, or similar entity) after consulting with and receiving recommendations from other business organizations in the Workforce Development Area.
2. Nominations, and any individual selected from such nominations as a Business Representative, shall reasonably represent the industrial and demographic composition of the business community.

D. Pursuant to Section 107 of the Act, not less than twenty percent (20%) of the board members of SFWDB shall be representatives of the workforce (each, a **“Labor/Training Representative”**) within the Workforce Development Area who:



1. Shall include representatives of labor organizations (for a local area in which employees are represented by labor organizations), who have been nominated by local labor federations, or (for a local area in which no employees are represented by such organizations) other representatives of employees;
2. Shall include a representative, who shall be a member of a labor organization or a training director, from a joint labor-management apprenticeship program, or if no such joint program exists in the area, such a representative of an apprenticeship program in the area, if such a program exists;
3. May include representatives of community-based organizations that have demonstrated experience and expertise in addressing the employment needs of individuals with barriers to employment, including organizations that serve veterans or that provide or support competitive integrated employment for individuals with disabilities; and
4. May include representatives of organizations that have demonstrated experience and expertise in addressing the employment, training, or education needs of eligible youth, including representatives of organizations that serve out-of-school youth.

A nominee meeting the foregoing criteria for a Labor/Training Representative shall be presented by SFWDB to the Chair of the Consortium for approval by the Chair prior to being seated as a board member of SFWDB.

- E. Pursuant to Section 107 of the Act, the board of SFWDB shall include representatives of entities administering education and training activities (each, an **Educational Representative**) in the Workforce Development Area, who:
1. Shall include a representative of eligible providers administering adult education and literacy activities under 29 U.S.C. § 3271 et seq.;
  2. Shall include a representative of institutions of higher education providing workforce investment activities (including community colleges);
  3. May include representatives of local educational agencies, and of community-based organizations with demonstrated experience and expertise in addressing the education or training needs of individuals with barriers to employment.

For purposes of this Section, the Chair of the Alliance of Educational Leaders shall be approved as an Educational Representative meeting the requirements of this subsection. Any other nominee meeting the foregoing criteria for an Educational

Representative shall be presented by SFWDB to the Chair of the Consortium for approval by the Chair prior to being seated as a board member of SFWDB.

- F. Pursuant to Section 107 of the Act, the board of SFWDB shall include representatives of governmental and economic and community development entities (each, a “**Government/Economic Development Representative**”) in the Workforce Development Area, who:
1. Shall include a representative of economic and community development entities;
  2. Shall include an appropriate representative from the State employment service office under the Wagner-Peyser Act (29 U.S.C. § 49 et seq.) serving the Workforce Development Area;
  3. Shall include an appropriate representative of the programs carried out under title I of the Rehabilitation Act of 1973 (29 U.S.C. § 720 et seq.), other than section 112 or part C of that title (29 U.S.C. § 732, 741), serving the Workforce Development Area;
  4. May include representatives of agencies or entities administering programs serving the Workforce Development Area relating to transportation, housing, and public assistance; and
  5. May include representatives of philanthropic organizations serving the Workforce Development Area.

A nominee meeting the foregoing criteria for a Government/Economic Development Representative shall be presented by SFWDB to the Chair of the Consortium for approval by the Chair prior to being seated as a board member of SFWDB.

- G. The board of SFWDB may include such other individuals or representatives of entities as the Consortium may determine from time to time to be appropriate.

- H. The Consortium shall share with SFWDB the responsibility for the following:

1. Approval of the local plan or modification of the local plan described under Section 108 of the Act for Region 24 pursuant to the following procedure. SFWDB shall prepare and adopt the proposed local plan (or modification, as applicable) as required by the Act and transmit the same to the Consortium for its approval prior to submission of the local plan to the Governor pursuant to the Act and Florida law. Transmission of the local plan shall be by sending or delivering a copy of the local plan to both the Chair and the county administrator or county manager, as applicable, for each of the Counties. The local plan submitted to the Consortium for

approval under this section shall be deemed approved by the Consortium at the end of the sixty (60) day period beginning on the date upon which the proposed local plan is received by the Consortium ("**Local Plan Review Period**") unless one or more members of the Consortium notifies SFWDB in writing prior to the expiration of the Local Plan Review Period of either an objection to the local plan or that it has requested a meeting of the Consortium to review the local plan. If any member of the Consortium provides such written notice to SFWDB, a meeting of the Consortium shall be called for the purpose of reviewing the local plan within thirty (30) days after the Consortium member's correspondence ("**Requested Plan Review Period**"). In the event the Consortium does not take action to approve or disapprove the local plan for any reason prior to the expiration of the Requested Plan Review Period, the local plan shall be deemed approved by the Consortium;

2. Approval of the annual budget of SFWDB for purposes of carrying out the duties of SFWDB pursuant to Section 108 of the Act in accordance with the following procedures. SFWDB shall prepare and adopt an annual budget as may be required by law and transmit the same to the Consortium for its approval. Transmission of the budget shall be by sending or delivering a copy of the budget to both the Chair and the county administrator or county manager, as applicable, for each of the Counties. The budget submitted to the Consortium for approval under this section shall be deemed approved by the Consortium at the end of the sixty (60) day period beginning on the date upon which the proposed budget is received by the Consortium ("**Budget Review Period**") unless one or more members of the Consortium notifies SFWDB in writing prior to the expiration of the Budget Review Period of either an objection to the budget or that it has requested a meeting of the Consortium to review the budget. If any member of the Consortium provides such written notice to SFWDB, a meeting of the Consortium shall be called for the purpose of reviewing the budget within thirty (30) days after the Consortium member's correspondence ("**Requested Budget Review Period**"). In the event the Consortium does not take action to approve or disapprove the budget for any reason prior to the expiration of the Requested Budget Review Period, the budget shall be deemed approved by the Consortium. During any period of review of the budget by the Consortium and until approval of the budget by the Consortium, SFWDB can continue its operations consistent with the budget that was most recently approved by the Consortium. Any material modification to any budget approved by the Consortium hereunder shall be approved by the Consortium in accordance with the foregoing procedure. For purposes of this section, the addition into SFWDB's budget of mid-year, program specific earmarked funds from the state or federal government shall not be deemed to be a material modification to SFWDB's budget;

3. Approval of a memorandum of understanding with one-stop partners concerning the operation of the one-stop delivery system in the Workforce Development Area ("**MOU**") pursuant to Section 121 of the Act in accordance with the following procedures. SFWDB shall prepare and adopt the MOU as may be required by law and transmit the same to the Consortium for its approval. Transmission of the MOU shall be by sending or delivering a copy of the MOU to both the Chair and the county administrator or county manager, as applicable, for each of the Counties. The MOU submitted to the Consortium for approval under this section shall be deemed approved by the Consortium at the end of the sixty (60) day period beginning on the date upon which the proposed MOU is received by the Consortium ("**MOU Review Period**") unless one or more members of the Consortium notifies SFWDB in writing prior to the expiration of the MOU Review Period of either an objection to the MOU or that it has requested a meeting of the Consortium to review the MOU. If any member of the Consortium provides such written notice to SFWDB, a meeting of the Consortium shall be called for the purpose of reviewing the MOU within thirty (30) days after the Consortium member's correspondence ("**Requested MOU Review Period**"). In the event the Consortium does not take action to approve or disapprove the MOU for any reason prior to the expiration of the Requested MOU Review Period, the MOU shall be deemed approved by the Consortium;
  
4. Approval of a one-stop operator or the termination for cause of a one-stop operator pursuant to Section 108 of the Act ("**One-Stop Operator Action**") in accordance with the following procedures. In the event SFWDB shall require One-Stop Operator Action, SFWDB shall provide notice of the same ("**One-Stop Operator Notice**") to the Consortium for its approval. Transmission of the One-Stop Operator Notice shall be by sending or delivering a copy of the notice to both the Chair and the county administrator or county manager, as applicable, for each of the Counties. The One-Stop Operator Action submitted to the Consortium for approval under this section shall be deemed approved by the Consortium at the end of the thirty (30) day period beginning on the date upon which the proposed One-Stop Operator Action is received by the Consortium ("**One-Stop Action Review Period**") unless one or more members of the Consortium notifies SFWDB in writing prior to the expiration of the One-Stop Action Period of either an objection to the One-Stop Operator Action or that it has requested a meeting of the Consortium to review the One-Stop Operator Action. If any member of the Consortium provides such written notice to SFWDB, a meeting of the Consortium shall be called for the purpose of reviewing the budget within thirty (30) days after the Consortium member's correspondence ("**Requested One-Stop Action Review Period**"). In the event the Consortium does not take action to approve or disapprove the One-Stop Operator Action for any reason prior to the expiration of the

Requested One-Stop Action Review Period, the One-Stop Operator Action shall be deemed approved by the Consortium; and

5. Oversight of the one-stop delivery system in the Workforce Development Area.

### III. Terms of Agreement.

A. None of the parties hereto shall be liable for any claims, damages, losses or expenses arising out of or resulting from any act, omission, negligence of the others, their officers, employees or agents, related parties' respective authorities and responsibilities under this Agreement.

B. The term of the Agreement shall commence upon the adoption of this Agreement by the last of the Counties and shall run through June 30, 2022, which date coincides with the next local plan submittal date required under Section 108 of the Act. Thereafter the term of this Agreement shall automatically be renewed for successive five-year terms, unless any party notifies the others of its intention not to renew at least ninety (90) days prior to the expiration of the original term or the then-current five-year renewal term.

C. Upon proper execution, the Agreement shall be legally valid and binding, and supersedes other agreements of the Southwest Florida Job Training Consortium. This Agreement shall be recorded in the public records of the counties of Charlotte, Collier, Glades, Hendry, and Lee.

D. This Agreement may be amended or modified upon the written request of any party hereto. Any alterations, amendments, modification or waivers in the terms and conditions of this Agreement shall not be effective unless reduced to writing, approved by all parties, signed by their duly authorized representatives and filed with the Clerks of the Circuit Courts of the Counties.

*{Remainder of page intentionally left blank. Signatures commence on the next page.}*



IN WITNESS WHEREOF, the parties have executed this Agreement as indicated on the attached pages.

PASSED AND DULY ADOPTED THIS 7<sup>TH</sup> DAY OF AUGUST, 2018.

ATTEST:  
LINDA DOGGETT, CLERK  
LEE COUNTY CLERK OF COURTS

BY: Missy Flint  
Deputy Clerk



BOARD OF COUNTY COMMISSIONERS  
OF LEE COUNTY, FLORIDA

BY: [Signature]  
Cecil Pendergrass, Chair


APPROVED AS TO FORM FOR THE  
RELIANCE OF LEE COUNTY ONLY

[Signature]  
County Attorney's Office

PASSED AND DULY ADOPTED THIS 26<sup>th</sup> DAY OF June, 2018.

BOARD OF COUNTY COMMISSIONERS  
OF CHARLOTTE COUNTY, FLORIDA

By: [Signature]  
Chair or Commissioner Designee \*



Attest:

Michelle DiBenedino  
\_\_\_\_\_

By: Deputy Clerk  
AG22005-029


APPROVED AS TO FORM AND  
LEGAL SUFFICIENCY

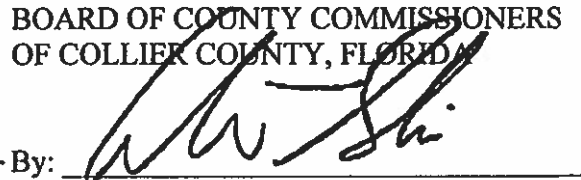
By: Janeth S. Kurosh  
County Attorney  
LR 18-0432

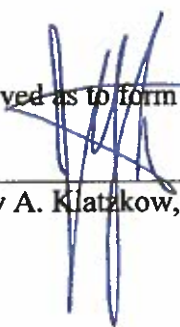
PASSED AND DULY ADOPTED THIS 26th DAY OF June, 2018.

Attest:  
CRYSTAL K. KINZEL, Interim Clerk

BOARD OF COUNTY COMMISSIONERS  
OF COLLIER COUNTY, FLORIDA

By:   
Attest as to Chairman's Clerk  
signature only.

By:   
ANDY SOLIS, CHAIRMAN

Approved as to form and legality:  
  
Jeffrey A. Klatakow, County Attorney

ORIGINAL

PASSED AND DULY ADOPTED THIS 25 DAY OF June, 2018.

BOARD OF COUNTY COMMISSIONERS  
OF GLADES COUNTY, FLORIDA

By: [Signature]  
Chair or Commissioner Designee

Attest:

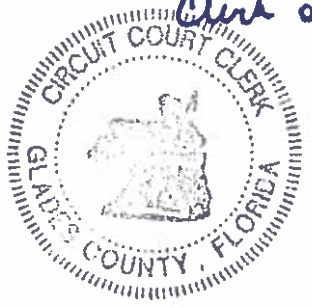
Sandra H Brown  
P O Box 10  
Moore Haven Fl 33471

By: Sandra H Brown  
Clerk of Court



APPROVED AS TO FORM AND  
LEGAL SUFFICIENCY

By: [Signature]



PASSED AND DULY ADOPTED THIS 24th DAY OF July, 2018.

BOARD OF COUNTY COMMISSIONERS  
OF HENDRY COUNTY, FLORIDA

By: [Signature]  
Chair or Commissioner Designee

Attest:  
[Signature]  
Barbara Butler, Clerk

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

APPROVED AS TO FORM AND  
LEGAL SUFFICIENCY  
By: [Signature]

**Southwest Florida Workforce Development Board, Inc. /  
CareerSource Southwest Florida**

**Request to Extend Designation as a Direct Provider of Workforce Services**

**May 4, 2017**

In 2008, with the passing of Senate Bill 428 which modified Chapter 445 of the Florida Statutes, the Southwest Florida Workforce Development Board, Inc. (SFWDB) requested and received authorization to be designated as a direct provider of certain workforce services (other than training services). In 2011 and in 2014, three-year extensions were requested and approved. At this time, we request an extension for the period of July 1, 2017 through June 30, 2020. Upon approval the following modifications will be incorporated into our Workforce Services Plan.

**1. A review of how the provision of direct services during the prior period fit the business model that the Local Workforce Development Board (LWDB) proposed in its original request, and any proposed changes in the business model or the particular workforce services the LWDB intends to provide during the extension period.**

During the prior period the Southwest Florida Workforce Development Board, Inc. dba CareerSource Southwest Florida has been the provider of Workforce Innovation and Opportunity Act (WIOA) Adult, WIOA Dislocated Worker, some WIOA Youth services, Temporary Assistance for Needy Families (TANF) services and Supplemental Nutrition Assistance Program (SNAP) services through staff located in the CareerSource Southwest Florida “One-Stop” centers throughout the Region. SNAP services were provided voluntarily through December 2015 and through mandatory programs starting in January 2016. If at any time work requirements again become voluntary due to higher unemployment rates, we will likely continue with a voluntary SNAP program.

The original business model included a Leadership Team comprised of the Executive Director, the Deputy Director, the Alliance of Educational Leaders Director, the Programs Division Director and the Planning and Grants Division Director. In 2011, we proposed the addition of the Fiscal Division Director and the Business Development Division Director. Throughout the years our Leadership Team has developed and now includes the Executive Director, Deputy Director, Planning and Grants Division Director, Programs Division Director, Fiscal Division Director, Director of Business Services, Communications Director, IT Division Director and Quality Assurance Program Managers. The Leadership Team meets with the CareerSource Southwest Florida Center Supervisors on a monthly basis and has effectively provided oversight and guidance to the One-Stop Centers.

We continued to follow our standard procurement process to contract for Workforce Innovation and Opportunity Act (WIOA) Out-of-School Youth services for the July 2015 - June 2016 Program Year. However, in March 2016, it was decided all WIOA Youth services would be provided directly through Center staff. The change occurred in April 2016 and has allowed for better integration of services and a smoother flow of services.

**2. The effective date, for when the extension would begin.**

The effective date for this extension will be July 1, 2017.

**3. The period of time, not to exceed three years, for when the extension will be in effect.**

This extension is requested for the period of July 1, 2017 through June 30, 2020.

**4. A review of the LWDB's stated reasons in its previous request why the LWDB has decided to directly provide the workforce services, and an explanation of how it is in the best interest of the LWDB's customers that the LWDB continue to provide these services.**

In the previous request, most workforce services, to include Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker, Temporary Assistance for Needy Families (TANF), Supplemental Nutrition Assistance Program (SNAP) and some WIOA Youth programs and services were provided by CareerSource Southwest Florida staff. In April 2016, we began providing all WIOA Youth programs directly through CareerSource Southwest Florida staff. Extending the direct provision of services will allow for continued improvement in providing services, reduced costs and consistent staff training and integration. Center staff is now able to provide services to customers in a more coordinated fashion.

**5. A review of the effectiveness of the firewall established by the LWDB to clearly separate existing roles as oversight body for the region's workforce delivery system and its role as the operational services directly provided by the LWDB, and an explanation of changes to be made to the firewall.**

Oversight – The Leadership Team includes Executive Director, Deputy Director, Planning and Grants Division Director, Programs Division Director, Fiscal Division Director, Director of Business Services, Communications Director, IT Division Director and the Quality Assurance Program Managers. Through this Leadership Team, the Board sets goals for the CareerSource Southwest Florida centers. A system of individual performance standards and objectives ensures organizational goals are met. Members of the Leadership Team and any SFWDB staff involved in writing policy are not involved in the delivery of One-Stop services. The Board provides oversight of the local workforce system and ensures appropriate reviews and monitoring of One-Stop activities. Programs are also monitored three times per year by the Board's monitoring contractor.

Operational Services – The Center Supervisors provide the direct supervision and are responsible for the day-to-day operations and performance outcomes of the One-Stop centers. The Center Supervisors report to the Leadership Team monthly to review the system and make necessary changes to improve services to customers. This system has proven an effective means of separating oversight from operational activities.

**6. An identification of the grant program(s) that fund the workforce service delivery model.**

- Workforce Innovation and Opportunity Act (WIOA) Adult
- Workforce Innovation and Opportunity Act (WIOA) Dislocated Workers
- Workforce Innovation and Opportunity Act (WIOA) Youth
- Temporary Assistance for Needy Families (TANF)
- Supplemental Nutrition Assistance Program (SNAP)

The Wagner-Peyser and Veterans program staff are employed by the Florida Department of Economic Opportunity (DEO). Functional supervision of DEO staff is provided jointly by the Center Supervisors and the DEO Operations and Management Consultant II.

**7. An analysis of the costs of the services that documents the actual reduction in costs with the LWDB providing the services rather than contracting that service to another provider, and an estimate of such costs and savings for the upcoming period.**

By providing services directly, the Southwest Florida Workforce Development Board, Inc. dba CareerSource Southwest Florida saw a reduction in costs. Annual overhead costs and profit charged by contracted service providers were estimated by reviewing previous years' expenses. Based on these figures, the reduction in costs over a period of three years is estimated to be \$2,732,252. Other reductions include costs for the bidding process for selection of service providers for workforce programs.

	<u>2014/2015</u>		<u>2015/2016</u>		<u>2016/2017</u>		<u>TOTAL</u>
<b>WIOA-A&amp;DW</b>	157,883	+	157,883			=	\$315,766
<b>WIOA-Adult</b>					2,384,000	x 10%	= \$238,400
<b>WIOA-DW</b>					2,753,000	x 10%	= \$275,300
<b>Youth</b>	650,000	+	1,092,432	+	2,235,000	= 3,977,432	x 15% = \$596,615
<b>TANF</b>	2,026,038	+	2,060,538	+	2,360,000	= 6,446,576	x 18% = \$1,160,384
<b>SNAP</b>	128,074	+	331,852	+	350,000	= 809,926	x 18% = \$145,787

**Estimated reduction in cost previous 3-year period: \$2,732,252**

Based on initial allocations for the coming year, cost savings will be more important than ever and are expected to be an estimated \$3,325,700, at a minimum, for the next three-year period.

	<u>2017/2018</u>		<u>2018/2019</u>		<u>2019/2020</u>		<u>TOTAL</u>
<b>WIOA-Adult</b>	2,275,000	+	2,160,000	+	2,060,000	= 6,495,000	x 10% = \$649,500
<b>WIOA-DW</b>	1,895,000	+	1,800,000	+	1,710,000	= 5,405,000	x 10% = \$540,500
<b>WIOA-Youth</b>	2,125,000	+	2,015,000	+	1,920,000	= 6,060,000	x 15% = \$909,000
<b>TANF</b>	2,125,000	+	1,915,000	+	1,725,000	= 5,765,000	x 18% = \$1,037,700
<b>SNAP</b>	350,000	+	350,000	+	350,000	= 1,050,000	x 18% = \$189,000

**Estimated reduction in cost for upcoming 3-year period: \$3,325,700**



**8. A review of any other realized improvement to service delivery and performance outcomes, and description of anticipated improvements.**

As outlined below, CareerSource Southwest Florida has realized improvements in business services, continuity, professionalism, services to participants, communication and performance.

A single, region-wide approach to business, media and community outreach has resulted in greater coordination of services to employers and the business community. This has helped to reduce duplication of business services i.e. reduce the instances of multiple contracted providers contacting business and business organizations with same or similar objectives. Restructuring of Business Services included the addition of Account Executives to improve the job referral process, relationships with employers and our employer penetration rate. The Account Executives have worked with Center staff to increase the number of job orders, internships and on-the-job (OJT) opportunities.

By being the direct provider of services, the frequency and quality of training has vastly improved. In September 2016, our Training Coordinator began a series of staff development sessions to include new hire, refresher and continuous improvement training. Information is distributed more quickly and consistently which provides greater continuity of services to our business and individual customers. This has also resulted in much more timely attainment of Workforce Professional Tier I Certifications and Continuing Education Units (CEUs). All staff receives the same message whether training is program specific (Welfare Transition Best Practices, SNAP Sanction Process, W-P Job Order Process Training, WIOA Youth 101) or beneficial to multiple groups (Stress & Time Management, Active Listening, Case Notes). Much of the training is provided by staff; some is secured through outside experts (Human Trafficking).

Our career laddering system, originally implemented in 2008, continues to allow front-line staff to progress through Career Development Representatives levels I through IV. Levels are based on workforce program knowledge and have proven to be an effective means of promoting integrated services.

The Board's SharePoint intranet system and portals have allowed staff greater communication and sharing of information. Staff is able to access calendars, schedules, announcements, policies, procedures, reports, forms and documents. They are also able to upload data, and share "found" resources with each other. Centers continue to move toward more electronic document management processes. With document scanners and e-signature capability, intake and case management generates less paper and more accessible information. Staff is making strong headway with WIOA programs as DEO is able to use the files in Document Manager. Using electronic files is speeding up processes, saving paper, and more importantly, resulting in a better use of staff time. We envision continued enhancements to technology, which will provide staff a multitude of resources. One such enhancement will be adding SARA, a participant tracking system in the coming program year. This electronic participant tracking/communications system will be accessible by 50+ staff with caseloads and a few additional staff with administrative privileges/abilities. The two-way interactive product/system which will track and document activities of customers to include assessment, job search, classroom training, on-the-job training, work experience, employment and job retention follow-up. Per ERISS, the developer/provider, this platform is designed to allow staff more time to "engage customers in more in-depth meaningful interactions; the high-value, high-skills activities which have been proven to lead to positive outcomes and increased participant satisfaction."

CareerSource Southwest Florida has continued to meet or exceed the Common Measures. At 69.75%, our Individual Training Account (ITA) Expenditure Rate for WIOA Adults and Dislocated Workers continues to exceed the required 50%. Since 2014, all Center staff, to include DEO staff, now has written expectations to ensure continued high levels of performance and customer satisfaction. This has helped in maintaining high levels of performance.

**9. Documentation that the public was provided a meaningful opportunity for review and comment on the proposed extension for a period not less than 10 days. Any submitted comments must be included.**

A draft of this “Request to Extend Designation as Direct Provider of Workforce Services” was made available for more than ten days on our website at [www.careersourcesouthwestflorida.com](http://www.careersourcesouthwestflorida.com). A Notice for Public Comment was forwarded to all five county offices within our Region for posting. The draft was emailed to the chairs of each of the Boards of County Commissioners within our five-county area and to our Board members. Submitted comments will be considered and attached to this extension.

**10. Documentation that the Chief Elected Official has agreed to the planned extension.**

The attached signature page will be signed by the Southwest Florida Workforce Development Board, Inc. President/Chairman and the Chief Elected Official. To obtain the signature of our Chief Elected Official, we requested this item be placed on the agenda for consideration and signature. We are scheduled for presentation to the Hendry County Board of County Commissioners on May 9, 2017. The completed signature page will be forwarded after the signature is acquired.

If there are any questions or additional information is needed, please feel free to contact Joe Paterno at (239) 225-2500 or [jpaterno@sfwdb.org](mailto:jpaterno@sfwdb.org).

**Local Workforce Development Board  
Request for Extension to Provide Direct Services**

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LWDB Number: 24      LWDB Name: Southwest Florida Workforce Development Board, Inc. / CareerSource Southwest Florida

Contact Names: Joe Paterno, Executive Director or  
Mary Anne Zurn, Planning & Grants Division Director

Contact Phone Number: (239) 225-2500

The Local Workforce Development Board seeks to extend its designation as a direct service provider of certain services by agreement of the Chief Elected Official and the Governor. This extension to the designation of the Local Workforce Development Board as a direct service provider of certain services is to be effective for the period July 1, 2017 through June 30, 2020.

The signatures below certify agreement to the request for extension submitted by the Local Workforce Development Board and the assurance that the Local Workforce Development Board will operate in accordance with this extension, its Workforce Service Plan, and applicable federal and state laws and regulations.

**Chief Elected Official**

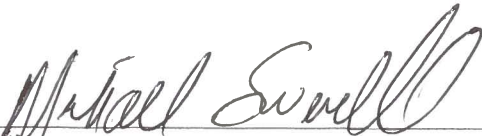
**Chairman, Local Workforce Development Board**

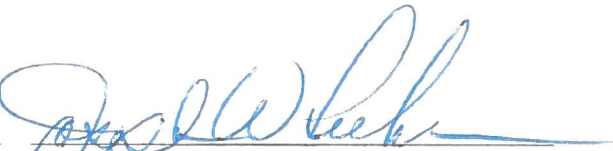
Michael Swindle  
Name (printed or typed)

Joseph Wheeler  
Name (printed or typed)

Chairman, Southwest Florida  
Job Training Consortium  
Title

President / Chairman  
Title

  
\_\_\_\_\_  
Signature

  
\_\_\_\_\_  
Signature

5/9/17  
\_\_\_\_\_  
Signature Date

5/8/17  
\_\_\_\_\_  
Signature Date







## AREA(S) OF REPRESENTATION CODES

BU – Business

WOLO – Workforce-Labor Organization

WOJ – Workforce-Joint labor-management Apprenticeship Program

WOD – Workforce-Community-based Organizations representing Individuals with Disabilities (optional)

WOV – Workforce-Community-based Organizations representing Veterans (optional)

WOY – Workforce-Community-based Organizations representing Youth (optional)

ETPA – Education and Training Provider-Adult Education and Literacy

ETPC – Education and Training Provider-Institution of Higher Education

ETPO – Education and Training Provider-Other Providers (optional)

GRED – Government Representative-Economic Development

GRES – Government Representative-Employment Service

GRVRD – Government Representative-Vocational Rehabilitation

GRO – Government Representative-Other (optional)

OTHER – Other (please specific group/program being represented) (optional)

## DEMOGRAPHICS CODES

### **GENDER CODES**

M – Male

F – Female

### **RACE/ETHNIC CODES**

W – White (not Hispanic)

B – Black/African American (not Hispanic)

W/H – White and Hispanic

B/H – Black and Hispanic

O – Other

### **OTHER CODES**

D – Disabled individual

OI – Older individual

V – Veteran

**SOUTHWEST FLORIDA WORKFORCE DEVELOPMENT BOARD, INC.**

**January 8, 2020**

**3:30 p.m.**

**MINUTES**

**Directors Present:**

Diana Bello	Curtis Brown
B.J. Brundage	Drummond Camel
Michael Dalby	Keitha Daniels
Bill Diamond	Martin Haas
Brian Hirsch	Kim Hustad
Mike Jackson	Dr. Robert Jones
Brent Kettler	Mike Nagle
Aaron Stitt	John Talmage
Nancy Tedros	Joe Wheeler
Michael Wukitsch	Geri Yoraschek

**Directors Absent:**

James Coalwell	Dave Gammon
Jim Lamb	Melvin Morgan
Brad Myers	

**Guests Present:**

Troy Collett, Division of Blind Services	Chavis Cook, Public/SNAP Participant
Rita Davis, Lee County School District	Brian Granstra, Lee County School District
Dr. Ron Natale, One Stop Operator	Greg Urbancic, Board Attorney

**Staff Present:**

Janeth Castrejon	Peg Elmore
Joe Paterno	Benita Richards
Mary Anne Zurn	

**I. CALL TO ORDER**

The meeting was called to order by Mike Jackson, Chair, 3:30 p.m., at CareerSource Southwest Florida, Fort Myers.

**II. WELCOME AND INTRODUCTIONS**

Welcome and introductions were made by all present. Mike Jackson welcomed two new Board of Directors Curtis Brown, Ace Hardware and Michael Wukitsch, Lee Health.

**III. APPROVAL OF MINUTES**

Martin Haas made a **motion** to approve the November 8, 2019, minutes; Nancy Tedros seconded, and the motion was unanimously approved by the Board.

**IV. PUBLIC COMMENT**

State Law, Right to be Heard: 286, will be offered following each motion. Public Comment: N/A

## V. COMMITTEE REPORTS

*Finance Committee* – Michael Dalby, Chair, shared a copy of the Audit Report for the period ending June 30, 2019, is in the meeting packet and referenced the last page, Statement of Findings – NO findings!

Michael Dalby made a **motion** to approve the Audit Report for the period ending June 30, 2019; Joe Wheeler seconded, and the motion was unanimously approved by the Board.

Public Comment – N/A

Michael reported the Committee discussed the current audit services contract. We are still inside the five years, to review/re-new annually. There are no changes in the contract regarding cost and/or services.

Michael Dalby made a **motion** the Board extend our contract with Powell and Jones for audit services for one year; B.J. Brundage seconded, and the motion was unanimously approved by the Board.

Public Comment – N/A

*Program and Planning Committee* – Kim Hustad, Chair, Local Workforce Plan was e-mailed 12/19/19. In summary, it is the Board's Strategic Plan for the next four years, July 1, 2020-June 30, 2024. The Plan will be e-mailed out for Public comment 1/9/20-2/9/20. The Plan is required to be signed by our Board President and Chair of our Southwest Florida Job Training Consortium, currently the Hendry Board of County Commissioners' Chair, Mitchell Wills. The final Plan is due to the Department of Economic Opportunity (DEO) by 3/16/20. In order to comply with required deadlines and ensure proper oversight, the Program and Planning is making the following recommendation to the Board:

Kim Hustad made a **motion** to authorize the Executive Committee, on behalf of the Board, to make the final approval in February and present to the Consortium Chair for signature; Bill Diamond seconded, and the motion was unanimously approved by the Board.

Public Comment – N/A

*Public Relations Committee* – Diana Bello reported on behalf of absent Chair, Jim Lamb. Three Board members attended today as potential new members of the Committee. Janeth Castrejon updated the Committee on Social Media and will be presenting updates to the Board. Please mark your calendars for the Dunbar Career Exploration Event, 2/20/20, and encouraged everyone to stay for the Open House/Ribbon Cutting Ceremony today following the Board meeting.

*Service Delivery Committee* – Bill Diamond, Chair, shared the Committee reviewed Center Performance Reports, which are included in the Board packets, Regional unemployment rates, and a presentation update regarding the Center Surveys. Center Surveys are on-line in English only; still have to complete hard copy for Spanish and Creole.

*Youth Council* – Aaron Stitt, Chair, reported the Council met Tuesday evening at the Tri-County Apprenticeship Academy and received a tour of the facility following the meeting; highly recommended to tour. Aaron also reminded the Board of the Dunbar Career Exploration Event, 2/20/20, 6pm, at the STARS Complex. In addition, the Council reviewed our current website options for youth career exploration and if it is possible to be more interactive for the youth and their families. Picture This As A Career Poster Contest is underway; please be sure to vote if you visit any of our CareerSource Southwest Florida Centers. Two Counties, Charlotte and Lee, had such a large participation rate, there was not adequate wall space to hang all the posters. Therefore, photos of the posters were taken and the photos are available in binders for review and vote.



## **VI. EMPLOYEE RETENTION SURVEY**

Peg Elmore gave an update on the Retention Survey sent out in the fall by the Business Services Division to businesses, received a low response rate. She collaborated with the Horizon Council, who sent out a slightly different survey through their contacts, in an effort to gather more responses, and received a slightly higher response rate. CEOs and larger companies responded to the Horizon Council survey stating retention is not an issue. However, CareerSource Southwest Florida did score high on recommending/re-use our services. Copies of both CareerSource Southwest Florida and Horizon Council survey results are included in your meeting packet. In addition, Benita Richards will e-mail to the Board.

## **VII. SOCIAL MEDIA UPDATE**

Janeth Castrejon gave a PowerPoint presentation on Social Media updates. Handouts are also included in your meeting packet. Facebook remains the top Social Media outlet. All Social Media outlets continue to increase each quarter. In addition, Janeth showed a video highlight from the September Annual Award Ceremony.

## **VIII. ONE STOP OPERATOR REPORT**

Dr. Ron Natale reported he is responsible to visit each of our Centers and report to the Board annually, however, he tends to visit more often. He not only measures success, but are we doing things with efficiency. He visited our Naples and Fort Myers Centers this week and finds all is well. Region 24 is doing a great job and he shares our best practices with other Regions. He plans to return in March to visit Clewiston, Immokalee, and Port Charlotte Centers.

## **IX. 2030 WORKFORCE SUMMIT STEERING COMMITTEE**

This Committee has met twice and is planning to host six employer meetings. The objective is to discuss with employers workforce needs, such as, transportation, housing, etc.

## **X. OPEN FORUM**

Chavis Cook, member of Public Forum, requested to address the Board. He is a SNAP participant, previously from Pinellas County, now here in Lee County. He complimented CareerSource Southwest Florida, Fort Myers, for promptly assisting him where other Regions were not able to assist him. In addition, he submitted a business proposal for a Technical Training Center/IT Academy.

Rita Davis, the School District of Lee County, shared the technical colleges in Region 24 are in the process of developing a Comprehensive Local Needs Assessment (CLNA) plan as part of our Perkins grant application. The results of the CLNA will help guide the use of Perkins funds to support career and technical education programs throughout our Region for the next two years. Everyone is welcome at the Regional Workforce Summit being held on Tuesday, January 21, 2020, 8:30 A.M. to 10:00 A.M., concurrent at multiple locations through-out the Region. During the summit, we will gather your input on specific topics related to career and technical education and workforce alignment. Benita Richards will e-mail the invitation/details to the Board.

Following the Board meeting TODAY, stay for the Open House/Ribbon Cutting Ceremony!

## **XI. ADJOURNMENT**

The meeting adjourned at 5:10 p.m.

**Public Comments / Changes**

as of 2/26/20

Added signature page.

Clarified clean water efforts under Analysis of Need and Available Resources, Part (3).

Added Florida SouthWestern (FSW) as a participating partner under Organizational Structure, Part (4), A.

Attachment B (Infrastructure Funding Agreement) now included in Attachment A (Memorandum of Understanding).

BYLAWS  
OF  
SOUTHWEST FLORIDA WORKFORCE DEVELOPMENT BOARD, INC.  
A FLORIDA NOT-FOR-PROFIT CORPORATION

ARTICLE I

WORKFORCE DEVELOPMENT AREA

Southwest Florida Workforce Development Board, Inc. (the “**Corporation**”) shall serve the population of Region 24, which is composed of Charlotte, Collier, Glades, Hendry and Lee Counties. The Corporation functions, in part, pursuant to the Workforce Investment and Opportunity Act (codified as 29 U.S.C. § 3101 et seq.) (“**WIOA**”) and Chapter 445, Florida Statutes. Any reference in these Bylaws to a provision or section of WIOA or any other applicable law shall be deemed to include a reference to the applicable successor provision, section or law that may be adopted from time to time.

ARTICLE II

MEMBERS

Section 1. Membership. Members shall be those persons appointed to serve as members of the Corporation pursuant to the provisions of the Third Amended and Restated Interlocal Agreement for the Southwest Florida Job Training Consortium and otherwise in a manner consistent with Section 445.007, Florida Statutes and Section 107 of WIOA (codified as 29 U.S.C. § 3122), all as may be amended from time to time.

ARTICLE III

BOARD OF DIRECTORS

Section 1. Consists of All Members. All members of the Corporation are on the board of directors (“**Board**”). The terms Board and members are equivalent, and the terms member and director are equivalent.

Section 2. Number of Directors. The number of directors on the Board shall be consistent with the requirements of WIOA and Section 445.007, Florida Statutes; provided, however the number of directors shall never be less than three.

Section 3. Meeting Schedule.

(1) The Corporation shall hold meetings every other month or as otherwise determined by a majority vote of the Board.

(2) The annual meeting shall be the meeting designated as such by the Board.

(3) Special meetings may be called by the Executive Director, or by the President of the Corporation.

Section 4. Notice of Meetings. Written notice of the date, time, and place of regular and special meetings together with an agenda of the business to be conducted shall be sent to all directors at least seven (7) days in advance of such meetings. If the President, or Executive Director, determines that an emergency situation requires that a special meeting be called, the seven (7) day notice requirement may be waived. All notice of meetings shall meet the requirements of Section 286.011, Florida Statutes (“Sunshine Law”).

Section 5. Location of Meetings. All meetings shall be at a location open and accessible to the general public, in accordance with the requirements of the Florida Sunshine Law. Meeting locations shall be within the geographic area that comprises the Region 24 Workforce Development Board Area.

Section 6. Use of Telecommunications. Pursuant to the authority contained in Section 445.007(1), Florida Statutes, any one or more directors may participate in a meeting of the Board by means of a telephone conference or other telecommunications device that allows all persons participating in the meeting to hear each other or to see in written form the words of the other directors. A director participating in a meeting by such telephone conference or other telecommunications device shall be deemed present in person at such meeting for purposes of establishing a quorum. The Board may adopt a policy by resolution to implement the provisions of this Section 6, which policy may address situations when a telecommunications will be used by the Board and such other procedural matters as may be determined by the Board.

Section 7. Quorum and Voting.

(1) A quorum of a Board shall consist of one-third of the whole number of appointed directors. As used herein, “appointed directors” means those directors actually seated pursuant to Article II and does not include any director seats that have not been filled at the applicable time pursuant to Article II.

(2) Except as otherwise provided herein, the affirmative vote of a majority of directors present at a meeting where a quorum of the Board is present shall be the act of the Board.

(3) A director of the Corporation who is present at a meeting of the Board or a committee of the Board when corporate action is taken is deemed to have assented to the action taken unless:

(a) The director objects, at the beginning of the meeting or promptly upon the director’s arrival, to holding the meeting or transacting specified actions at the meeting; or

(b) The director votes against or abstains, in accordance with Sections 112.3143 and 286.012, Florida Statutes, from the action taken.

(4) Voting and voting conflicts shall be determined in accordance with Chapter 112, Part III, Florida Statutes (Code of Ethics for Public Officers and Employees) and other applicable law. Additionally, for reference, pursuant to 29 U.S.C. § 3122(h), no director or member of a Standing Committee may vote on a matter under consideration by the Corporation (a) regarding the provision

of services by such director (or by an entity such director represents) or (b) that would provide a direct financial benefit to such director or the immediate family of such director. Further, pursuant to Section 445.007(1), Florida Statutes, if the Corporation enters into a contract with an organization or individual represented on the Board, the contract must be approved by a two-thirds vote of the Board, a quorum having been established, and the director who could benefit financially from the transaction must abstain from voting on the contract. Finally, contracts with a director or a relative (as defined in Section 112.3143(1)(c), Florida Statutes) shall be subject to the requirements of Section 445.007(11), Florida Statutes, as may be amended from time to time.

Section 8. Procedure at Meetings.

(1) Robert's Rules of Order shall govern the procedures of Board meetings, except when inconsistent with the provisions of these Bylaws.

(2) All business shall be conducted in accordance with the agenda.

Section 9. Compensation of Directors. The Board shall serve without compensation.

Section 10. General Standards for Directors.

(1) A director shall discharge his or her duties as a director, including his or her duties as a member of a committee, in good faith, with the care of an ordinarily prudent person in a like position would exercise under similar circumstances, and in a manner he or she reasonably believes to be in the best interests of the Corporation.

(2) In discharging his or her duties, a director may rely on information, opinions, reports, or statements, including financial statements and other financial data, if prepared or presented by:

(a) One or more officers or employees of the Corporation whom the director reasonably believes to be reliable and competent in the matters presented;

(b) Legal counsel, public accountants, or other persons as to matters the director reasonably believes are within the persons' professional or expert competence; or

(c) A committee of the Board of which he or she is not a member if the director reasonably believes the committee merits confidence.

(3) A director is not acting in good faith if he or she has knowledge concerning the matter in question that makes reliance on information, opinions, reports or statements by others unwarranted.

(4) A director shall not be liable for any action taken as a director, or any failure to take any action, if he or she performed the duties of his or her office in compliance with this section.

Section 11. Removal.

(1) Generally. Directors may be removed with or without cause from office by the affirmative vote of a majority of the Board at a meeting at which a quorum is present. Prior to any action by the Board to remove a director, the Corporation shall provide notice to the applicable

director and include the matter on the Board agenda for the meeting at which the removal is to be considered.

(2) Special Provision Relating to Attendance. Regular attendance at meetings of the Board is critical to the successful functioning and operation of the Corporation. As such, any director who is not present for fifty percent (50.0%) or more of the meetings of the Board in any Program Year may be subject to removal from office at the discretion of the Board. The Executive Director or the Executive Director's designee shall present the name(s) of any such director(s) to the Board for its consideration. Removal of a director shall be by the affirmative vote of a majority of the Board at a meeting at which a quorum is present.

(3) Notice. Written notice of any removal by action of the Board shall be provided to the removed director by either certified mail or first class mail to the last address of the removed director shown on the records of the Corporation. The action to remove the director shall also automatically include termination of the individual's membership in the Corporation and the removal of the individual from any and all committee(s) on which he or she may serve.

Section 12. Automatic Resignation. Pursuant to certain federal and state laws including, without limitation, 29 U.S.C. § 3122(b)-(d), the Board is required to have certain members who are representatives of specific entities or organizations in order to meet the legal requirements for Board composition. In the event a director has been appointed to the Board because of his or her representation of an entity or organization pursuant to applicable federal or state law, and thereafter such director's employment with said entity or organization ceases or is terminated, then such director shall automatically be deemed to have resigned his or her position on the Board as well as any officer position he or she holds in the Corporation immediately upon the Corporation receiving notice of the cessation or termination of the director's employment with the applicable entity or organization.

Section 13. Financial Disclosure. Pursuant to Section 445.007(1), Florida Statutes, each director who is not otherwise required to file a full and public disclosure of financial interests pursuant to Section 8, Article II of the State Constitution or Section 112.3144, Florida Statutes shall file a statement of financial interests pursuant to Section 112.3145, Florida Statutes.

Section 14. Indemnification. Each director of the Corporation, now or hereafter serving as such, shall be indemnified by the Corporation against any and all claims and liabilities to which he or she has or shall become subject by reason of serving or having served as director or by reason of any action alleged to have been taken, omitted or neglected by him or her as such director; and the Corporation shall reimburse each such person for all legal expenses reasonably incurred by him or her in connection with any such claim or liability; provided, however, that no such person shall be indemnified against or be reimbursed for any expense incurred in connection with any claim or liability arising out of his or her willful misconduct, recklessness or gross negligence.

The amount paid to any director by way of indemnification shall not exceed his or her actual, reasonable and necessary expenses incurred in connection with the matter involved, and any determination so made shall be binding on the indemnified director.

The right of indemnification hereinabove provided for shall not be exclusive of any rights to which any director may otherwise be entitled by law.

Section 15. Executive Director. Pursuant to, and subject to, the requirements of 29 U.S.C. § 3122(f), the Board shall hire an Executive Director to assist in carrying out the functions of the Corporation under WIOA (29 U.S.C. § 3101 et seq.). The Board, based upon the recommendation of the Executive Committee, shall establish and apply a set of objective qualifications for the position of Executive Director that ensures that the individual selected has the requisite knowledge, skills, and abilities, to meet identified benchmarks and to assist in effectively carrying out the functions of the Corporation. The Executive Director will be nominated by the Executive Committee and confirmed by the Board. The Executive Director will be an employee of the Corporation and not a member of the Board. The Executive Director shall be responsible for the general and active management of the business and affairs of the Corporation, subject to the direction of the Executive Committee and the Board, as applicable.

## ARTICLE IV

### OFFICERS

Section 1. Enumeration of Offices. The officers of the Corporation shall be a President, Vice President, Secretary, and Treasurer. The President shall be elected from those directors representing the private sector in accordance with the provisions of Section 2 of this Article.

Section 2. Qualification. To qualify to be an officer of the Corporation, a person must be a director of the Corporation. In the event an officer for any reason ceases to be a director of the Corporation, then such person shall automatically be deemed to have resigned his or her officer position immediately upon his or her cessation or termination as a director.

Section 3. Election of Officers. The election of all other officers shall take place at the annual meeting of the Board, and shall be elected by a majority of those directors present, provided a quorum is present.

Section 4. Term. Officers shall be elected bi-annually and shall serve a two-year term commencing the day of the election. The terms of the officers are limited to two (2) consecutive two-year terms in the same office. There are no limitations on the number of terms not in sequences or in different offices.

Section 5. Resignation and Removal. Any officer may be removed from office with or without cause by the affirmative vote of a majority of the Board at a meeting at which a quorum is present. Any officer may resign at any time giving written notice to the Board, the President, Vice President, Secretary, Treasurer or Executive Director. Such resignation shall take effect on the date of receipt of such notice or at any later time specified therein, and unless otherwise specified therein, the acceptance of such resignation shall not be necessary to make such resignation effective.

Section 6. Vacancies. A vacancy in any office may be filled by majority vote of the Board at a meeting which a quorum is present. The officer appointed to such vacancy shall serve for the remainder of the term of the officer he or she replaces.

Section 7. Multiple Offices. The same individual may not simultaneously hold more than one officer position.

Section 8.     Duties. The duties of the officers are as follows:

(1)     President: The President shall preside, and act as chairman, at all Board and Executive Committee meetings; shall see that orders and resolutions of the Board are carried out; shall sign all written instruments, shall co-sign promissory notes and perform all duties incident to the office of the President as may from time to time be assigned by the Board.

(2)     Vice President: The Vice President shall act in the place of the President in the event of his or her absence, inability or refusal to act, and shall exercise and discharge such other duties as may be required of him or her by the Board.

(3)     Secretary: The Secretary with the assistance of staff shall record the votes and keep the minutes of all meetings and proceedings of the Board; keep the corporate seal of the Corporation and affix it on all papers requiring said seal; serve notice of meetings of the Board; keep appropriate current records showing the members of the Corporation together with their addresses; and perform all the duties incident to the office of Secretary as may from time to time be assigned by the Board.

(4)     Treasurer: The Treasurer shall receive and deposit in appropriate bank accounts all monies of the Corporation and disburse such funds as directed by resolution of the Board; sign promissory notes of the Corporation; keep proper books of account; complete the corporate annual report for the Department of the State; and perform all the duties incident to the office of Treasurer as may from time to time be assigned by the Board.

Section 9.     Contract Rights. The appointment of an officer does not in itself create contract rights. No officer shall serve the Corporation pursuant to contract.

Section 10.    Indemnification. Each officer of the Corporation now or hereafter serving as such shall be indemnified by the Corporation against any and all claims and liabilities to which he or she has or shall become subject by reason of serving or having served as such officer, or by reason of any action alleged to have been taken, omitted or neglected by him or her as such officer; and the Corporation shall reimburse each such person for all legal expenses reasonably incurred by him or her in connection with any such claim or liability; provided, however, that no such person shall be indemnified against, or be reimbursed for any expense incurred in connection with, any claim or liability arising out of his or her own willful misconduct, recklessness or gross negligence.

The amount paid to any officer by way of indemnification shall not exceed his or her actual, reasonable and necessary expenses incurred in connection with the matter involved, and any determination so made shall be binding on the indemnified officer.

The right of indemnification hereinabove provided for shall not be exclusive of any rights to which any officer may otherwise be entitled by law.



## ARTICLE V

### COMMITTEES

Section 1.     Appointment. Unless otherwise stated, committee members are not required to be members of the Corporation. It is the intent of the Board that committee membership reflect participation which represents the entire Southwest Florida service area, whenever possible. The Board shall appoint all members of Standing Committees (as defined herein) and Corporate Committees (as defined herein). No committee shall have two members representing the same organization.

Section 2.     Executive Committee. The Executive Committee shall be a Corporate Committee (as defined below) composed of the President, Vice President, Secretary, Treasurer, Immediate Past President and Chairpersons of Standing Committees. The Executive Committee shall serve as a management committee with administrative oversight responsibilities and is empowered to act and take necessary interim action to implement the plans and programs of the Board between meetings of the Board. When such interim action occurs, the Executive Committee will report on such action at the next Board meeting, at which time the action(s) of the Executive Committee shall be reviewed and ratified by the Board. In addition to the foregoing, the Executive Committee shall have the following functions and authority: (1) the Executive Committee shall conduct an annual review of the Executive Director and shall set the salary and any bonus of the Executive Director; and (2) upon request of the Executive Director, the Executive Committee shall consult with and advise the Executive Director on personnel matters; provided that with respect to any action by the Executive Committee pursuant to the foregoing subparts (1) and (2), no subsequent report to, or ratification by, the Board shall be required. Finally, the Executive Committee shall have such other authority and responsibilities as the Board may lawfully delegate to the Executive Committee.

Section 3.     Corporate Committees. There shall be the following committees of the Corporation ("**Corporate Committees**") that are established for the purpose of general corporate governance: (1) Executive Committee, (2) Finance Committee and (3) Public Relations Committee. The Corporate Committees shall have such duties and functions as specified by the Board. The President shall serve as an ex-officio member of the Finance Committee and the Public Relations Committee. In relation thereto, the President shall have the same rights and privileges of other Finance Committee or Public Relations Committee members, including, the right to vote; provided, however, the President shall not be included when determining the number of committee members needed for a quorum but, when in attendance, the President is counted when determining if a quorum of committee members is present.

Section 4.     Finance Committee. Each member of the Finance Committee must be a director of the Corporation. In the event a member of the Finance Committee for any reason ceases to be a director of the Corporation, then such person shall automatically be deemed to have resigned his or her Finance Committee position immediately upon his or her cessation or termination as a director. The Finance Committee shall have the following functions and responsibilities: (1) assist the Treasurer with financial review responsibilities and make recommendations regarding the annual budget to the Board; (2) review and approve any amendments to the annually adopted budget; (3) monitor the progress of the annual audit report and review the annual audit report when it is completed; (4) serve as a direct communication link between all independent audit firms and the Board; (5) conduct an annual review of the fixed assets of the Corporation; and (6) designate restricted

non-programmatic funds of the Corporation, which designation may only be modified by a supermajority vote of the Board. For purposes of this Section, a “supermajority vote of the Board” shall mean the affirmative vote of no less than two-thirds (2/3) of directors present at a meeting of the Board where a quorum is present.

Section 5. Public Relations Committee. The Public Relations Committee will set policy with respect to strategic public relations plans, community relations, outreach campaigns, and media communications.

Section 6. Standing Committees. There shall be the following standing committees (“**Standing Committees**”): (1) Program and Planning Committee, (2) Youth Council Committee and (3) Service Delivery Committee. The Standing Committees shall have such duties and functions as specified by the Board. The Standing Committees are established not for corporate governance, but rather to assist the Corporation in carrying out the programs and services of the Corporation contemplated under federal law, including WIOA. The membership of Standing Committees shall, whenever possible, have participation which reflects the division of members of the Corporation as set forth in Article II hereof. The President shall serve as an ex-officio member of all Standing Committees. The President shall have the same rights and privileges of other Standing Committee members, including, the right to vote; provided, however, the President shall not be included when determining the number of committee members needed for a quorum but, when in attendance, the President is counted when determining if a quorum of committee members is present.

Section 7. Nominating Committee. A Nominating Committee shall be appointed by the Board no later than the last Board meeting preceding the annual meeting of the Board during which an election of officers is scheduled. The Nominating Committee shall consist of no less than three (3) members and no more than five (5) members. The Nominating Committee shall present a recommended slate of officers for election to the Board at the annual meeting.

Section 8. Ad Hoc Committees. Ad Hoc Committees may be formed by the President or the Board and shall terminate upon completion of the matter of concern for which the committee was appointed. Members of any such Ad Hoc Committee shall be appointed by the President or Board, whichever formed the committee.

Section 9. Committee Chairpersons. The chairperson of the Executive Committee shall be the President. The chairperson of the Finance Committee shall be the Treasurer. The chairpersons of the Standing Committees or any other Corporate Committee shall be members of the Board. The chairperson of an Ad Hoc Committee need not be a member of the Board.

Section 10. Location and Notice of Committee Meetings. All committee meetings shall be held at a location open and accessible to the general public, in accordance with the requirements of the Florida Sunshine Law. Location of committee meetings shall be determined by the membership of the committee, or the Corporation staff member(s) assigned to that committee. All committee meetings shall be noticed in accordance with the Florida Sunshine Law.

Section 11. Quorum. Except as to Executive Committee meetings, for purposes of committee meetings, the presence of one-third (1/3) of all members appointed to the committee shall constitute a quorum for conducting the committee’s business. For purposes of Executive Committee

meetings, the majority of all members appointed to the Executive Committee shall constitute a quorum for conducting the Executive Committee's business.

Section 12. Use of Telecommunications. Pursuant to the authority contained in Section 445.007(1), Florida Statutes, any one or more committee members may participate in a committee meeting by means of a telephone conference or other telecommunications device that allows all persons participating in the meeting to hear each other or to see in written form the words of the other committee members. A committee member participating in a meeting by such telephone conference or other telecommunications device shall be deemed present in person at such meeting for purposes of establishing a quorum. The Board may adopt a policy by resolution to implement the provisions of this Section 12, which policy may address situations when a telecommunications may be used by a committee and such other procedural matters as may be determined by the Board.

## ARTICLE VI

### AMENDMENTS TO BYLAWS

These Bylaws may be altered, amended or repealed and new Bylaws adopted by the affirmative vote of two-thirds (2/3) of the directors present at a regular or special meeting with a quorum present, provided that any proposal to alter, amend or repeal Bylaws be submitted to each director at least fifteen (15) days prior to the meeting at which the proposal is to be considered.

## ARTICLE VII

### MISCELLANEOUS

Section 1. Annual Report For Department of State. The Corporation shall deliver to the Department of State for filing a sworn annual report each year by May 1, on such form as the Department of State prescribes, all in compliance with the Florida Not-For-Profit Corporation Act, as may be amended from time to time.

Section 2. Corporate Seal. The seal of the Corporation shall have inscribed on it the name of the Corporation, the year of its organization and the words "corporation not for profit." The words "corporate seal" or their equivalent may be used as a facsimile of or as the seal.

Section 3. Prohibited Activities. The Corporation shall not engage in any act which is prohibited by the Florida Not-For-Profit Corporation Act, as may be amended from time to time. The Corporation shall also not engage in any act which could give rise to it losing its tax exempt status under the Internal Revenue Code of 1986, as may be amended from time to time.

Section 4. Conflict. In the case of any conflict between the articles of incorporation and these Bylaws, the articles of incorporation shall control.

Section 5. Amendments to Articles of Incorporation. Any amendments to the articles of incorporation shall be made in the following manner: The directors shall adopt a resolution setting forth the proposed amendment and directing that it be submitted to a vote at a meeting of directors entitled to vote on the proposed amendment, which may either be an annual or a special meeting. Written notice setting forth the proposed amendment or a summary of the changes to be effected by

the amendment must be given to each director at least fifteen (15) days prior to the meeting at which the proposal is to be considered. The proposed amendment shall be adopted upon receiving the affirmative vote of two-thirds (2/3) of the directors present at the annual meeting or special meeting called for that purpose at which a quorum is present.

Section 6.      Corporate Records. The Corporation shall keep as permanent records correct and complete books and records of account and shall keep minutes of the proceedings of its directors. The Corporation shall also keep at its registered office in this state a copy of its articles of incorporation and its Bylaws and any amendments thereto and a record of the names and addresses of its directors. All books and records of the Corporation must be kept in written form or in another form capable of conversion into written form within a reasonable time and may be inspected by any director, or his or her agent or attorney, for any proper purpose at any reasonable time.